

Help Manual for Renewal Online Training – Bulk Payment For Corporate Agents

Following are the steps to make bulk payment for Renewal Online Training.

Step 1.

visit our website www.insuranceinstituteofindia.com

Later, go to IRDAI Examination → Corporate Agent → Renewal Online Training → Upload Certification No./Pan No.

The screen will be appear as follows,

The screenshot shows the website interface for the Insurance Institute of India. The browser address bar displays <https://www.insuranceinstituteofindia.com/web/guest>. A warning message at the top states: "Warning! Due to inactivity, your session has expired. Please save any data you may have entered before refreshing the page." The website header includes the logo and name of the Insurance Institute of India, a search bar, and a "Sign Out" link. The main navigation menu is visible, with "IRDAI Examinations" selected. A dropdown menu is open under "IRDAI Examinations", showing options like "Syllabus", "IC38 Study Material", "Insurance Agents", "Corporate Agents", "Insurance Marketing Firm", "Web Aggregators", "Insurance Brokers-Authorised Verifiers", "Web Wallet", "Insurance Marketing Firm -IMF (Old Candidates)", "Broker Online Training - Fresher", "Broker Online Training -Renewal", "Surveyors Exam", "Help to clear Browser", "History", "Post Graduate Diplo Health Insurance (P", "Post Graduate Diplo Insurance Marketing (PGDIM)", and "(In collaboration with". A callout box with a blue arrow points to the "Renewal Online Training" option in the dropdown menu, containing the text: "IRDA Examination --- Corporate Agent – Renewal Online Training – Upload certification no. / Pan No." The footer of the browser shows the Windows taskbar with the search bar and system tray icons, including the date and time "02:50 04/Oct/2018".

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Step 2.

Under “Upload List Of” two options are available,

The format for file will be (.XLS – Excel 97-2000 Workbok) and column heading will be as follows in excel file

1. **Certification No. Of IRDAI** -> Certification No, Activity
2. **Pan Numbers.** -> PAN Number, COR Type, Insurance Category, Activity

Activity will be “P” or “D”

1. P stands for “Upload with ‘P’ activity”. -> To make the payment
2. D stands for “Upload with ‘D’ activity”. -> To Restrict/Deactivate for the payment

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The screenshot displays the 'Corporate Agent Online Renewal Training - File Upload Screen' on the Insurance Institute of India website. The page features a navigation menu with options like Home, About us, Examinations, IRDAI Examinations, Study Material, Affiliates, Placement Services, Help Desk, Contact us, FAQs, and Sitemap. A search bar is located at the top right. The main content area shows a file upload interface with a dropdown menu for 'Upload List of' containing 'Certification No of IRDAI' and 'PAN Numbers'. A 'File' field with a 'Choose File' button and 'No file chosen' text is present, along with an 'Upload' button. Annotations include: a box pointing to the 'Upload' button with the text 'Click on Upload Button'; a box pointing to the dropdown menu with the text 'Data can be upload by any option. i.e. 1. Certification No. Of IRDAI OR 2. Pan Numbers.'; and a box pointing to the 'File' field with the text 'Choose the respective file to upload the data. File must be in Excel and .xls format only. The extension of file will be ".xls" format only. Excel file can be saved in "Excel 97-2003 Workbook".' The Windows taskbar at the bottom shows the time as 11:24 AM on 05-Oct-2018.

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Step: 3

The excel file must have in below format if data uploaded by using option “Certification No. Of IRDAI”

The screenshot shows an Excel spreadsheet with the following data:

CERTIFICATION NUMBER	ACTIVITY
SP0010000000	P
SP001	P

Annotations:

- A blue arrow points from the 'ACTIVITY' column header to a text box: "Insurance Institute Of India provides 2 types of facilities under 'Activity' column i.e. P or D. P stands for 'Upload with 'P' activity'. -> TO make the payment D stands for 'Upload with 'D' activity'. -> To Restrict/Deactivate for the payment".
- A blue arrow points from the 'CERTIFICATION NUMBER' column header to a text box: "Please insert candidate certification number.".

