



AGENT PORTAL ONLINE PLATFORM USER GUIDE 網上投保系統使用說明 12/2025

Product 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

CONTENTS 目錄

• Access Agent Portal from OneHub 由OneHub進入Agent Portal.....	3
• Language Setting 語言設置	5
• Emergency Arrangement 緊急情況處理.....	6
• New Quote 索取報價 / Issue Policy 投保保單.....	7
• Search Policy (To retrieve issued policies) 保單查詢(可查詢曾發出過保單).....	14
• Download Product information files 下載索取產品資料.....	16
• Copy Policy 保單複製.....	19
• Endorse Policy 保單修改.....	21
• Cancel Policy 取消保單.....	24
• Bulk Purchase Function 團體購買.....	26
• Download Report 下載報告.....	31
• Legacy CRS Policy Checking Method 查詢CRS保單系統之有關保單方法.....	38
• Renew Policy 續保年單.....	41

Access Agent Portal from OneHub

由OneHub進入Agent Portal

This is the cover page of OneHub.

1. You will receive the log in 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.™

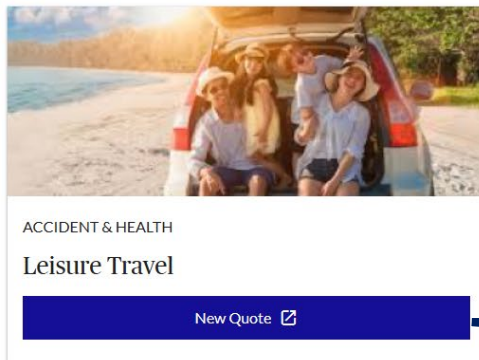
© 2025 Chubb [Privacy Policy](#) [Terms of Use](#)

Access Agent Portal from OneHub 由OneHub進入Agent Portal

Click on Products.
點擊產品。



Accident & Health (1)



