

CHUBB®

AGENT PORTAL
ONLINE PLATFORM USER GUIDE
網上投保系統使用說明
02/2026

Products 產品:

- Chubb Travelwell Protection Plan 安達旅遊保險
- Chubb Travelwell Annual Protection Plan 安達全年旅遊保險
- Overseas Education Protection 海外教育保障計劃

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Access Agent Portal from OneHub

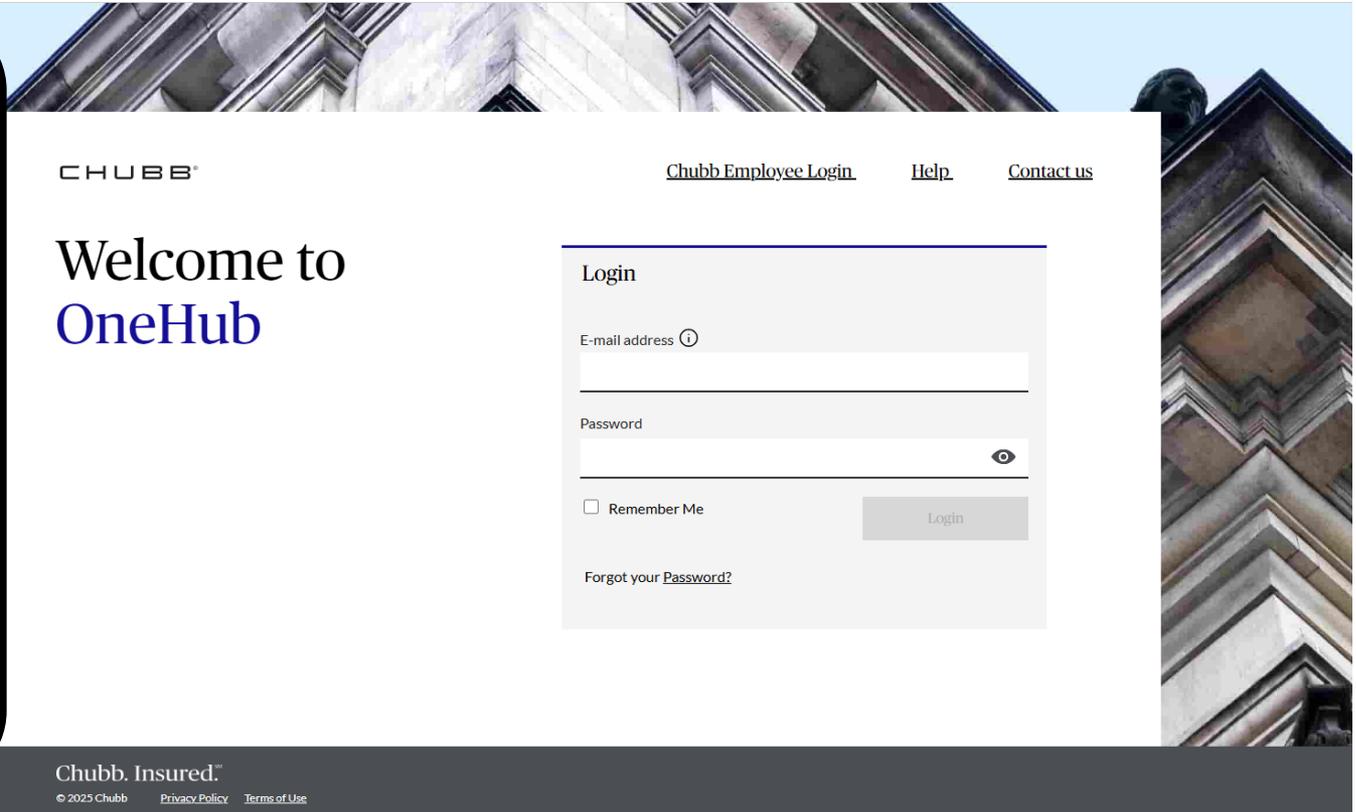
由OneHub進入Agent Portal

This is the cover page of OneHub.

1. You will receive the login URL in your welcome email from Chubb
2. Tip: Bookmark URL for easy access in the future.

<https://hub.apac.chubb.com/site/hk>

3. Once your login credentials are authenticated, you will be redirected to Home Page.
4. For new users – Click 'Forgot Password' and follow the process.



CHUBB®

[Chubb Employee Login](#) [Help](#) [Contact us](#)

Welcome to OneHub

Login

E-mail address ⓘ

Password

Remember Me

[Forgot your Password?](#)

Chubb. Insured.™

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Access Agent Portal from OneHub 由OneHub進入Agent Portal

Click on Products.
點擊產品。

CHUBB® OneHub

Home Products Quote Policy Support | Henry Wong ▾

Products

Accident & Health (1)



ACCIDENT & HEALTH

Leisure Travel

New Quote [↗](#)

Then click here.
然後按此。

IPL (1)



Language Setting

語言設置

AGENTPORTAL

Home > Settings

PREFERENCE SETTINGS

Language, Region & Timezone | Misc

Language: English (US) ▼

Timezone: (UTC+08:00) Kuala Lumpur, Singapore ▼

English (US)
Chinese (Traditional, Hong Kong S.A.R.)
Portuguese - Brazil
Japanese

Date Format: 27/03/2025
Time Format: 3:48:11 pm
Number Format: 1,234,567.89

Save

Main menu icons: WB, Main, Home, Plus, Search, Document, Print, Refresh, Other, Gear (Settings), Power

Please click here.
請按此。

You can select your preferred language by clicking on the "Settings" icon in the main menu.

您可以透過點擊主選單中的「設定」圖示來選擇您的首選語言。

Emergency Arrangement

緊急情況處理

- In the event of an emergency or if you're unable to access the system to issue a policy, please email the IDP Team/Travel Team with the information detailed below for HOLD COVER. Once conditions return to normal, please issue the policy and inform us so we can process the endorsement.
- 假若閣下在任何情況下未能登入系統而有保單急於處理，請將以下資料電郵給IDP Team / Travel Team 同事作HOLD COVER之用。當閣下能重新登入系統後，請如常在系統內投保保單，完成後請聯絡 IDP Team / Travel Team 同事以為保單作出所需之Endorsement。
- Travel Date (Start/End) 旅遊日期
- Travel Destination(s) 旅遊國家
- Plan Name and Plan Type 計劃名稱及類別
- Full Name of Insured(s), Date of Birth, ID No. 受保人全名、出生日期及證件號碼

New Quote 索取報價 / Issue Policy 投保保單

New Quote 索取報價 / Issue Policy 投保保單

The screenshot displays the Chubb Agent Portal interface. At the top, there is a search bar for 'Policy No.' and 'Search by Policy Certificate Number'. Below this, a welcome message reads 'Welcome to AGENTPORTAL' and 'Good Morning, Winnie BR. How can we help you today?'. A prominent blue button labeled 'New Quote' is visible, which has opened a dropdown menu. The menu lists three product options: 'HK Chubb TravelWell Annual Protection Plan', 'HK Chubb TravelWell Protection Plan', and 'Overseas Education Protection'. A red circle highlights the 'New Quote' button in the left-hand navigation menu. A callout box points to the dropdown menu with the text: 'Please click and select the Product. 按下並選擇所需產品。' Below the main content area, there is a 'What's new' section with a date '05/01/2024' and the message 'Welcome to the Agent Portal for Travel.'

