After 3 Year corporate agent should renew their candidate's licence. For Licience candidate has to complete 25 hours training. Below mentioned process is for **second time renewal** and **transfer candidates** from one company to another company. This process is applicable for Bulk registration.

Steps

- 1) Preparation of excel file.
- 2) Upload excel file for repayment
- 3) Payment

Step 1: Preparation of excel file

Preoare Excel sheet as per below mentioned format for Upload on portal.

- Excle file should be with below mentioned heading in capital letters.
- Sheet save in Microsoft Excel 97-2003 Worksheet
- Sheet Name Should be Sheet1

C12	\cdot : $\times \sqrt{f_x}$						
	А	В	С	D	E	F	G
1	PAN NUMBER	CERTIFICATION NUMBER	OLD CERTIFICATION	EMAIL ID	MOBILE		
2	ABCDE1234F	SP0012345678	SP1004567890	abc@gmail.com	9123456789		
3	FGHIJ7869K	SP0012345698	SP2004509876	xyz@gmail.com	6543219870		
4							
15							
16							
17	\frown						
	Sheet2		: [
READT					E		

Step 2: Upload excel file for repayment

IRDAI Examiantion - Corporate Agent - Renewal Online Training - Update Data Bulk Payment

🕅 Home About us	Examinations Exam F	Registration	IRDAI Examinations	Study	Material	Affiliates	Sitemap	Circulars	Personnel	Report			
	Online Pu	rchase of St	POSP/Insurance Agents		om 30.09	.2022 to 01	1.10.2022	22 "Applications i					
			Corporate Agent / IM	-			Importa	Int Informatio	n				
			/Web Aggregator WA				Drofes	sional Evamin	ation				
			Corporate Agents		Fresh On	line Training	sti	ration/Paper E	nrollment				
			Insurance Marketing	irm	Repayme	ent- Fresh Ti	raining	tional Cortific	tion in "Life 9				
			Web Aggregators		Renewal Online Training			Single Registration for					
		Insurance Brokers-		Report		F	Renewal Onli	ne Training					
	NT B B B B B B B B B B B B B B B B B B B						Updation	of E-Learni	'ng H	lelp-Single R	egistration		
		之, 1.1.5.2 的复数建筑管理器器的运动器构成			22. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1.			Status		F	lelp-Bulk Re	gistration	
	Welcome to Insurance I	nstitute of Inc	To create company pr	ofile	Flowchart and Circulars		ars T	To Update Email ID / Mo		е			
	The Insurance Institute of Ind	lia formerly know	Profile		Help Mar	nual for	i	n bulk					
	was established in the year 1	955, for the purp	Update GSTIN		Training/	'Exam/Web-	Wallet H	lelp Manual t	to update				
	education and training provide	er I.I.I. is closely	Broker Online Training	j -	Send Log	jin Details t	۱ ۵	1obile/Email	in Bulk				
	includes Insurance regulatory authority of indi		Fresher	Candida		Candidate		Upload Data Bulk Paym		\supset			
			Broker Online Training] -	Downloa	d Duplicate	Receipt P	ayment of B	ик кenewal				
	Academics	Even	Renewal		E Book I	C 38	H	lelp Manual-	Re-Renewal				
		A			(

Select the below mentioned option to upload Excel file for Re –renewaL (2nd time renewal after 3 years) transfer cases

Corporate Agent Online Renewa	l Training - File Upload Screen
Payment Type :*Select Select Type of In First Payment CA Renewal Online Training Repayment CA Renewal Online Training Repayment Fresh Online Training payment for CA Re-Renewal Online Training payment for CA Re-Renewal Transfer Bulk Online Training	Upload List of :*Select File : Choose File No file chosen Upload
Corporate Agent Online Renewa	al Training - File Upload Screen
Payment Type :* payment for CA Re-Renewal Transfer Bulk Online Training V Select Type of Intermediary :*Select V	Upload List of :* Details of Transfer Candidate ▼ File : Choose File Certification No of IRDAI URN Details of Transfer Candidate
Corporate Agent Online Renewa	l Training - File Upload Screen
Payment Type :* payment for CA Re-Renewal Transfer Bulk Online Training V Select Type of Intermediary :*Select Select Corporate Agent Point of Sales Person	Upload List of :* Details of Transfer Candidate File : Choose File No file chosen Upload

Below screen will appear. Click on Choose File for upload the excel file.

Corporate Agent Online Renewal Tra	iining - File Upload Screen
Payment Type :* payment for CA Re-Renewal Transfer Bulk Online Training 🗸	Unlead List of .* Details of Transfer Candidate V
Select Type of Intermediary :* Corporate Agent	File: Choose File No file chosen Upload

After choosing file – File name will appear on the screen. Then click on upload

Corporate Agent Online Renewal Training - File Upload Screen						
Payment Type :* payment for CA Re-Renewal Transfer Bulk Online Training Select Type of Intermediary :* Corporate Agent	Upload List of :* Details of Transfer Gandidate File : Choose File Transferupl ormat (1).xls Upload					

After uploading below message will show on screen

Corporate Agent Online Renewal Training - File Upload Screen						
Payment Type :* payment for CA Re-Renewal Transfer Bulk Online Training Select Type of Intermediary :* Corporate Agent	Upload List of :*Select V File : Choose File No file chosen Upload					
Total Records in File : 2 Records uploaded successfully : 2						
Please go to the option "Renewal Bulk Payment" and select filter "Validate Tra	inster Candidate" and try to validate CA re-renewal transfer case data					