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) ▼

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

Timezone

(UTC+08:00) Kuala Lumpur, Singapore ▼

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

Save

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。

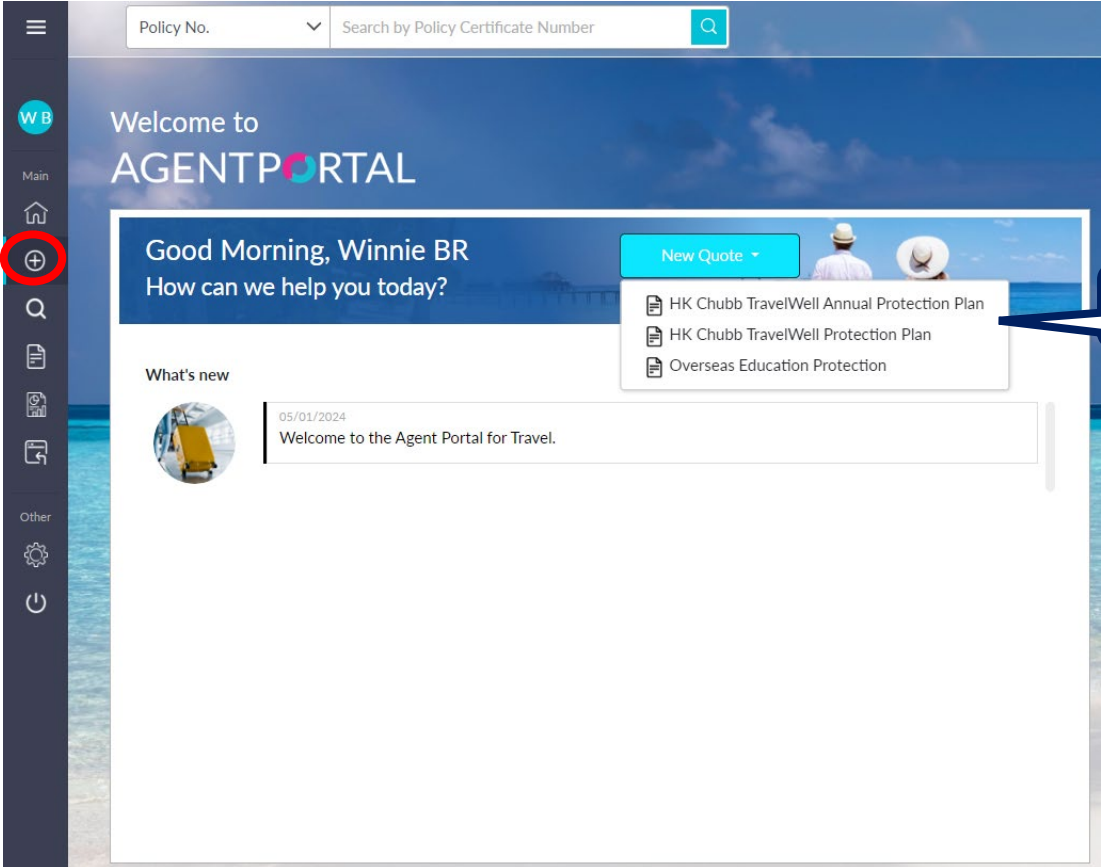
Emergency Arrangement

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 AGENTPORTAL interface. On the left, a vertical sidebar contains navigation icons, with the 'New Quote' icon (a plus sign inside a circle) highlighted by a red circle. The main content area features a search bar at the top, a welcome message 'Welcome to AGENTPORTAL', and a personalized greeting 'Good Morning, Winnie BR'. A 'New Quote' button is visible, which has opened a dropdown menu listing three products: 'HK Chubb TravelWell Annual Protection Plan', 'HK Chubb TravelWell Protection Plan', and 'Overseas Education Protection'. A callout box points to this dropdown menu with the text: 'Please click and select the Product. 按下並選擇所需產品。' Below the greeting, there is a 'What's new' section with a date '05/01/2024' and a 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
28/03/2023 - 01/04/2023 (5 days)

Region
Asia

Cover Type
Individual

Show all

Premier Plan

Base Premium HK\$ 263.74

Taxes 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

Campaign Code

Voucher 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

[Back](#) [Next Step](#)

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

Payment Details

Payment Method *

Credit Term

Back Confirm

Applicant Details

Title
Mr

Surname
Testing

Surname
Testing

Given Name
Test

HKID/Passport No
A1234563

Date Of Birth
25/12/2000

Contact Details

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

Account: CHUBB Hong Kong Broker - Testing Purpose
 Policy No: CTSPDAA0001
 Issued By: WYMAN BO
 Issued Date: 24/10/2023
 Updated By: WYMAN BO
 Updated Date: 24/10/2023
 Claim Code: nyman002

Policy

Policy Effective Date: 28/10/2023
 Policy Expiry Date: 01/04/2024
 Product: HK Chubb TravelWell Protection Plan
 Plan: Protector Plan
 Region: Asia
 Cover Type: Individual
 Policy Code: --
 Coverage Code: --
 Version ID: --

Trip Details

Start Date: 28/10/2023
 End Date: 01/04/2024
 Quantity of Insured: 1
 Paper: --

Applicant Details

Title: Mr.
 Name: Testing Test
 HKID Passport No: A123456789 (Card)
 Date of Birth: 28/12/1980

Insured Persons

Surname	Given Name	Relationship	HKID/Passport No	Date Of Birth
Testing	Test	Policyowner	A1234567	28/12/1980

Applicant Contact Details

Address: --
 --
 --
 Telephone: --
 Mobile: 5452144881166
 Email: chubbtest@chubb.com

Premium Details

Type/Premium	HKD	CAD/USD
Total Premium	HKD 0.00	CAD/USD 0.00
Discounted amount	HKD 0.00	CAD/USD 0.00
Net Premium	HKD 0.00	CAD/USD 0.00

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

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

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

You are now insured for your trip abroad.
 您已經成功投保。

Product: Chubb TravelWell Protection Plan
Policy Number: 65588888 CTSPDAA0001
Coverage: HKD 1,000,000 (Asia Pacific Region)
多保額: HKD 1,000,000 (Asia Pacific Region)

Dear Customer,

Thank you for choosing Chubb TravelWell Protection Plan. This insurance 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/verifying the Policy Wording and/or Policy Schedule.

Link: [Policy Wording](#)

Should you have any queries, please do not hesitate to contact our Chubb Insurance Hotline at 800 330 000 (during office hours 9:00 am to 5:00 pm on Bank Monday to Friday (Closed on Public Holiday, Sunday and Public Holiday)). You can also contact us via email at general@chubb.com.hk

We hope you have a pleasant journey!

Yours sincerely,

Chubb Insurance Hong Kong Limited

親愛的客戶：

多謝您選擇「香港旅遊保險」，為計劃為您提供最高達1,000萬港幣保障，令您安心盡享假期及旅遊樂趣。本保險計劃詳情如下：

請您透過以下連結下載「香港旅遊保險」的保單條款，並請細閱及保留該保單條款及所附保單附表及保單附表。您的保障是受保單條款及保單附表所規限。如閣下對下載或查閱保單條款或保單附表上有任何疑問，請聯絡我們的客戶服務熱線查詢。