New Quote 索取報價 / Issue Policy 投保保單

AGENTPORTAL
Home > New Policy
CREATE NEW POLICY

1. Travel Details 2. Select Plan 3. Add-on 4. Personal Details 5. Declaration & Payment

HK Chubb TravelWell Protection Plan

Your Travel Details

- Trip Type: Single
- Trip Duration: 28/03/2025 - 01/04/2025 (5 days)
- Cover Type: Individual
- Promo Code: --

Where are you traveling?

Travel Start Date: 28/03/2025 | Travel End Date: 01/04/2025 | Total Days: 5

Country of Origin: Hong Kong

Country of destination: Japan

Policy Type: Personal Organisation

Who are you traveling with?

Cover Type: Individual

No. of Insured (Aged 0-64): 1 | No. of Insured (Aged 65-79):

Promo Code: [] [Apply]

[Next Step]

System Default.
系統自動顯示。

Select the destination, and the system will display the appropriate premium.
請選擇目的地，系統會自動配對所屬區域（亞太/環球），以計算出正確保費。

Choose cover type
輸入保障類型。

Select the number of insured within the appropriate age group.
請於年齡組別點選受保人數目。

Input Promo Code (if appropriate)
輸入促銷代碼（如適用）。

Then press “Next Step”
然後按 “下一步”。

New Quote 索取報價 / Issue Policy 投保保單

AGENTPORTAL

Home > New Policy

1. Travel Details 2. Select Plan 3. Add-on 4. Personal Details 5. Declaration & Payment

HK Chubb TravelWell Protection Plan

Your Travel Details

Trip Type
SINGLE

Trip Duration
28/03/2025 - 01/04/2025 (5 days)

Region
Asia

Cover Type
Individual

Show all

Premier Plan

Base Premium HK\$ 263.74

Taxes
Levy HK\$ 0.26

Total Premium HK\$ 264.00

Discounted Amount HK\$ 0.00

Your Plan Selections

Premier Plan HK\$ 264.00
Selected
Quote Number: QOTAA002224

Smart Plan HK\$ 189.00
Select

Cruise Worldwide HK\$ 612.00
Select

Cruise Asia HK\$ 428.00
Select

Create Quote Confirmation

Back Next Step

Select Plan, then press "Create Quote Confirmation".
揀選計劃類別，然後按 "儲存報價紀錄"。
And you can see the "Quote Number" as above and the quote number will valid before the departure date.
您可以看到上面的 "Quote Number"，此價單號在出發日期之前有效。

Or you can simply press "Next Step" to create the new policy directly.
或您可以直接按 "下一步" 建立新保單。

New Quote 索取報價 / Issue Policy 投保保單

HK Chubb TravelWell Protection Plan

Your Travel Details

Trip Type
SINGLE

Trip Duration
01/01/2025 - 01/08/2025 (8 days)

Region
Asia

Cover Type
Individual

Show all

Smart Plan

Base Premium HK\$ 269.73

Taxes
Levy HK\$ 0.27

Total Premium HK\$ 270.00
Discounted Amount HK\$ 0.00
Voucher Amount HK\$ 0.00

Policy

Promo Code Voucher Code

Campaign Code Member ID

Fulfillment

Delivered Via
 Email To Applicant
 Email To Agent

Trip Details

Start Date End Date Total Days 8

Policy Type
 Personal Organisation

Applicant Details

Title

Surname * Given Name *

HKID/Passport No *
Identity Card * Date Of Birth *

Same as policyholder
 Yes No

Insured Persons

Title	Surname	Given Name	Doc. Type	HKID/Passport No	Relationship	Date Of Birth	Action
Mr	test	test	Identity Card	A1234563	Policyholder	12/25/2000	

[Add Traveler](#)

Voucher Amount HK\$ 0.00

Applicant Contact Details

Address Line 1

Address Line 2

Address Line 3

Postal Code

Telephone Mobile

Email

Please input the necessary information and press "Next Step".

請輸入必要的資料並按“下一步”。

New Quote 索取報價 / Issue Policy 投保保單

AGENTPORTAL

Home > New Policy

CREATE NEW POLICY

1. Travel Details 2. Select Plan 3. Add-on 4. Personal Details 5. Declaration & Payment

HK Chubb TravelWell Protection Plan

Your Travel Details

Trip Type
SINGLE

Trip Duration
28/03/2025 - 01/04/2025 (5 days)

Region
Asia

Cover Type
Individual

Show all

Premier Plan

Base Premium	HK\$ 263.74
Taxes	
Levy	HK\$ 0.26
Total Premium	HK\$ 264.00
Discounted Amount	HK\$ 0.00
Voucher Amount	HK\$ 0.00

Applicant Details

Title
Mr

Surname
Testing

Payment Details

Payment Method *
Credit Term

Back Confirm

Contact Details

Surname
Testing

Given Name
Test

HKID/Passport No
A1234563

Date Of Birth
25/12/2000

Address Line 1
--

Address Line 2
--

Address Line 3
--

Postal Code
--

Telephone

Mobile
(+852) 66031136

Email
christine.chan@chubb.com

Show all Insured Persons (1)

Please check the application information and press "Confirm".
請核對投保資料並按「確認」。

New Quote 索取報價 / Issue Policy 投保保單

AGENTPORTAL

Home > Search > CTSPDAA0001

CTSPDAA0001 Accepted

General

Address: C/O Chubb Hong Kong Branch - Testing Purpose
 Policy Code: ---
 Under Policy No: COTW12345
 Issued By: Winnie BE
 Issued Date: 24/02/2023
 Updated By: Winnie BE
 Updated Date: 24/02/2023
 Issue Code: InjAccIDC

Policy

Policy Effective Date: 28/02/2023
 Policy Expiry Date: 01/04/2023
 Product: HK Chubb TravelWell Protection Plan
 Plan: Protector Plan
 Region: Asia
 Cover Type: Individual
 Home Code: ---
 Currency Code: ---

Trip Details

Start Date: 28/02/2023
 End Date: 01/04/2023
 Country of destination: Japan

Applicant Details

The: Mr.
 Name: Testing Test
 HKID Passport No: A1234567890123456
 Date Of Birth: 28/12/1980

Insured Persons

Surname	Given Name	Relationship	HKID/Passport No	Date Of Birth
Testing	Test	Policyowner	A123456	28/12/1980

Applicant Contact Details

Address: ---
 Telephone: (852) 44881116
 Email: chubb.hk@chubb.com

Premium Details

Type/Premium	HK\$	USD/20
Top Premium	HK\$ 0.00	USD 0.00
Top Tax	HK\$ 0.00	USD 0.00
Disbursement amount	HK\$ 0.00	USD 0.00
Number amount	HK\$ 0.00	USD 0.00

[EXTERNAL] Your Chubb TravelWell Protection Plan Confirmation No.CTSPDAA0001 from Chubb

Chubb Travel Insurance <donotreply@email.chubbtravelins.c>
 To CHAN, Christine
 Mon 2

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

P_CTSPDAA0001.pdf
 368 KB

Translate message to English Never translate from: Chinese Traditional Translation preferences



Dear Customer,

Thank you for choosing Chubb TravelWell Protection Plan. This extensive cover provides you with a better overseas protection and help make your holidays more enjoyable.