Step 3 : Payment

IRDAI Examiantion - Corporate Agent - Renewal Online Training - Payment of Bulk Renewal



Select Validate Transfer Candidate option and click on search

Corporate Agents- Online Renewal Training						
Date Type:* Uploaded date	From Date : 23-09-2022 To Date*: 19-08-2023					
Status: * To Do Payment Select To Do Payment Fetch Data From IRDAI Payment Done	Pan No: COR: •ALL Certification No of PO/SP/AV: Sort By: * Uploaded Date					
Payment Restricted COR Validity Expired Uploaded List Details Incorrect Mobile/Email Uploaded - Incorrect Mobile/Email	Search Reset					
Validate Transfer Candidates	or PAN Numbers by Uploaded file to Process for the Payment Between 2022-09-23 00:00:00.0and 2023-08-19 23:59:59.0					

Records will show on screen click on Validate Transfer data

Corporate Agents- Online Renewal Training								
Date Type:* Uploaded date ✓ To Date*: 19-08-2023 III								
Status: * Validate Transfer Candidates V Pan No: COR:*ALL V								
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 I	Remark
		1				Re-Renewal Transfer Payment		
	~	2			-	Re-Renewal Transfer Payment		
				Validate Transfer Dat	a 🕽			
Select Service Provider Name *Select								
< First Page 1 >>>> Last Page								

After validating records below details will show on the screen

Corp	orate A	gents-	Online Renewal Training]						
										Ĩ
Date Typ	oe:* Uplo	aded da	ite 🗸	From Date*: 23-09-2022) 💷	To Date*: 19	-08-2023		
Status: *	Status: * Validate Transfer Candidates V Pan No: COR:4 ALL V									
Insuranc	e Categor	y:*	-ALL	Certification No of PO/SP/AV:			Sort By:* Uple	oaded Date	~	
				Search Rese	د]					
					_					
	Select	Sr. No	Certification Number of IRDAI	Old Certification Number of IRDAI	Pan No	Upload	і Туре	Eligibility	Remark	
		1				Re-Renewal Tra	ansfer Paymen	Eligible	No remarks)
	2 Re-Renewal Transfer Payment Eligible No remarks									
Select Service Provider Name *Select										
	<<<< First Page 1 >>>> Last Page									

Select option To do payment and click on search

	From Date*: 23-09-2022		To Date* 19	-08-2023		
s Type. Oproaded date	11011 Date . 23-03-2022		TO Date . 19	-00-2023		
us: * Validate Transfer Candidates	Pan No:		COR:*ALL-		~	
To Do Payment	Certification No of PO/SP/AV:		Sort By:* Uplo	oaded Date	• •	
Payment Done Payment Restricted COR Validity Expired Uploaded List Details	Search Reset	1				
Uploaded - Incorrect Mobile/Email Not Eligible Now for Payment Validate Transfer Candidates		_				
All Sr. No Certification Number of	of IRDAI Old Certification Number of IRDAI	Pan No Uploa	d Type	Eligibility	Remark	
1		Re-Renewal Tr	ansfer Payment	Eligible	No remarks	
2	N N	Re-Renewal Tr	ansfer Payment	Eligible	No remarks	
	Validate Transfer Da	ta				
lect Service Provider Name *Select V						
<<<< First Page <u>1</u> >>>> Last Page						

Below screen will appear select the option as mentioned in the Screen shot and click on the Go to Payment

Corporate Agents- Online Renewa	al Training					
Date Type:* Uploaded date	From Date	a : 23-09-2022		To Date*: 19-08-2023		
Status: * To Do Payment	Pan No:			COR:*ALL		
Insurance Category:*ALL	✓ Certificati	on No of PO/SP/AV:		Sort By:* Uploaded Date	~	
Activity Type:* O To Update Date 💿 To Make	Payment					
		Search Reset				
Select All Sr. No Candidate Name Pan No	Validity Date Payment Status	Insurance Category	Certification Number of IRDAI	Email Id	Mobi	ile No COR Typ
	17-10-2022 To Do Payment	Composite Insurance				Specified Pe
	In Do Faymon			ju -		opeched re
Please select the mode of payment:		O Web Wallet				
STIN No.:	\mathcal{I}					
Link to set GSTIN					\subset	Go To Payment
						< First Page 1 >>>> Last Page

It will provide you screen for Payment Confirmation. Check the details and click on Yes.

Renewal Online Training of Corporate Agents - Payment Confirmation						
Date : 23/09/2022	Order No : 82851022					
Company Name						
Email						
Mobile						
GSTIN Number						
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 p	You can make payment using your Credit/Debit card as well Internet Banking.					
	Payment Charges					
Mode of Payment	Charges applicable					
Internet Banking R	s.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	s.12 per Transaction					
Minimum Charges A	I Charges subject to a minimum of Rs. 12/- per transaction.					
Mobile wallets / Cash cards	or PayTM wallet : 2.00% of Customer Payment Amount or all others: 1.75% of Customer Payment Amount					
UPI / UPI QR N	L					
I have read and understood the Help Manual available on website. I agree that decision of III in all the matters will be final and binding upon me.						
I have read and understood the Help Manual available on website. I agree that decision of III in all the matters will be final and binding upon me. Please Confirm Yes No						

After payment done successfully receipt will generate.