查詢、產品詳情

如有任何查詢，歡迎致電統一靈通（線熱）：800 330 000（辦公時間：星期一至五上午九時至下午五時，公眾假期及銀行假期除外）。如閣下對下載或查閱保單條款或保單附表上有任何疑問，請聯絡我們的客戶服務熱線查詢。

讓我們留下您的足跡！

香港保險業管理委員會

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。

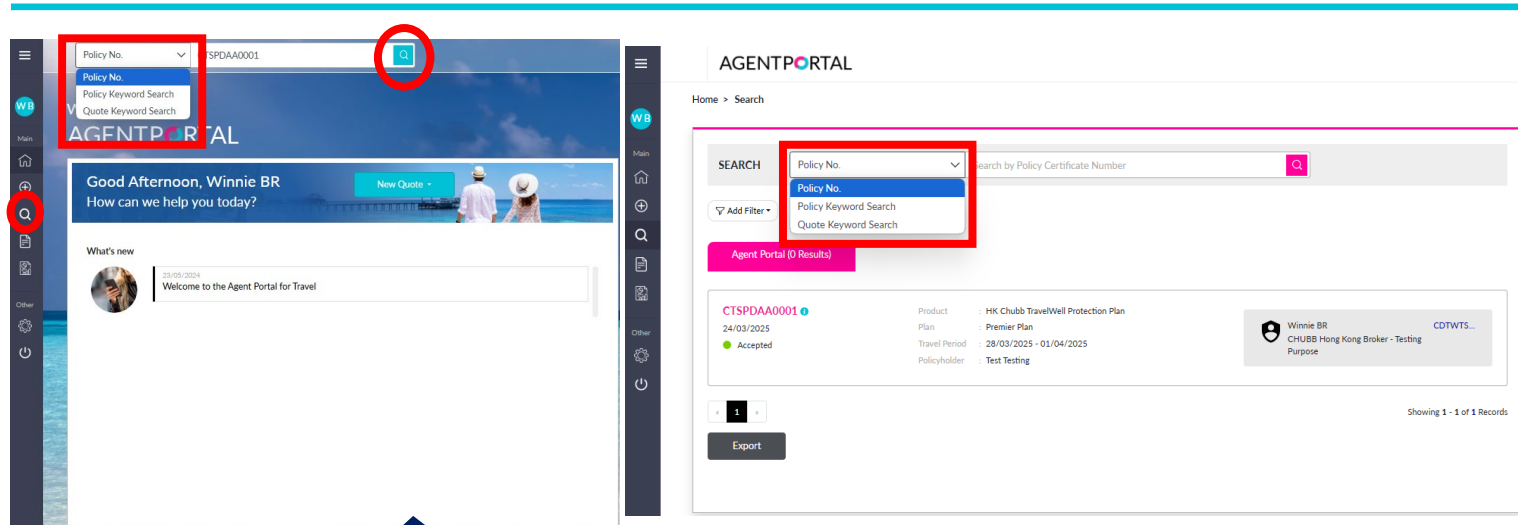
SEARCH POLICY

(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)



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 shows the AGENTPORTAL interface. The left sidebar contains a menu with icons for Home, Main, and Other. The Main section is active, showing a list of documents. A red circle highlights the document icon in the sidebar, and a callout box points to it with the text: "You can download the product information files here. 您可以在此下載產品資訊。"

AGENTPORTAL

Home > Documents

Add Filter Product HK Chubb TravelWell Annual Protection Plan

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

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. The left sidebar contains navigation icons. The main content area is titled 'Home > Documents'. A filter dropdown is open, showing 'Product: HK Chubb TravelWell Annual Protection Plan'. The 'Apply' button is highlighted. A callout box with a blue border and arrow points to the 'Apply' button, containing the text: 'Choose the product, then press “Apply”.' and '選擇產品，然後按“確認”'.