Please download the Policy Wording of Chubb TravelWell Protection Plan via the below link and read and retain both the downloaded Policy Wording and the attached Policy Schedule. Your coverage is subject to the listed terms and conditions of the policy. Please contact us if you experience any issues downloading/receiving the Policy Wording and/or Policy Schedule.

Link: [Policy Wording](#)

Should you have any queries, please do not hesitate to contact our Chubb Insurance Helpline at 852 44881116 during office hours 9 am to 5 pm on 21 days from Monday to Friday (Closed on Saturdays, Sundays and Public Holidays). You can also contact us via email at geninfo@chubb.com.

We hope you have a pleasant journey!

Yours sincerely,

Chubb Insurance Hong Kong Limited

親愛的客戶：

恭喜您投保「香港旅遊保險」，為您提供為您提供最全面、最完善的海外旅遊保障，令您可以盡享愉快的假期。本保險計劃詳情：

請您透過以下連結下載「香港旅遊保險」的保單條款，並細閱及保留保單條款及附屬的保單格式及附屬的表格。您的保單保障將受保單條款及表格的約束。如閣下在下载保單條款或保單格式時遇到任何問題，請聯絡我們的客戶服務熱線。

連結： [保單條款](#)

如有任何查詢，歡迎向我們的客戶服務熱線（星期一至星期五，每日上午九時至下午五時）或電郵至 geninfo@chubb.com 聯絡我們。

我們希望您有一段愉快的旅程！

此致，

香港保險管理有限公司

Policy issuance has been completed, and a confirmation email will be sent to the designated email address.

保單簽發已完成，確認郵件將寄送至指定電郵地址。

SEARCH POLICY

(To retrieve issued policies)

保單查詢 (可查詢曾發出過之保單)

SEARCH POLICY (To retrieve issued policies) 保單查詢 (可查詢曾發出過之保單)

The screenshot displays the AGENTPORTAL search interface. On the left, the homepage search bar is highlighted with a red box, showing search options: Policy No., Policy Keyword Search, and Quote Keyword Search. A red circle highlights the search icon. On the right, the search results page is shown, with the search bar and dropdown menu also highlighted with a red box. The search results for policy number CTSPDAA0001 are displayed, including details such as Product (HK Chubb TravelWell Protection Plan), Plan (Premier Plan), Travel Period (28/03/2025 - 01/04/2025), and Policyholder (Test Testing). The status is 'Accepted'.

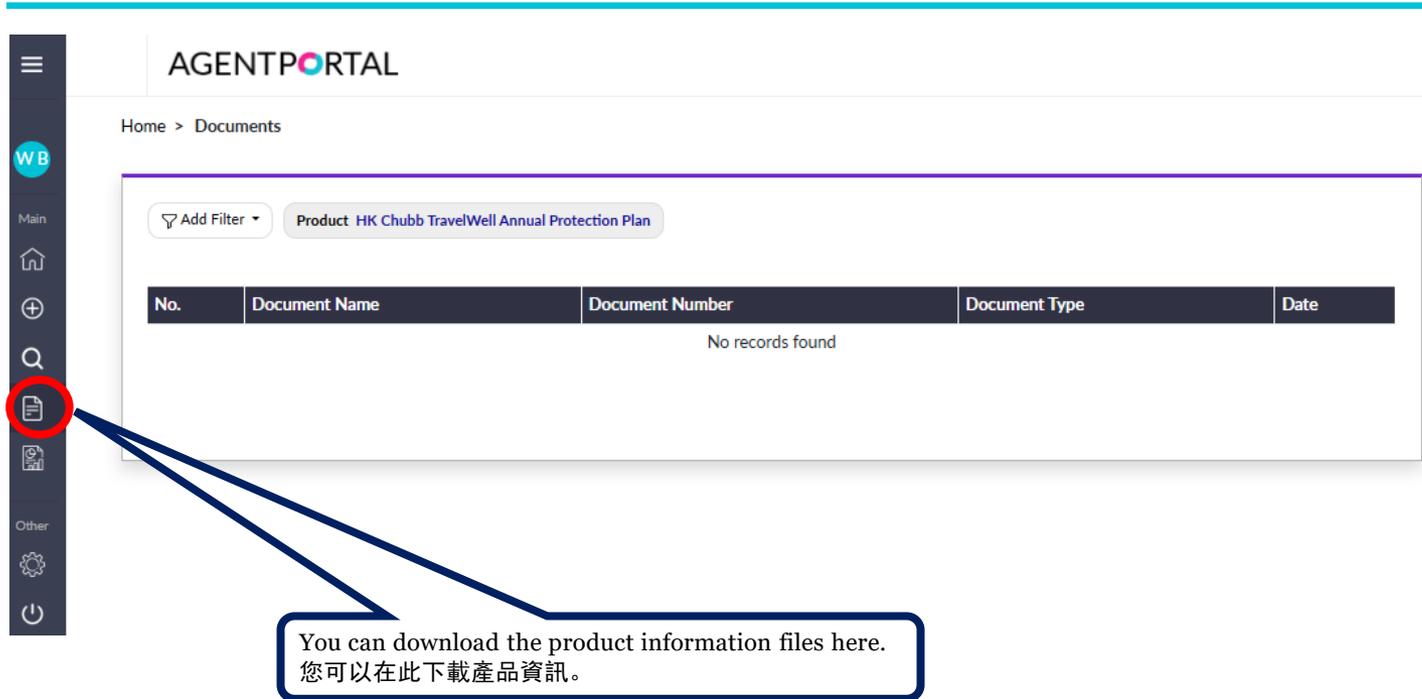
You can search for policies from either the homepage or the search page by using the Policy No., Policy Keyword Search, or Quote Keyword Search. Just enter the necessary information and click “search (🔍)” to retrieve the quote or policy.

您可以使用保單號碼、保單關鍵字或報價關鍵字從主頁或搜尋頁面搜尋保單。只需輸入必要的資訊並點擊“搜尋 (🔍)”即可檢索報價或保單。

Download Product information files 下載索取產品資料

Download Product information files

下載索取產品資料



The screenshot displays the AGENTPORTAL interface. On the left is a vertical sidebar with a menu icon at the top, followed by a user profile icon labeled 'WB', and a 'Main' section containing icons for Home, Add, Search, and a document icon (circled in red). Below these are 'Other' settings and a power icon. The main content area shows the breadcrumb 'Home > Documents', a filter dropdown set to 'Product HK Chubb TravelWell Annual Protection Plan', and a table with the following structure:

No.	Document Name	Document Number	Document Type	Date
No records found				

A callout box with a blue border and white background points to the red-circled document icon in the sidebar. The callout contains the text: 'You can download the product information files here. 您可以在此下載產品資訊。'

Download Product information files 下載索取產品資料

The screenshot shows the AGENTPORTAL interface. On the left is a vertical navigation menu with icons for Home, Search, and Other. The main content area is titled 'AGENTPORTAL' and 'Home > Documents'. A filter dialog box is open, showing a dropdown menu for 'Product' with 'HK Chubb TravelWell Annual Protection Plan' selected. Below the dropdown is an 'Apply' button. A blue callout box with a white background and a blue border points to the 'Apply' button, containing the text: 'Choose the product, then press “Apply”.' and '選擇產品，然後按“確認”。'. Below the dialog box, a table of documents is displayed. The table has columns for 'No.', 'Document Name', 'Document Number', 'Document Type', and 'Date'. The table contains 7 rows of data. A blue arrow points from the 'Apply' button to the table.