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Step: 4

The excel file must have in below format if data uploaded by using option “Pan Number”

UploadFilePAN01 [Compatibility Mode] - Excel

	A	B	C	D	E
1	PAN NUMBER	COR TYPE	INSURANCE CATEGORY	ACTIVITY	
2	XXXXXXXXXX	SP	L	P	
3	XXXXXXXXXX	SP	L	P	
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
21					
22					
23					
24					

COR Type can be 3 types,

1. SP – Specified Person
2. PO – Presiding Officer
3. AV – Authorized Verifier

Insurance Category can be 4 types,

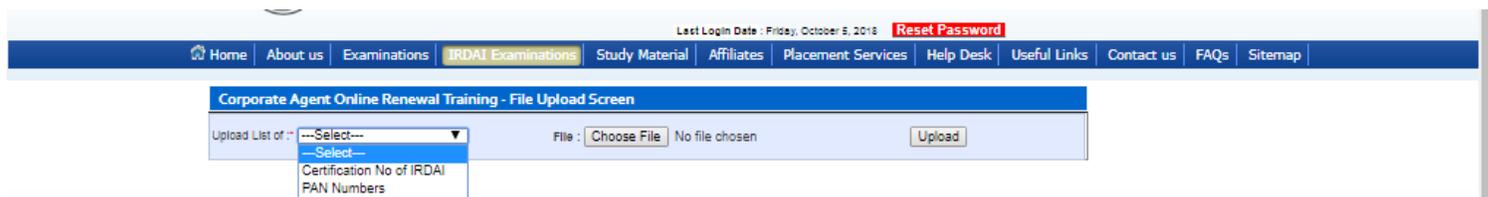
1. L – Life
2. G – General
3. H – Health
4. C - Composite

Insurance Institute Of India provides 2 types of facilities under “Activity” column i.e. P or D.

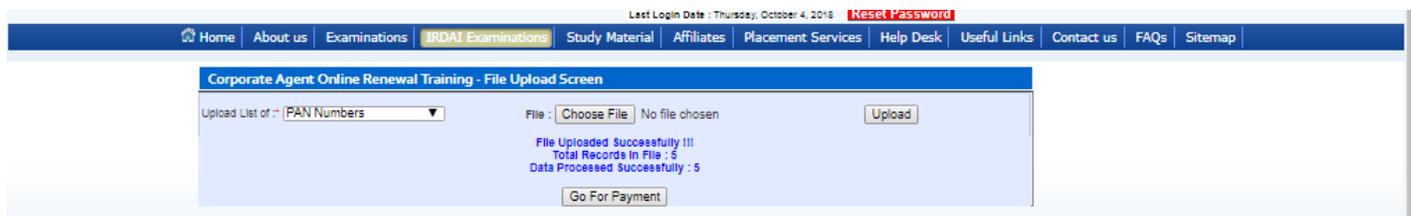
P stands for “Upload with ‘P’ activity”. -> TO make the payment

D stands for “Upload with ‘D’ activity”. -> To Restrict/Deactivate for the payment

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Step 5. -> After successfully uploading the data, the screen will be appear as follows.



After uploading the data using “Certification No or PAN No”, the data will be available in the screen “**Renewal Training- Bulk Payment**” option .

If the data is uploaded with “P” activity , it will be available under “To Do Payment” status. But if the system could not find Email ID and Mobile No in proper format, the system will recongnise it and will show under the status “Incorrect Email ID/Mobile No”. If you update Email ID and Mobile No under the status “Incorrect Email ID/Mobile No”, the system itself will change the status to “To do Payment” and will be available under “To do payment” status.

Before making the payment, please ensure that Email ID and Mobile Number are correct as the system will send AUTO-MAIL and SMS regarding training details.

Status	Meaning
To Do Payment	The payment can be done. (please ensure that Email ID and Mobile Number are correct). You can select 1000 Candidates at the same time to make the payment.
Payment Done	List of candidates for which payment is done. It will show the status “E-Learning status-Success/Failure” i.e. Training is assigned to the candidate or not.
Payment Restricted	Please ignore this status. Because it will be properly work after 31 st December,2018.
COR Validity Expired	List of the Candidates - Renewal Training validity period is over.
Upload List Details	You can view the details which are uploaded by you using the option “Certification No/PAN No”
Incorrect Email ID/Mobile	List data of the candidates for which correction is required in Email ID or Mobile No field