AGENTPORTAL

Home > Documents

▽ Add Filter • Product: HK Chubb TravelWell Annual Protection Plan

No. Document Name Document Number Document Type Date

1 PolicyWording 127197840 Policy Wording 12/12/2022

2 HKTPS Policy Wording YUU.org 127167652 Policy Wording 04/02/2024

3 HKTPS SOB 127424897 Benefit Schedule 07/03/2024

4 HKTPS SOB - YUU 127424923 Benefit Schedule 07/03/2024

5 HKTPS SOB - PCRAS 127424906 Benefit Schedule 07/03/2024

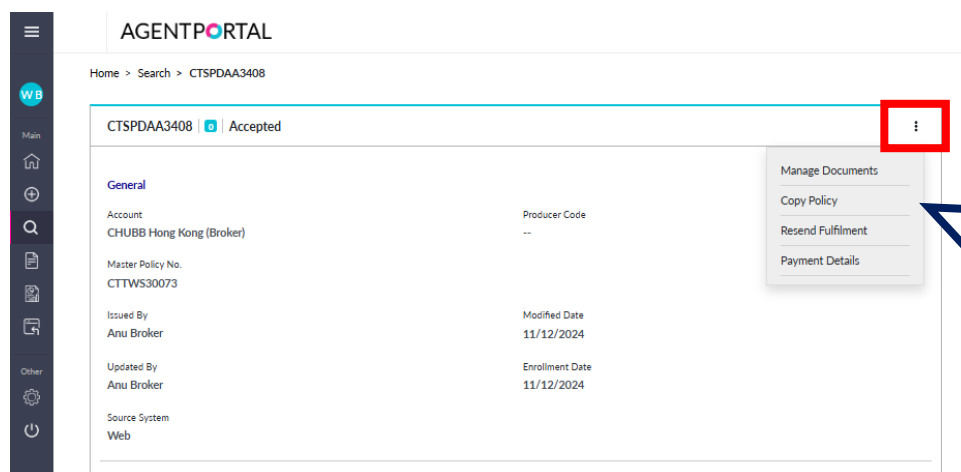
6 HKTPS SOB - PCRWV 127424906 Benefit Schedule 07/03/2024

7 HKTPS Brochure 127746297 Brochure 08/11/2024

1

Copy Policy 保單複製

Copy Policy 保單複製

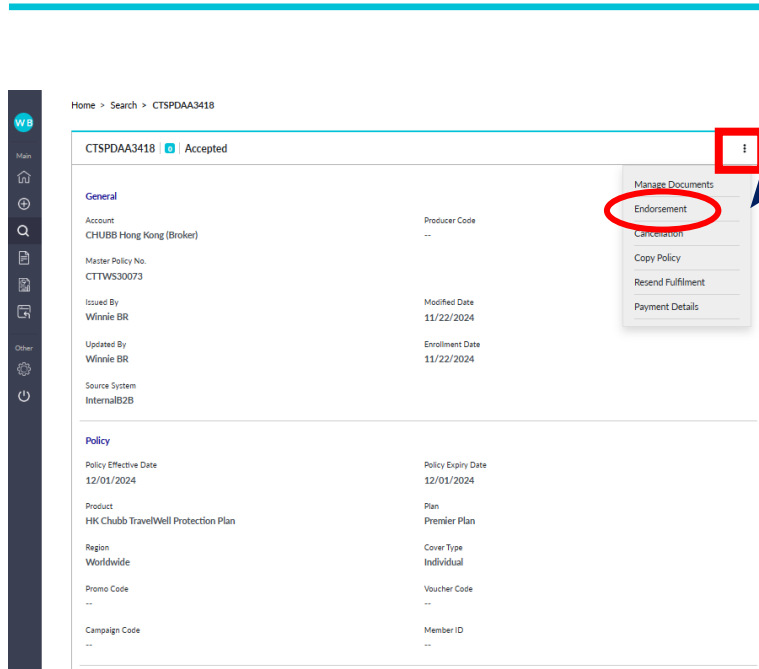


First search the Policy No. and enter to the product page, then press “Copy Policy” from the right corner menu (:).

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



Home > Search > CTSPDAA3418

CTSPDAA3418 | Accepted

General

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

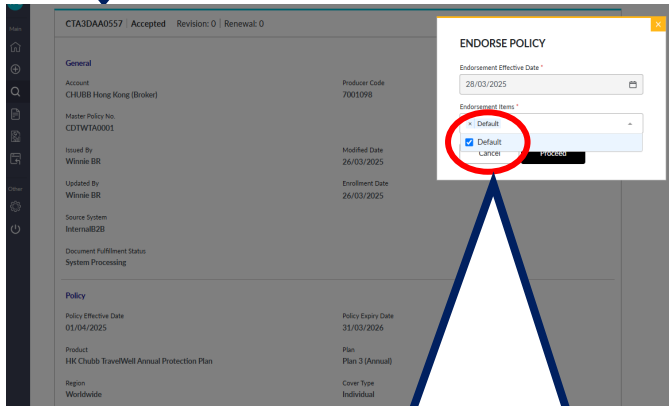
Policy

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。



CTA3DAA0557 | Accepted | Revision: 0 | Renewal: 0

General

Account	CHUBB Hong Kong (Broker)	Producer Code	7001098
Master Policy No.	CDTWTA0001		
Issued By	Winnie BR	Modified Date	26/03/2025
Updated By	Winnie BR	Enrollment Date	26/03/2025
Source System	InternalB2B		