AGENTPORTAL

Home > Documents

Product: HK Chubb TravelWell Annual Protection Plan

No. Document Name Document Number Document Type

Value: HK Chubb TravelWell Annual Protection Plan

Cancel Apply

Choose the product, then press “Apply”.
選擇產品，然後按“確認”。

AGENTPORTAL

Home > Documents

Product: HK Chubb TravelWell Protection Plan

No.	Document Name	Document Number	Document Type	Date
1	PolicyWording	127197840	Policy Wording	12/12/2022
2	HKTPTS Policy Wording YUU org	127167652	Policy Wording	04/02/2024
3	HKTPTS SOB	127424897	Benefit Schedule	07/03/2024
4	HKTPTS SOB - YUU	127424923	Benefit Schedule	07/03/2024
5	HKTPTS SOB - PCRAS	127424906	Benefit Schedule	07/03/2024
6	HKTPTS SOB - PCRWW	127424906	Benefit Schedule	07/03/2024
7	HKTPTS Brochure	127746297	Brochure	08/11/2024

1

Copy Policy 保單複製

Copy Policy 保單複製

AGENTPORTAL

Home > Search > CTSPDAA3408

CTSPDAA3408 Accepted

General

Account	CHUBB Hong Kong (Broker)	Producer Code	--
Master Policy No.	CTTW530073		
Issued By	Anu Broker	Modified Date	11/12/2024
Updated By	Anu Broker	Enrollment Date	11/12/2024
Source System	Web		

First search the Policy No. and enter to the product page, then press “Copy Policy” from the right corner menu (:).

首先搜尋保單，然後按右上角選單 (:) 中的「複製保單」。

Endorse Policy 保單修改

Endorse Policy 保單修改

The image shows a two-step process for endorsing a policy. The first step is a screenshot of the policy details page for CTSPDAA3418. A dropdown menu is open, with 'Endorsement' highlighted. The second step is a screenshot of the 'ENDORSE POLICY' dialog box, where the 'Default' option is selected in the 'Endorsement Item' dropdown.

Home > Search > CTSPDAA3418

CTSPDAA3418 | Accepted

General

Account	CHUBB Hong Kong (Broker)	Producer Code	--
Master Policy No.	CTTWS30073	Issued By	Winnie BR
Issued By	Winnie BR	Modified Date	11/22/2024
Updated By	Winnie BR	Enrollment Date	11/22/2024
Source System	InternalB2B		

Policy

Policy Effective Date	12/01/2024	Policy Expiry Date	12/01/2024
Product	HK Chubb TravelWell Protection Plan	Plan	Premier Plan
Region	Worldwide	Cover Type	Individual
Promo Code	--	Voucher Code	--
Campaign Code	--	Member ID	--

Manage Documents

- Endorsement
- Cancellation
- Copy Policy
- Resend Fulfillment
- Payment Details

Search the Policy, then click "Endorsement" in the menu located at the right corner, update the required information, and double check the policy information.

首先搜尋保單，然後按右上角選單中的「修改保單」，更新及確認保單內容。

ENDORSE POLICY

Endorsement Effective Date*

28/03/2025

Endorsement Item*

- Default
- Default
- CANCEL
- PROCEED

By clicking "Default" and press "Proceed" to continue.

按一下 "Default" 並按 "繼續" 到下一頁。

Endorse Policy 保單修改

AGENTPORTAL
Home > CTPDAA0001 > Endorsement

1. Policy Details 2. Declaration & Payment

Endorsement

Your Travel Details

Trip Duration: 24/03/2025 - 27/07/2025 (5 days)

Region: Asia

Cover Type: Individual

Promo Code: --

Policy

Plan: Premier Plan

Country of destination: South Korea

Cover Type: Individual

Promo Code: --

Member ID: --

Premium Plan

Original Premium: HK\$ 1,540.00

Revised Premium: HK\$ 1,540.00

New Premium: HK\$ 1,547.05

Trav. Levy: HK\$ 1.85

Total Premium: HK\$ 1,540.00

Discounted Amount: HK\$ 0.00

Voucher Amount: HK\$ 0.00

Applicant Details

Title: Mrs

Company: CHUBB

MIB Report No: --

Identity Card: K1224503

Date of Birth: 04/02/1970

Consent as policyholder: Yes

Insured Persons

Name	Summary	Email Name	Sex	Type	MIB	Report No	Residency	Date of Birth	Linker
Mrs. Chub	Chub	Chub	Female	Individual	US	12345678	Permanence	04/02/1970	Linker

Applicant Contact Details

Address Line 1: --

Address Line 2: --

Address Line 3: --

Postal Code: --

Telephone: --

Mobile: --

Email: jackson@chubb.com

Back Send Endorsement

Update the required information, and double check the policy information, then press "Confirm".

更新所需信息，並仔細檢查保單內容，然後按“確認”。

AGENTPORTAL
Home > CTPDAA0001 > Endorsement

ENDORSE POLICY

1. Personal Details 2. Declaration & Payment

HK Chubb TravelWell Protection Plan

Your Travel Details

Trip Duration: 28/03/2025 - 01/04/2025 (5 days)

Region: Asia

Cover Type: Individual

Promo Code: --

Endorsement / Amendment

Reason for Endorsement / Amendment *

Back Confirm

Before clicking "Confirm", please provide the endorsement reason by filling in this box.

在點擊「確認」前，請提供保單修改原因於此位置。

Cancel Policy 取消保單

Cancel Policy 取消保單

Home > Search > CTSPDAA3418

CTSPDAA3418 Accepted

General

Account CHUBB Hong Kong (Broker)	Producer Code ---
Master Policy No. CTW530073	
Issued By Winie BR	Modified Date 11/22/2024
Updated By Winie BR	Enrollment Date 11/22/2024
Source System InternalB2B	

Policy

Policy Effective Date 12/01/2024	Policy Expiry Date 12/01/2024
Product HK Chubb TravelWell Protection Plan	Plan Premier Plan
Region Worldwide	Cover Type Individual
Promo Code ---	Voucher Code ---
Campaign Code ---	Member ID ---

Manage Documents

- Endorsement
- Cancellation**
- Copy Policy
- Resend Fulfillment
- Payment Details

Search the Policy, then select "Cancellation" from the menu in the right corner. Enter the required information, click "Next," and then select "Cancel Policy".

首先搜尋保單，然後從右上角的選單中選擇「取消保單」。輸入所需信息，按一下「下一步」，然後選擇「取消保單」。

Home > Search > CTADAA0353 > Cancellation

HK Chubb TravelWell Annual Protection Plan

Cancellation

Cancellation By*
Insured

Type of Refund*
Full Refund

Reason

Back Next

AGENTPORTAL

Home > Search > CTSPDAA0001 > Cancellation

HK Chubb TravelWell Protection Plan

Cancellation

Premium: HK\$ 264.00
Refund: -HK\$ 264.00
Balance: HK\$ 0.00

Back Cancel Policy

Please select Cancellation By - "Insured", Type of Refund as "Full Refund".

請選擇 取消源由為 "Insured". Type of Refund 為 "Full Refund".

