

## Registration Process for Bulk Re -Renewal Transfer Candidates

Corporate Agents must renew their candidates' licenses every **three years**. To qualify for renewal, each candidate is required to complete **25 hours of training**.

### Steps to Follow:

1. **Excel File Preparation:** Format the file according to the required template, ensuring all candidate and payment type is accurate.
2. **Upload for Payment:** Upload the completed Excel file to initiate the payment process.
3. **Payment Processing:** Complete the transaction using the authorized payment method and save the confirmation receipt.

### Step 1: Excel File Preparation

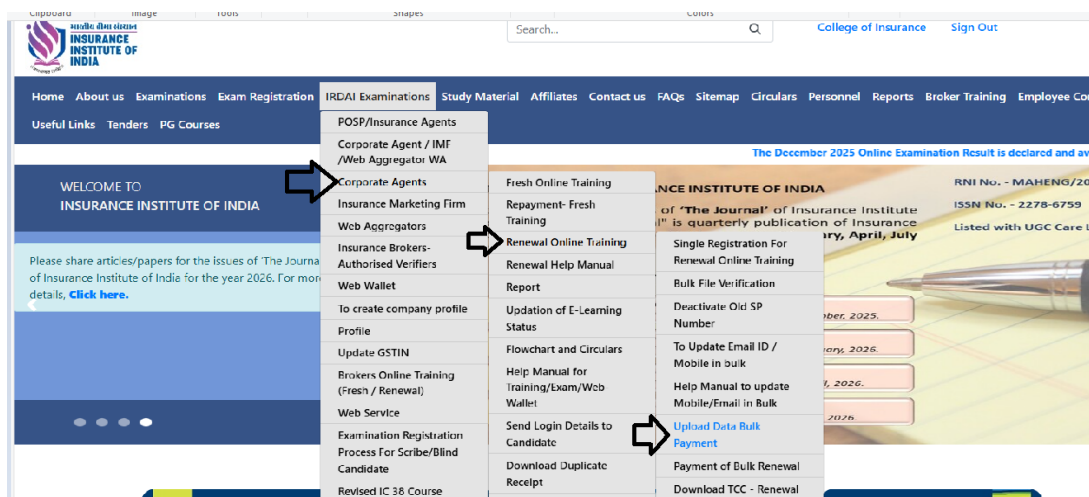
Before uploading to the portal, please ensure your Excel sheet is formatted exactly as follows to avoid system errors:

- **Header Format:** All column headings must be written in **CAPITAL LETTERS**.
- **File Format:** The file must be saved as a **Microsoft Excel 97–2003 Worksheet (.xls)**.
- **Sheet Name:** The tab at the bottom of the file must be named **Sheet1**.

PAN NUMBER	CERTIFICATION NUMBER	OLD CERTIFICATION NUMBER	EMAIL ID	MOBILE NUMBER

### Step 2: Uploading the Excel File for Payment

IRDAI Examination – Corporate Agent – Renewal Online Training – Update Data Bulk Payment



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The first screenshot shows the initial state with 'Payment Type' set to '---Select---' and 'Upload List of' set to '---Select---'. The second screenshot shows 'Payment Type' selected as 'payment for CA Re-Renewal Transfer Bulk Online Training' and 'Upload List of' as 'Details of Transfer Candidate'. The third screenshot shows 'Select Type of Intermediary' set to 'Corporate Agent' and the 'Choose File' button circled.

Once the upload page opens, the screen shown below will appear. Click the "**Choose File**" button to select and upload your prepared Excel file.

Once the file is selected, the **file name** will appear on the screen to confirm your selection. Click the **Upload** button to proceed.

This screenshot shows the file name 'Transferupl... ormat (1).xls' displayed next to the 'Choose File' button, which is circled. The 'Upload' button is also visible.

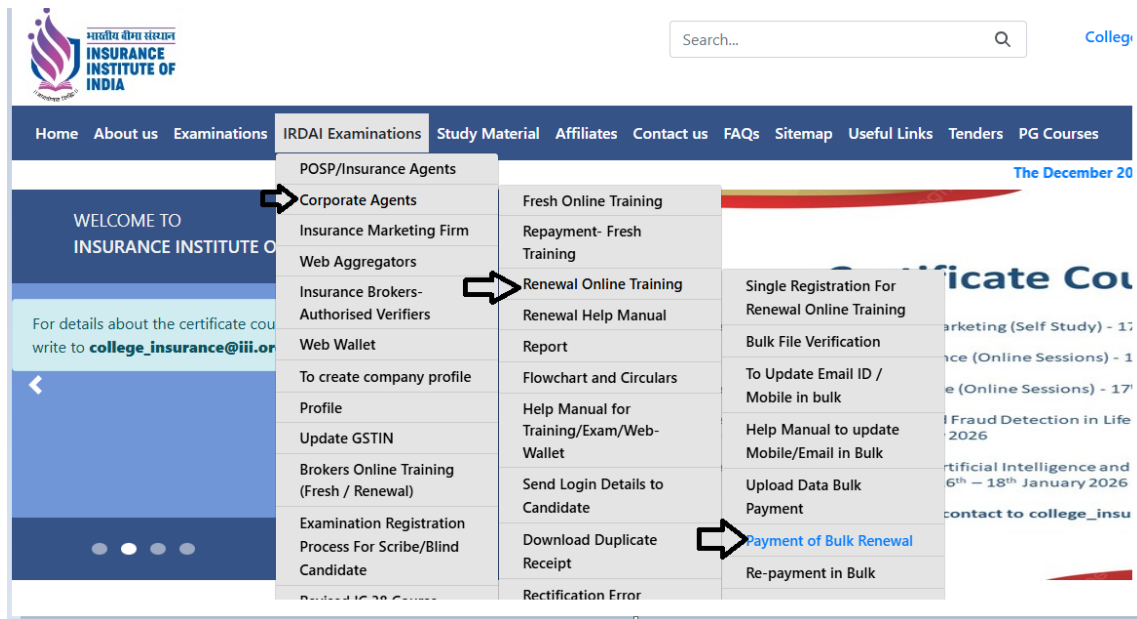
Once the upload is complete, a confirmation message will be displayed on the screen as shown below:

The final screenshot shows the confirmation message: "Total Records in File : 2", "Records uploaded successfully : 2", and "Please go to the option 'Renewal Bulk Payment' and select filter 'Validate Transfer Candidate' and try to validate CA re-renewal transfer case data".