Document Fulfillment Status: System Processing

Policy

Policy Effective Date	01/04/2025	Policy Expiry Date	31/03/2026
Product	HK Chubb TravelWell Annual Protection Plan	Plan	Plan 3 (Annual)
Region	Worldwide	Cover Type	Individual

ENDORSE POLICY

Endorsement Effective Date *

28/03/2025

Endorsement Items *

- ☒ Default
- ☐ Cancel
- ☐ Process

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 > CTSFDA0001 > Endorsement

1. Policy Details 2. Declaration & Payment

Endorsement

1. Your Travel Details

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

Region
Asia

Cover Type
Individual

Promo Code

2. Premium Plan

Original Premium
HK\$ 1,349.00

Revised Premium
HK\$ 1,349.00

Base Premium
HK\$ 1,347.05

Tax
HK\$ 1.05

Levy
HK\$ 1.05

Total Premium
HK\$ 1,349.00

Discounted Amount
HK\$ 0.00

Voucher Amount
HK\$ 0.00

3. Policy

Plan
Premier Plan

Country of destination
South Korea

Cover Type
Individual

Policy Code

Voucher Code

Change Code

Member ID

4. Insured Persons

Name	Surname	Given Name	Sex	Date of Birth	Residency	Policyholder	Date of Birth	Policy
Yip	Yip	Yip	Male	27/07/2025	HK	Yes	27/07/2025	---

5. Applicant Details

Title

Surname
CHUBB

Given Name
CHUBB

HKID/Passport No

Identity Card
A1234567

Date of Birth
20/02/1990

6. Applicant Contact Details

Address Line 1

Address Line 2

Address Line 3

Postal Code

Telephone
+852 - 0000 0000

Mobile
+852 - 0000 0000

Email
jackson.sing@chubb.com

Back Save 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 > CTSFDA0001 > Endorsement

ENDORSE POLICY

1. Personal Details 2. Declaration & Payment

HK Chubb TravelWell Protection Plan

1. Your Travel Details

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

Region
Asia

Cover Type
Individual

Promo Code

2. 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 > CTASDAA0555 > Cancellation

HK Chubb TravelWell Annual Protection Plan

Cancellation

Cancellation By *
Insured

Type of Refund *
Full Refund

Reason

Back Next

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。

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

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:
1. Input Number of Insured 輸入受保人人數: 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。	Who are you traveling with? Cover Type * Individual No. of Insured (Aged 0-64) ? 200 No. of Insured (Aged 65-79) ?
2. Premium Calculation 保費計算 : System automatically calculates the total premium. 系統自動計算總保費。	Smart Plan HK\$ 26,000.00 Cruise Worldwide HK\$ 59,000.00

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。

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

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。

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

Bulk Purchase Function 團體購買

Steps 步驟:

5. Upload Template 上載表格:

Use the "Upload Bulk Upload Template" button to upload the completed Excel file.

使用「上載團體投保表格」按鈕上傳已完成的 Excel 檔案。

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

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。

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:

[illegible]

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。

Chubb Trans Pacific Hong Kong Limited
Unit 2, 7/F, 22
Tsimsho, 22, Hong Kong
Queensway, Hong Kong
www.chubb.com

e-chubb@chubb.com

at SEP 2003

To Whom It May Concern
Re: Travel Insurance Certificate

Dear Sir/Madam,

Chubb Trans Pacific Protection Plan (Client Mail)
Policy No. T33333333333333333333

We acknowledge to have received your request for travelling for business or pleasure (with administrative reference to your company), as hereby declared that he/she is insured under the above Policy withstanding by Chubb Insurance Hong Kong Limited, details as provided in the policy summary below:

☐ (a) Name of Insured	☐ Please refer Appendix 1
☐ (b) Identification	☐ Please refer Appendix 1
☐ (c) Period of Insurance	☐ All day every day
☐ (d) Coverage and Limitation	☐ Refer to the policy schedule

The Policy includes a **Medical Expense Benefit** with sum insured HK\$500,000 and it covers COVID-19. All benefits are subject to the terms and conditions of the Policy. Please refer to the terms and conditions for details of the Policy.

Should you have any queries, please do not hesitate to call our Customer Service Hotline at (852) 910 9100 during office hours.