Before clicking "Next", please provide the cancellation reason by filling in this box.

在點擊 "確認" 前，請提供保單取消原因於此位置。

Confirm the refund amount and press "Cancel Policy".

確認退款金額後，請按 "取消保單"。

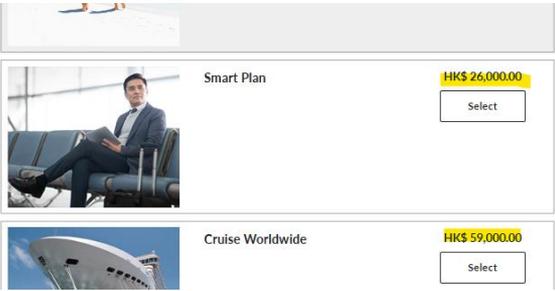
Bulk Purchase Function

團體購買

Bulk Purchase Function 團體購買

Bulk Purchase Function Overview 團體購買概述:

- **Product 產品** : HK Chubb Travelwell Production Plan (Single Plan Only 只適用於單次旅遊)
- **Maximum Pax 人數上限**: 200 individuals 位客人

Steps 步驟:	Image 圖像:
<p>1. Input Number of Insured 輸入受保人人數:</p> <p>On the “Travel Detail” page, user inputs the no. of insured when creating a new policy. 在「旅遊計劃詳情」頁面，建立新保單時輸入受保人人數。</p>	
<p>2. Premium Calculation 保費計算 :</p> <p>System automatically calculates the total premium. 系統自動計算總保費。</p>	

Bulk Purchase Function 團體購買

Steps 步驟:

3. Download Bulk Upload Template 下載團體投保表格:

On the “Personal Detail” page, click the “Download Bulk Upload Template” button to generate an Excel template.

在「個人資料」頁面，點選「下載團體投保表格」按鈕，下載Excel表格。

4. Input Client Details 輸入客戶資料:

Fill in the client details in the downloaded Excel template.

在下載的 Excel表格中填寫客戶資料。

Image 圖像:

Insured Persons

Title	Surname	Given Name	Doc. Type	HKID/Passport No	Relationship	Date Of Birth	Action
			Identity Card		Policyholder		

[Add Traveler](#) [Download bulk upload template](#) [Upload bulk upload template](#) [Clear all input](#)

Title	Surname	Given Name	Doc. Type	HKID/Passport No	Relationship	Date Of Birth
Ms	Wang	January	IdentityCard	N7777777	Travel Companion	1/1/1990
Mrs	Li	February	IdentityCard	A1234563	Travel Companion	1/1/1990
Mr	Zhang	March	Passport	Ads11111	Travel Companion	1/1/2010
Ms	Liu	April	Passport	Ads11112	Travel Companion	1/2/2010
Mrs	Chen	May	Passport	Ads11113	Travel Companion	1/3/2010
Mr	Yang	June	Passport	Ads11114	Travel Companion	1/4/2010
Ms	Huang	July	Passport	Ads11115	Travel Companion	1/5/2010
Mrs	Zhao	August	Passport	Ads11116	Travel Companion	1/6/2010
Mr	Wu	September	Passport	Ads11117	Travel Companion	1/7/2010
Ms	Zhou	October	Passport	Ads11118	Travel Companion	1/8/2010
Ms	Zhou	November	Passport	Ads11119	Travel Companion	1/9/2010
Mr	Wu	December	Passport	Ads11120	Travel Companion	1/10/2010

Bulk Purchase Function 團體購買

Steps 步驟:

5. Upload Template 上傳表格:

Use the "Upload Bulk Upload Template" button to upload the completed Excel file.
使用「上傳團體投保表格」按鈕上傳已完成的 Excel 檔案。

6. Automatic Data Upload 資料自動上傳:

The system will automatically upload the data. Confirm the client details and complete the payment process, similar to the general new policy binding procedure.
系統會自動上傳資料，確認客戶資料並完成付款，與一般新保單投保流程相似。

Image 圖像:

Insured Persons

Title	Surname	Given Name	Doc. Type	HKID/Passport No	Relationship	Date Of Birth	Action
			Identity Card		Policyholder		

[Add Traveler](#) [Download bulk upload template](#) [Upload bulk upload template](#) [Clear all input](#)

Insured Persons

Title	Surname	Given Name	Doc. Type	HKID/Passport No	Relationship	Date Of Birth	Action
Ms	Wang	January	Identity Card	N7777777	N.A	01/01/1990	
Mrs	Li	February	Identity Card	A1234563	Travel Companion	01/01/1990	
Mr	Zhang	March	Passport	Ad11111	Travel Companion	01/01/2000	
Ms	Liu	April	Passport	Ad11112	Travel Companion	02/01/2000	
Mrs	Chen	May	Passport	Ad11113	Travel Companion	03/01/2000	
Mr	Yang	June	Passport	Ad11114	Travel Companion	04/01/2000	
Mr	Wu	September	Passport	Ad11117	Travel Companion	07/01/2000	
Ms	Zhou	October	Passport	Ad11118	Travel Companion	08/01/2000	
Ms	Zhou	November	Passport	Ad11119	Travel Companion	09/01/2000	
Mr	Wu	December	Passport	Ad11120	Travel Companion	10/01/2000	
Ms	Zhou	January	Passport	Ad11121	Travel Companion	11/01/2000	
Ms	Zhou	February	Passport	Ad11122	Travel Companion	12/01/2000	
Mr	Cheung	March	Passport	Ad11123	Travel Companion	13/01/2000	
Ms	Cheung	April	Passport	Ad11124	Travel Companion	14/01/2000	
Ms	Cheung	May	Passport	Ad11125	Travel Companion	15/01/2000	
Mr	Cheung	June	Passport	Ad11126	Travel Companion	16/01/2000	
Ms	Cheung	July	Passport	Ad11127	Travel Companion	17/01/2000	
Ms	Cheung	August	Passport	Ad11128	Travel Companion	18/01/2000	
Mr	Cheung	September	Passport	Ad11129	Travel Companion	19/01/2000	
Ms	Cheung	October	Passport	Ad11130	Travel Companion	20/01/2000	

[Add Traveler](#) [Download bulk upload template](#) [Upload bulk upload template](#) [Clear all input](#)

Bulk Purchase Function 團體購買

Steps 步驟:

7. Insured Person(s) Display 受保人資料:

If the no. of insured individuals exceeds 20 pax, the "Insured Person(s)" section will display the message: "Please refer to Appendix 1."
若受保人數超過20人,「受保人」部分將顯示「請參閱附錄1」資訊。

Image 圖像:

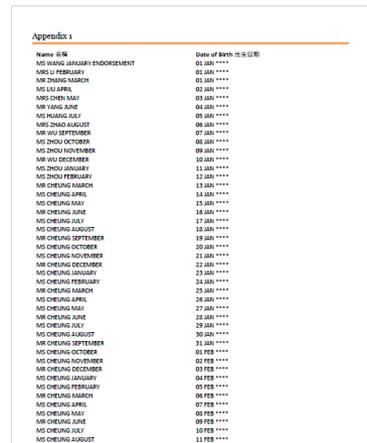
Policy Details 保單內容

No.	Description	Detail
1.	Policy Number: 保單號碼	CT55DAAG897
2.	Applicant: 保單持有人	TEST SCHOOL
3.	Travel Period: 旅遊期間	From 18 Sep 2025 To 18 Sep 2025
4.	Policy Endorsement Date: 保單訂立日期	18 SEP 2025
5.	Insured Person(s): 受保人	Please refer Appendix 1