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## Step 3: Payment Processing

IRDAI Examianction –Corporate Agent – Renewal Online Training – Payment of Bulk Renewal



From the dropdown or menu, select the "Validate Transfer Candidate" option and click the **Search** button to retrieve the records.

The screenshot shows the 'Corporate Agents- Online Renewal Training' form. The 'Status' dropdown is open, and 'Validate Transfer Candidates' is selected. The 'Search' button is highlighted. The form includes fields for 'Date Type', 'From Date', 'To Date', 'Pan No.', 'COR', 'Certification No of PO/SP/AV', and 'Sort By'. A red message at the bottom states: 'No records found for PAN Numbers by Uploaded file to Process for the Payment Between 2022-09-23 00:00:00.0 and 2023-08-19 23:59:59.0'.

Records will show on screen click on Validate Transfer data

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**Corporate Agents- Online Renewal Training**

Date Type: Uploaded date From Date: 23-09-2022 To Date: 19-08-2023

Status: Validate Transfer Candidates Pan No: COR: ---ALL---

Insurance Category: -----ALL----- Certification No of PO/SP/AV: Sort By: Uploaded Date

Search Reset

Select	Sr. No	Certification Number of IRDAI	Old Certification Number of IRDAI	Pan No	Upload Type	Eligibility	Remark
<input checked="" type="checkbox"/>	1				Re-Renewal Transfer Payment		
<input checked="" type="checkbox"/>	2				Re-Renewal Transfer Payment		

Validate Transfer Data

Select Service Provider Name \* -----Select-----

[<<<< First Page 1 >>>> Last Page](#)

## Registration Process for Bulk Re -Renewal Transfer Candidates

After validating records below details will show on the screen

The screenshot shows the 'Corporate Agents- Online Renewal Training' interface. At the top, there are search filters: Date Type (Uploaded date), From Date (23-09-2022), To Date (19-08-2023), Status (Validate Transfer Candidates), Pan No., COR (---ALL---), Insurance Category (---ALL---), Certification No of PO/SP/AV, and Sort By (Uploaded Date). Below these are 'Search' and 'Reset' buttons. A table displays candidate details with columns: Select, Sr. No, Certification Number of IRDAI, Old Certification Number of IRDAI, Pan No, Upload Type, Eligibility, and Remark. Two rows are visible, both marked as 'Eligible' with 'No remarks'. A 'Validate Transfer Data' button is below the table. At the bottom, there is a 'Select Service Provider Name' dropdown and pagination links: '<<<< First Page 1 >>>> Last Page'.

Select the "To do payment" option from the menu and click the **Search** button to view the records.

This screenshot shows the same interface as the previous one, but with the 'Status' dropdown menu open. The 'To Do Payment' option is highlighted. The 'Search' button is also circled. The table below still shows the same two eligible candidates.

Once the screen below appears, select the options as highlighted in the screenshot and click the **Go to Payment** button to proceed.

This screenshot shows the 'Corporate Agents- Online Renewal Training' interface after selecting 'To Do Payment'. The 'Status' dropdown is now 'To Do Payment'. The 'Activity Type' section has 'To Make Payment' selected. Below this, there are fields for 'Select Service Provider Name', 'GSTIN State', and 'GSTIN No'. At the bottom right, there is a 'Go To Payment' button. The table below shows the same two candidates, but with additional columns: Candidate Name, Validity Date, Payment Status, Insurance Category, Certification Number of IRDAI, Email Id, Mobile No, and COR Type.

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The system will display a confirmation screen. Please review all details carefully to ensure accuracy, then click **yes** to authorize the payment.

Renewal Online Training of Corporate Agents - Payment Confirmation	
Date : 23/09/2022	Order No : 82851022
Company Name	[REDACTED]
Email	[REDACTED]
Mobile	[REDACTED]
GSTIN Number	[REDACTED]
GSTIN State	Rajasthan
Payment Details	
Reference Id	1508
No Of Candidates	2
Payment for Training	1000.0
IGST	180.0
Grand Total	1180
You can make payment using your Credit/Debit card as well Internet Banking.	
Payment Charges	
Mode of Payment	Charges applicable
Internet Banking	Rs.12 per Transaction
Debit Card (Visa / Master)	1.00% of Transaction Amount (Minimum Rs.12/-)
Credit Card	1.50% of Transaction amount (Minimum Rs.12/-)
Amex/Diners card	3.00% of Transaction amount (Minimum Rs.12/-)
Wallet / Prepaid Card	Rs.12 per Transaction
Minimum Charges	All Charges subject to a minimum of Rs. 12/- per transaction.
Mobile wallets / Cash cards	For PayTM wallet : 2.00% of Customer Payment Amount For all others: 1.75% of Customer Payment Amount
UPI / UPI QR	NIL
I have read and understood the Help Manual available on website. I agree that decision of Ill in all the matters will be final and binding upon me.	
Please Confirm	
<input type="button" value="Yes"/> <input type="button" value="No"/>	