Yours sincerely,



Authorized Signatory

Signed on behalf of Chubb Insurance Hong Kong Limited
Signed at Hong Kong on SEP 2003



Chubb TravelWell Protection Plan

安達旅遊保險



Policy Schedule Endorsement

承保日期 (註註)

Date 日期: 18 SEP 2025

Policy Details 保單內容

No. Description	Detail
1. Policy Number: 保單號碼	CTSD00AMBB7
2. Applicant: 保險申請人	TEST SCHOOL
3. Travel Period: 旅遊期間	
	From To To 18 SEP 2025
4. Policy Endorsement Date: 保單生效日期	18 SEP 2025
5. Insured Person(s): 受保人	Please refer Appendix 1
6. Policy Schedule: 旅遊行程計劃	Smart Pass 行程計劃
7. Insured Type: 保險類別	Individual
8. Itinerary: 行程	Hong Kong – Ain – Hong Kong 香港 – 澳門 – 香港
9. Premium: 保費	Basic Premium 基本保費 HKD 18,507.00 Extra Premium 附加保費 HKD 0.00 Total Premium for this policy is HKD 18,507.00 此項行程之總保費為 HKD 18,507.00
10. Payment Breakdown: 付款摘要	Weather Amount 天氣保金 USD 0.00 Premium Amount 保費 USD 18,507.00
11. Benefits: 保障	Please refer to the Terms & Conditions for the insured insured of Plan schedule 請參閱本保險計劃之條款、保障及保費

Appendix 1		Date of birth (西曆/農曆)
NAME: CHAN	MS WING JUNG CHAN/ENDERSON	01 JUN ****
MR LI FEBRUARY		01 JUN ****
MR TSANG MARCO		02 JUN ****
MS LUU AILEY		03 JUN ****
MR CHOW JAMES		03 JUN ****
MR YING JUNE		04 JUN ****
MS HUANG JILL		05 JUN ****
MR SHAO AUGUST		06 JUN ****
MR HUO SEPTEMBER		07 JUN ****
MS ZHOU OCTOBER		08 JUN ****
MS ZHOU NOVEMBER		09 JUN ****
MR HUO DECEMBER		10 JUN ****
MS ZHOU JANUARY		11 JUN ****
MS ZHOU FEBRUARY		12 JUN ****
MR CHEUNG AUGUST		13 JUN ****
MS CHEUNG APRIL		14 JUN ****
MS CHEUNG MAY		15 JUN ****
MR CHEUNG JUNE		16 JUN ****
MS CHEUNG JULY		17 JUN ****
MS CHEUNG AUGUST		18 JUN ****
MR CHEUNG SEPTEMBER		19 JUN ****
MS CHEUNG OCTOBER		20 JUN ****
MS CHEUNG NOVEMBER		21 JUN ****
MR CHEUNG DECEMBER		22 JUN ****
MR CHEUNG JANUARY		23 JUN ****
MS CHEUNG FEBRUARY		24 JUN ****
MR CHEUNG MARCH		25 JUN ****
MS CHEUNG APRIL		26 JUN ****
MR CHEUNG MAY		27 JUN ****
MR CHEUNG JUNE		28 JUN ****
MS CHEUNG JULY		29 JUN ****
MS CHEUNG AUGUST		30 JUN ****
MR CHEUNG SEPTEMBER		31 JUN ****
MS CHEUNG OCTOBER		01 FEBR ****
MS CHEUNG NOVEMBER		02 FEBR ****
MS CHEUNG DECEMBER		03 FEBR ****
MS CHEUNG JANUARY		04 FEBR ****
MS CHEUNG FEBRUARY		05 FEBR ****
MR CHEUNG MARCH		06 FEBR ****
MS CHEUNG APRIL		07 FEBR ****
MS CHEUNG MAY		08 FEBR ****
MR CHEUNG JUNE		09 FEBR ****
MR CHEUNG JULY		10 FEBR ****
MS CHEUNG AUGUST		11 FEBR ****
MR CHEUNG SEPTEMBER		12 FEBR ****
MS CHEUNG OCTOBER		13 FEBR ****
MS CHEUNG NOVEMBER		14 FEBR ****

Download Report 下載報告

Download Report 下載報告

AGENTPORTAL

Home > Reports > Policy Transactions

Edit Report Columns (100)

Criteria

Products
3 Selected

Period Type

Report Download

Policy Transactions

HK-Policy with Insured Details

Submit Request

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. The breadcrumb trail is 'Home > Reports > Policy Transactions'. A button labeled 'Edit Report Columns (6)' is circled in red. Below it, the 'Criteria' section includes 'Products' (1 Selected), 'Period Type' (Issue Date), 'Period From' (23/02/2025), and 'Period To' (25/03/2025). A 'Submit Request' button is at the bottom. The 'Policy Transactions Columns' dialog box is open, showing a search bar and a list of columns. The following columns are checked:

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

The following columns are unchecked:

- ☐ 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”訊息。

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

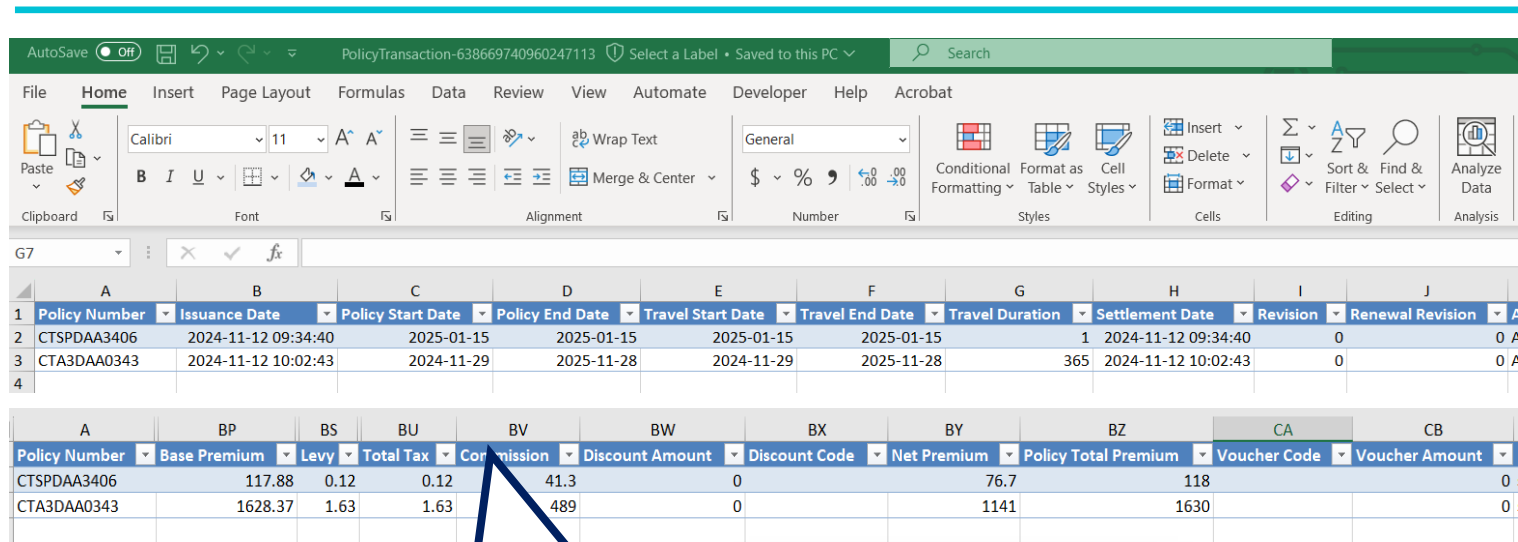
Policy Transactions

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



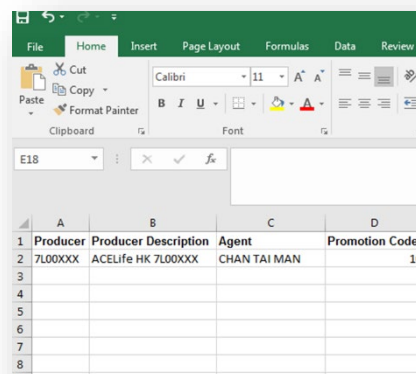
Policy Number	Issuance Date	Policy Start Date	Policy End Date	Travel Start Date	Travel End Date	Travel Duration	Settlement Date	Revision	Renewal Revision
CTSPDAA3406	2024-11-12 09:34:40	2025-01-15	2025-01-15	2025-01-15	2025-01-15	1	2024-11-12 09:34:40	0	0
CTA3DAA0343	2024-11-12 10:02:43	2024-11-29	2025-11-28	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. On the left is a vertical sidebar with icons for Home, Main, and a magnifying glass icon (highlighted with a red circle). The main area has a search bar with a dropdown menu. The dropdown menu is open, showing options: "Policy No.", "Policy Keyword Search", and "Quote Keyword Search". The "Policy No." option is selected. A red box highlights the search button (magnifying glass icon). Below the search bar, the results are displayed. The first result is highlighted with a pink box and labeled "Legacy CRS (667 Results)". The results list shows three items, each with a policy number, date, status, and details.