Appendix 1

Name 姓名	Date of Birth 出生日期
MS WANG JANUARY ENDORSEMENT	01 JAN ****
MS LI FEBRUARY	01 JAN ****
MR CHENG MARCH	01 JAN ****
MS LI APRIL	01 JAN ****
MR CHENG MAY	01 JAN ****
MR WANG JUNE	01 JAN ****
MR CHENG JULY	01 JAN ****
MR WANG AUGUST	01 JAN ****
MR WU SEPTEMBER	01 JAN ****
MR CHOU OCTOBER	01 JAN ****
MS CHAU NOVEMBER	01 JAN ****
MR CHOU DECEMBER	01 JAN ****
MS CHAU JANUARY	01 JAN ****
MR CHOU FEBRUARY	01 JAN ****
MR CHENG MARCH	01 JAN ****
MS CHENG APRIL	01 JAN ****
MR CHENG MAY	01 JAN ****
MR CHENG JUNE	01 JAN ****
MR CHENG JULY	01 JAN ****
MR CHENG AUGUST	01 JAN ****
MR CHENG SEPTEMBER	01 JAN ****
MR CHENG OCTOBER	01 JAN ****

Please see below the Sample fulfilment for reference. 請參閱以下保單確認電郵內容以供參考。



Download Report 下載報告

Download Report 下載報告

The screenshot shows the AGENTPORTAL interface. The breadcrumb trail is 'Home > Reports > Policy Transactions'. The main content area has a section titled 'Criteria' with a 'Products' dropdown menu showing '3 Selected' and a 'Period Type' dropdown menu. A sidebar on the left contains navigation icons and a menu with the following items: 'Report Download', 'Policy Transactions', and 'HK-Policy with Insured Details'. A dark blue callout box points to the 'Policy Transactions' menu item.

To obtain a policy report for a specific period based on transaction date, please follow these steps:

若要根據交易日期取得特定期間的保單報告，請依照下列步驟操作：

1. Main page select “Reports”, then choose “Policy Transactions”

1. 於主頁選擇”報告”，然後選擇 “保單報表”。

Download Report 下載報告

The screenshot shows the AGENTPORTAL interface for 'Policy Transactions'. A red circle highlights the 'Edit Report Columns (6)' button. The 'Policy Transactions Columns' panel is open, displaying a search bar and a list of columns with checkboxes. The following columns are selected:

- Agent Name
- Base Premium
- Booking Reference
- Customer Payment Type
- GST / SST
- Max. Trip Duration

The following columns are not selected:

- All
- 1st Insured DOB
- Account Name
- Additional Upgrade
- By Email
- By Reg. Mail
- Category
- Cover Type Code
- Credit Card Type
- Destination
- Discount Code
- Document Number
- Excess Level
- Installments
- Is SMS Send
- Levy
- Membership Number
- Nationality
- No of Persons
- Not Receive Marketing - Email
- 1st Insured Name(SurGiv)
- Account Number
- AG Office ID
- Agent Producer Code
- By Mail
- Campaign Code
- Commission
- Cover Type Name
- Discount Amount
- Distribution Channels
- Endorsement or Cancellation Effective Date
- Insured Name
- Issuance Date
- Master Policy Number
- Membership
- MID
- Net Premium
- Not Receive Marketing - Mail

2. Provide the necessary information and select the report items by modifying the “Edit Report Columns”.

2. 提供必要的資訊，並透過編輯「報告欄」選擇保單報表選項。

Download Report 下載報告

AGENTPORTAL

Home > Reports > Policy Transactions

Edit Report Columns (6)

Criteria

Products
1 Selected

Period Type
Issue Date

Period From
23/02/2025

Period To
25/03/2025

Submit Request

Success
Your request is submitted successfully. You will get notified when report is ready for download

3. After that, click on "Submit Request," and you will see a "Success" message once the report is ready.

3. 之後，按一下“提交請求”，報告準備就緒後，您將看到“成功”資料。

Download Report 下載報告

AGENTPORTAL

Home > Reports > Report Download

Refresh

No.	Date	Report	Status	Download / Remark
1	2024-11-22 11:31:43	Policy Transaction	Success	Report is ready

« 1 »

Report Download

Policy Transactions

HK-Policy with Insured Details

4. Choose "Report Download," and you will find the "Policy Transaction Report".

4. 選擇“下載報告”，您將找到“保單交易報告”。

Download Report 下載報告

Policy Number	Issuance Date	Policy Start Date	Policy End Date	Travel Start Date	Travel End Date	Travel Duration	Settlement Date	Revision	Renewal Revision
CTSPDAA3406	2024-11-12 09:34:40	2025-01-15	2025-01-15	2025-01-15	2025-01-15	1	2024-11-12 09:34:40	0	0
CTA3DAA0343	2024-11-12 10:02:43	2024-11-29	2025-11-28	2024-11-29	2025-11-28	365	2024-11-12 10:02:43	0	0

Policy Number	Base Premium	Levy	Total Tax	Commission	Discount Amount	Discount Code	Net Premium	Policy Total Premium	Voucher Code	Voucher Amount
CTSPDAA3406	117.88	0.12	0.12	41.3	0		76.7	118		0
CTA3DAA0343	1628.37	1.63	1.63	489	0		1141	1630		0

The amount of commission in HK\$
所得佣金。

After opened the file, you may save it to your computer and file as your own sales record.
開啓Excel 檔案後，可自行儲存到電腦資料庫中，方便用作核對月結單。

Producer	Producer Description	Agent	Promotion Code
7L00XXX	ACELife HK 7L00XXX	CHAN TAI MAN	10

Shows the discount that had given, 10 = 10% off.
折扣百分比 10 = 10% = 九折。

Download Report 下載報告

The report is available in Excel format and may include the following information:

該報告以 Excel 格式提供，可能包含以下資訊：

- Policy No. 保單號碼
- Policy issuance date 發單日期
- Discount % 折扣碼
- Policy Type 保單類別
- Policy Status 保單狀況
- Travel start date & Travel end date 出發及回程日
- Policyholder's name, mailing address, tel. no and email address 保單持有人資料、地址、聯絡電話及電郵
- Insured(s) information 受保人資料

You can also view the details of premiums and commissions earned, which include the following items:

另外，亦可透過此報告查看付款資料，保費和佣金的詳細項目，包括；

- Total Premium 總保費
- Net Premium 淨保費
- Commission 佣金
- Credit Card's Type 信用卡類別

Once you open the file, you can save it to your computer and store it as your own sales record.