Policy No.	Date	Status	Product	Plan	Travel Period	Policyholder	Service	Quote No.
HASHKAA0007666	26/03/2025	Sold	HK Travelsure Protection Plan	Single Trip - Standard Plan	26/03/2025 - 30/03/2025	LetyKPM ZHKnsFD	Hase.Svc HASE Hong Kong	HASE000501
HASHKAA0007664	25/03/2025	Sold	HK Travelsure Protection Plan	Single Trip - Standard Plan	25/03/2025 - 29/03/2025	MzFIPyM ZMKuMPz	Hase.Svc HASE Hong Kong	HASE000501
HASHKAA0007656	25/03/2025	Sold	HK Travelsure Protection Plan	Single Trip - Standard Plan	25/03/2025 - 29/03/2025	lhfgRIZ TudlKki	Hase.Svc HASE Hong Kong	HASE000501

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)

CTA3CAA4077R1

Product : HK Chubb TravelWell Annual Protection Plan

Plan : Plan 1 (Annual)

Travel Period : 01/04/2025 - 31/03/2026

Policyholder : Amy Amy Test

Br/Hkb2b CHUBB Hong Kong CDTWTA2002

CTA1CAA5329R1

Product : HK Chubb TravelWell Annual Protection Plan

Plan : Plan 1 (Annual)

Travel Period : 22/03/2025 - 21/03/2026

Policyholder : Mr Test M

Hksp1.Br CHUBB Hong Kong CDTWTA2002

CTA1CAA5329E1

Product : HK Chubb TravelWell Annual Protection Plan

Plan : Plan 1 (Annual)

Travel Period : 01/03/2024 - 28/02/2025

Policyholder : Mr Test M

Hksp1.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 : CTA3CAA4077R1

Status : Policy Accepted

Enrollment Date : 24 Mar 2025

Issue Date : 24 Mar 2025

Organization Name : CHUBB Hong Kong

Organization Account : 7001098

Master Policy Number : CDTWTA2002

User Name : br.hkb2b

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	HK\$ 1,630.00
Discounted Amount	HK\$ 0.00
Voucher Amount	HK\$ 0.00
Collected Premium	HK\$ 1,630.00

Policyholder Details

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

Renew Policy 續保年單

Renew Policy 續保年單

The screenshot displays the AGENTPORTAL interface. At the top, there's a search bar with 'Policy No.' and the value 'CTA1CAA5069'. Below the search bar, there are two tabs: 'Agent Portal (0 Results)' and 'Legacy CRS (1 Results)'. The 'Legacy CRS (1 Results)' tab is selected, showing a single policy result for 'CTA1CAA5069'. The policy details include: Product: HK Chubb TravelWell Annual Protection Plan, Plan: Plan 1 (Annual), Travel Period: 08/04/2024 - 07/04/2025, and Policyholder: Het4 Desai4. A 'Renew Policy 續保年單' button is visible at the bottom right of the results area.

Policy No.	Product	Plan	Travel Period	Policyholder
CTA1CAA5069	HK Chubb TravelWell Annual Protection Plan	Plan 1 (Annual)	08/04/2024 - 07/04/2025	Het4 Desai4

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

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 *	☒ Individual ☐ Organisation		

Policyholder Details

Title *	N.A.	Surname *	Desai4	Given Name *	Het4
Address *	Address1			Telephone	000000000
				Mobile Phone	
				Email Address *	het.desai@chubb.com
Post Code	395023			Sent Policy via	☐ Email to Agent
HKID/Passport No *	E757880A				☒ Email to Policyholder
	☐ ID ☐ Passport				

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”並徹底檢查所有訊息，然後選擇“Confirm Renew”。

Renew Policy 續保年單

Policy Confirmation

Thank you for purchasing, your transaction is now complete:

Policy Certificate Number : CTA1CAA5069R1

Status : Policy Accepted

Enrollment Date : 27 Mar 2025

Issue Date : 27 Mar 2025

Organization Name : CHUBB Hong Kong

Organization Account : 7001098

Master Policy Number : CDTWTA2002

User Name : hhttps1.br

Last Updated By : Winnietest.br

Insured Person Details

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

Summary of Covers

Start Date

End Date

Total Day(s)

Product

Plan

Destination

Insured Type

Promotion Code

Voucher Code

Marketing Code

Source System

08 Apr 2025

07 Apr 2026

365

HK Chubb TravelWell Annual Protection Plan

Chubb TravelWell Annual Protection Plan (Plan 1 (Annual))

Worldwide

Individual

Premium Details

Total Premium

Discounted Amount

Voucher Amount

Collected Premium

HK\$ 3,880.00

HK\$ 0.00

HK\$ 0.00

HK\$ 3,880.00

AGENTPORTAL

Home > Search

SEARCH

Policy No.

CTA1CAA5069R1

Add Filter

Agent Portal (0 Results)

Legacy CRS (1 Results)

CTA1CAA5069R1

27/03/2025

Sold

Product

Plan

Travel Period

Policyholder

HK Chubb TravelWell Annual Protection Plan

Plan 1 (Annual)

08/04/2025 - 07/04/2026

He:4 Desai:4

Hhttps1.Br

CHUBB Hong Kong

CDTWTA2002

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