開啓Excel 檔案後，可自行儲存到電腦資料庫中，方便用作核對月結單。

Legacy CRS POLICY Checking Method 查詢CRS保單系統之有關保單方法

Legacy CRS POLICY Checking Method

查詢舊保單系統(CRS)保單的方法

The screenshot shows the AGENTPORTAL search interface. The search bar is highlighted with a red box, and the search button (a magnifying glass icon) is also highlighted with a red box. A dropdown menu is open, showing the search options: Policy No., Policy Keyword Search, and Quote Keyword Search. The 'Policy No.' option is selected. Below the search bar, the results are displayed as 'Agent Portal (110 Results)' and 'Legacy CRS (667 Results)'. Three policy results are shown, each with a policy number, date, status, product, plan, travel period, and policyholder. The first result is for policy number HASHKAA0007666, dated 26/03/2025, sold, with product HK Travelsure Protection Plan, plan Single Trip - Standard Plan, travel period 26/03/2025 - 30/03/2025, and policyholder LetYKpM ZHKnsFD. The second result is for policy number HASHKAA0007664, dated 25/03/2025, sold, with product HK Travelsure Protection Plan, plan Single Trip - Standard Plan, travel period 25/03/2025 - 29/03/2025, and policyholder MzFIPyM ZMKuMPz. The third result is for policy number HASHKAA0007656, dated 25/03/2025, sold, with product HK Travelsure Protection Plan, plan Single Trip - Standard Plan, travel period 25/03/2025 - 29/03/2025, and policyholder lhfgRIZ TudlKki.

You can locate the Legacy CRS policies by selecting "Legacy CRS" on the search page. From there, you can search using Policy No., Policy Keyword Search, or Quote Keyword Search. Simply input the required information and click "search (🔍)" to access the quote or policy.

您可以透過在搜尋頁面上選擇“Legacy CRS”來尋找舊版CRS系統的保單。從那裡，您可以使用保單號碼、保單關鍵字或報價關鍵字進行搜尋。只需輸入所需資訊並點擊「搜尋 (🔍)」即可存取報價或保單。

Legacy CRS POLICY Checking Method

查詢舊保單系統(CRS)保單的方法

AGENTPORTAL

Home > Search

SEARCH Policy No. Search by Policy Certificate Number

Legacy CRS (962 Results)

CTA3CAA077R1 Product : HK Chubb TravelWell Annual Protection Plan
 Status : Sold
 Travel Period : 01/04/2025 - 31/03/2026
 Policyholder : Amy Amy Test
 Br:Hk2b
 CHUBB Hong Kong
 CDTWTA2002

CTA1CAA5329R1 Product : HK Chubb TravelWell Annual Protection Plan
 Status : Sold
 Travel Period : 22/03/2025 - 21/03/2026
 Policyholder : Mr Test M
 Hktps1.Br
 CHUBB Hong Kong
 CDTWTA2002

CTA1CAA5329E1 Product : HK Chubb TravelWell Annual Protection Plan
 Status : Policy / Renewed
 Travel Period : 01/03/2024 - 28/02/2025
 Policyholder : Mr Test M
 Hktps1.Br
 CHUBB Hong Kong
 CDTWTA2002

Click on the related policy, and you will be redirected to the policy within the CRS system.

點選相關保單，您將被重新導向到CRS系統內的保單。

CHUBB

Home Policies Documents Reports Profile Help Logout

Current Product : HK Chubb TravelWell Annual Protection Plan

Policy Confirmation

Thank you for purchasing, your transaction is now complete:

Policy Certificate Number : CTA3CAA077R1	Organization Name : CHUBB Hong Kong
Status : Policy Accepted	Organization Account : 7001098
Enrollment Date : 24 Mar 2025	Master Policy Number : CDTWTA2002
Issue Date : 24 Mar 2025	User Name : br.hk2b
	Last Updated By : winnietest1.uw

Insured Person Details

Title	Surname	Given Name	Date Of Birth	HKID/Passport No	Relationship
Test	Test	Amy Amy	15 Jul 2002	N7777777	Policyholder

Summary of Covers

Start Date	01 Apr 2025
End Date	31 Mar 2026
Total Day(s)	365
Product	HK Chubb TravelWell Annual Protection Plan
Plan	Chubb TravelWell Annual Protection Plan (Plan 3 (Annual))
Destination	Worldwide
Insured Type	Individual
Promotion Code	
Voucher Code	
Marketing Code	
Source System	

Premium Details

Total Premium	HKS 1,830.00
Discounted Amount	HKS 0.00
Voucher Amount	HKS 0.00
Collected Premium	HKS 1,830.00

Policyholder Details

Name of Applicant	Test Amy Amy
HKID/Passport No	N7777777
Address	Hghghddsf
Post Code	
Telephone	
Mobile Phone	
Email Address	amy.kwok@chubb.com
Membership ID	

Renew Policy 續保年單

Renew Policy 續保年單 (for Agent Portal policy)

Home > Search

SEARCH Policy No. CTA3DAA0906

Add Filter

Displaying Policy No. search results for CTA3DAA0906

Agent Portal (1 Results) Legacy CRS (0 Results)

CTA3DAA0906	Accepted	Agent
Plan : Plan 3 (Annual)	Policyholder : Dsfafds Dsf	Account
	Travel Period: 24/03/2025 - 23/03/2026	Quote

« 1 »

Export
(You can export up to the top 500 records.)

Showing 1 - 1 of 1 Records

To renew a policy in Agent Portal, start by selecting "Agent Portal" on the search page to find the relevant policies. Once you find the policy you need, click on it.

若要續保Agent Portal中的保單，請先在搜尋頁面上選擇相關保單。按一下它即可前往相關保單內容。

Renew Policy 續保年單 (for Agent Portal policy)

Home > Search >

CTA3DAA0906 | Accepted

General

Account	Chubb Hong Kong - TravelWell WL (Group)	Producer Code	7001098
Master Policy No.	CDTWTA0001	Modified Date	06/02/2026
Issued By	travelwell_wl.svc	Enrollment Date	06/02/2026
Updated By	Winnie Li		
Source System	InternalB2B		

Document Fulfillment Status
Processed by Email Service Provider (3:54 PM)

Policy

Policy Effective Date	Policy Expiry Date
-----------------------	--------------------

Search | CTA3DAA0906

Click on "Renew".
點擊「續保保單」。

Renew Policy 續保年單 (for Agent Portal policy)

Annual

Trip Duration
24/03/2026 - 23/03/2027 (365 days)

Region
Worldwide (except Cuba)

Cover Type
Couple

[Show all](#)

Applicant Contact Details

Address Line 1 *
Sdf Safs

Address Line 2

Address Line 3

Postal Code

Telephone
+852 · 5123 4567

Mobile *
+852 · 12341234

Email *
test_test@chubb.com

[Back](#) [Renew Policy](#)

Review all the information thoroughly before selecting “Renew Policy”.
徹底檢查所有資料，然後選擇「續保保單」。

Renew Policy 續保年單 (for Agent Portal policy)

Home

1. Personal Details 2. Declaration & Payment

HK Chubb TravelWell Annual Protection Plan

Your Travel Details

Trip Duration
24/03/2026 - 23/03/2027 (365 days)

Region
Worldwide

Cover Type
Couple

Promo Code
--

[Show all](#)

Plan 3 (Annual)

Base Premium HK\$ 2,932.07

Taxes

Payment Details

Payment Method *
Credit Term

Back Confirm

Review all the information thoroughly before selecting "Confirm".
徹底檢查所有資料，然後選擇「確認」。

Renew Policy 續保年單 (for Agent Portal policy)

The screenshot displays the Chubb Agent Portal interface. On the left is a navigation sidebar with icons for Home, Search, and various document management functions. The main content area shows policy details for CTA3DAA0906, with a status of "Renewal Accepted Renewal: 1". A callout box points to this status, stating: "Policy status changed to 'Renewal Accepted' 保單狀態已更改為「已接受續保」".

Below the policy details is a "Manage Documents" section with a dropdown menu. The "Manage Documents" option is highlighted with a callout box. The dropdown menu includes options: Manage Documents, Endorsement, Cancellation, Copy Policy, Disable Renewal, Resend Fulfilment, Resend WorkView, and Payment Details.

At the bottom, a table lists the available documents for download:

No.	Document Name	Version Timestamp	Generated By	Version
1	Certificate	10/2/2026 下午5:06:18	Winnie Li	0
2	Receipt	10/2/2026 下午5:06:18	Winnie Li	0
3	Travel Certificate	10/2/2026 下午5:06:18	Winnie Li	0
4	Policy Wording	10/2/2026 下午5:06:18	System	0
5	Benefit Schedule	10/2/2026 下午5:06:18	System	0
6	Brochure	10/2/2026 下午5:06:18	Winnie Li	0

A callout box points to the "Certificate" document in the table, with the text: "You may download the renewal policy documents under 'Manage Document', then click 'Certificate'. 您可以在「保單文件」下下載保單文件，然後點選「保單承保表」".

Renew Policy 續保年單

The screenshot displays the AGENTPORTAL search interface. At the top, there is a search bar with 'Policy No.' selected and 'CTA1CAA5069' entered. Below the search bar, there are filter options and a results summary showing 'Agent Portal (0 Results)' and 'Legacy CRS (1 Results)'. The 'Legacy CRS (1 Results)' tab is highlighted with a blue box. Below this, a table lists the search results. The first result is highlighted with a blue box and contains the following information:

CTA1CAA5069	Product : HK Chubb TravelWell Annual Protection Plan
08/04/2024	Plan : Plan 1 (Annual)
● Sold	Travel Period : 08/04/2024 - 07/04/2025
	Policyholder : Het4 Desai4

At the bottom of the results list, there is an 'Export' button and a note: '(You can export up to the top 500 records.)'. To the right of the results, there is a button labeled 'Renew Policy續保年單'.

To renew a policy in the Legacy CRS, start by selecting "Legacy CRS" on the search page to find the relevant policies. Once you find the policy you need, click on it to be directed to the policy section within the CRS system. Proceed to renew the policy in the CRS system.

若要續保舊版 CRS 中的保單，請先在搜尋頁面上選擇「舊版 CRS」以尋找相關保單。找到所需的保單後，按一下它即可前往 CRS 系統內的保單部分，繼續在 CRS 系統中更新保單。

Renew Policy 續保年單 (for Legacy CRS policy)

Policy Confirmation

Thank you for purchasing, your transaction is now complete:

Policy Certificate Number	: CTA1CAA5069	Organization Name	: CHUBB Hong Kong
Status	: Policy Accepted	Organization Account	: 7001098
Enrollment Date	: 08 Apr 2024	Master Policy Number	: CDTWTA2002
Issue Date	: 08 Apr 2024	User Name	: hktps1.br
		Last Updated By	: hktps1.br

Insured Person Details

Title	Surname	Given Name	Date Of Birth	HKID/Passport No	Relationship
	Desai4	Het4	14 Feb 2005	E757880A	Policyholder

Summary of Covers

Start Date	08 Apr 2024
End Date	07 Apr 2025

Payment Details

Pay To	Chubb
Payment Method	Credit Card
Transaction Date	2024-04-08 04:58
Payment Amount	HKD 3880.00
Receipt Number	11983812
Status	Successful
Card Type*	Mastercard

Generate Certificate Generate Policy Wording Generate Visa Letter

New Quote Copy Policy Cancel Policy Endorse Policy **Renew Policy** Disable Renewal Resend Email to Apollo

Resend Email to Policy Holder Back

Policy & Insured Details

Please enter the trip details below in order to receive a travel insurance quote. Fields with asterisks (*) denote required fields.

Start Date *	08 Apr 2025	Total Day(s)	365
End Date *	07 Apr 2026		
Product *	HK Chubb Travel/Well Annual Protection		
Plan *	Plan 1 (Annual)		
Destination *	Worldwide		
Insured Type *	Individual		
No. of Insured *	1		
No. of Insured(Aged 18-64)	1		
No. of Insured(Aged 65-75)	0		
Promotion Code			
Voucher Code			
Marketing Code			
Policy Type *	<input checked="" type="radio"/> Individual <input type="radio"/> Organisation		

Policyholder Details

Title *	N.A.	Surname *	Desai4	Given Name *	Het4
Address *	Address1			Telephone	00000000
				Mobile Phone	
				Email Address *	het.desai@chubb.com
Post Code	395023			Sent Policy via	<input type="checkbox"/> Email to Agent
HKID/Passport No *	E757880A	<input type="radio"/> ID <input type="radio"/> Passport		<input checked="" type="checkbox"/> Email to Policyholder	

Insured Persons Details

Same as Policyholder Details

Title *	Surname *	Given Name *	HKID/Passport No *	Relationship *	Date Of Birth *
N.A.	Desai4	Het4	E757880A	Policyholder	14 Feb 2005

Confirm Renewal Back

Click on "Renew Policy" and review all the information thoroughly before selecting "Confirm Renew."

點擊“Confirm Renew”並徹底檢查所有資料，然後選擇“Confirm Renew”。

Renew Policy 續保年單 (for Legacy CRS policy)

Policy Confirmation

Thank you for purchasing, your transaction is now complete:

Policy Certificate Number : CTA1CAA5069R1 Organization Name : CHUBB Hong Kong
Status : Policy Accepted Organization Account : 7001098
Enrollment Date : 27 Mar 2025 Master Policy Number : CDTWTA2002
Issue Date : 27 Mar 2025 User Name : hktps1.br
Last Updated By : Winniest.br

Insured Person Details

Title	Surname	Given Name	Date Of Birth	HKID/Passport No	Relationship
	Desai-4	He44	14 Feb 2005	E757880A	Policyholder

Summary of Covers

Start Date : 08 Apr 2025
End Date : 07 Apr 2026
Total Day(s) : 365
Product : HK Chubb TravelWell Annual Protection Plan
Plan : Chubb TravelWell Annual Protection Plan (Plan 1 (Annual))
Destination : Worldwide
Insured Type : Individual
Promotion Code :
Voucher Code :
Marketing Code :
Source System :

Premium Details

Total Premium	HK\$ 3,880.00
Discounted Amount	HK\$ 0.00
Voucher Amount	HK\$ 0.00
Collected Premium	HK\$ 3,880.00

AGENTPORTAL

Home > Search

SEARCH Policy No. CTA1CAA5069R1

Agent Portal (0 Results) Legacy CRS (1 Results)

CTA1CAA5069R1
27/03/2025
● Sold

Product : HK Chubb TravelWell Annual Protection Plan
Plan : Plan 1 (Annual)
Travel Period : 08/04/2025 - 07/04/2026
Policyholder : He44 Desai-4

HKtps1.Br CDTWTA2002
CHUBB Hong Kong

Showing 1 - 1 of 1 Records

Export
(You can export up to the top 500 records.)

Once the policy is renewed, the data will automatically synchronize with the Agent Portal.

保單更新後，資料將自動與Agent Portal 同步。

CHUBB®

THANK YOU