



# 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

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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 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.™

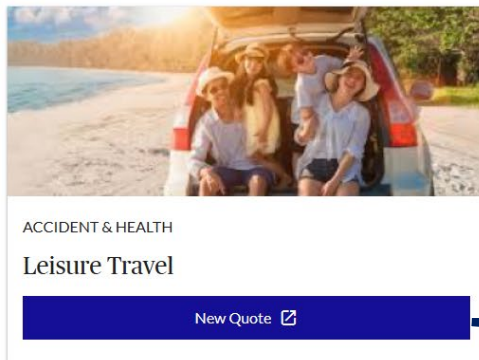
© 2025 Chubb [Privacy Policy](#) [Terms of Use](#)

# 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

---

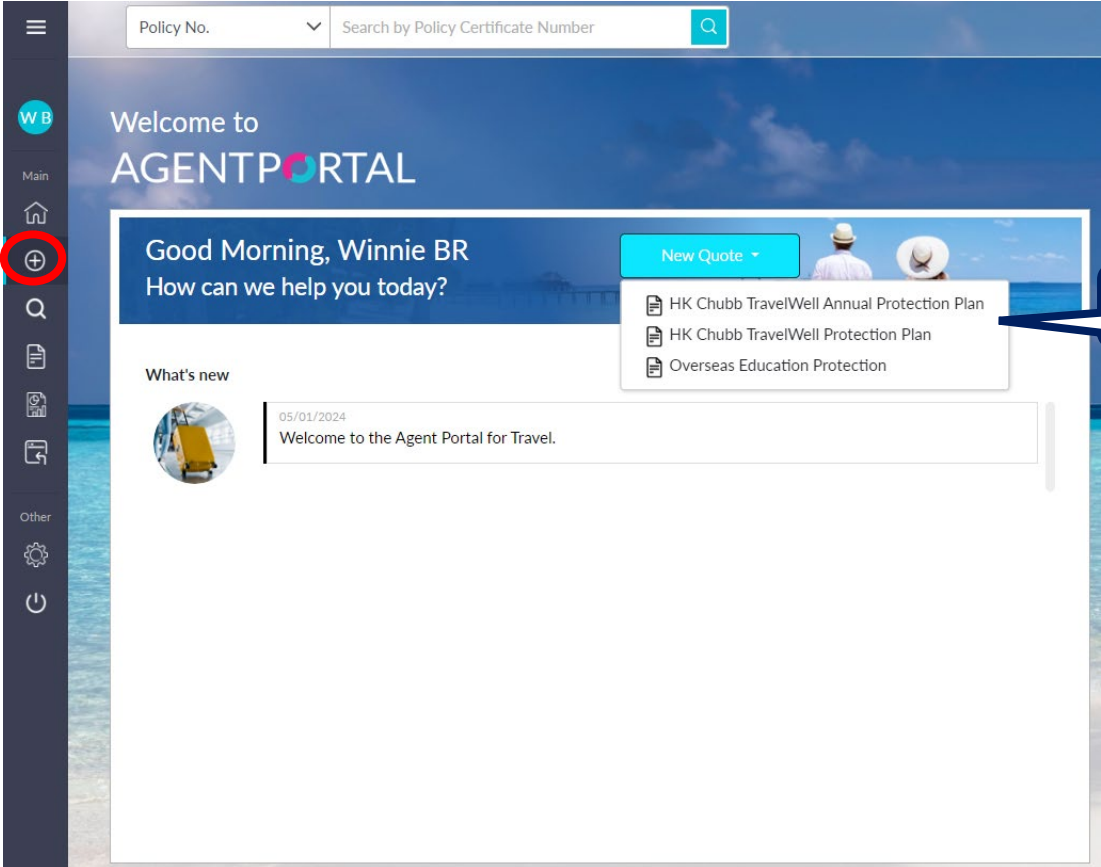
- In the event of an emergency or if you're unable to access the system to issue a policy, please email the IDP Team/Travel Team with the information detailed below for HOLD COVER. Once conditions return to normal, please issue the policy and inform us so we can process the endorsement.
- 假若閣下在任何情況下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 is a dark sidebar with a menu. The 'Main' section includes a home icon, a plus icon (circled in red), a search icon, and document icons. The 'Other' section includes a settings icon and a power icon. The main content area has a search bar at the top with 'Policy No.' and 'Search by Policy Certificate Number'. Below this is a welcome message: 'Welcome to AGENTPORTAL' and 'Good Morning, Winnie BR. How can we help you today?'. 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 bubble points to this menu with the text: 'Please click and select the Product. 按下並選擇所需產品。' Below the welcome message is a 'What's new' section with a date '05/01/2024' and the text '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: [Input Field] **Apply**

**Next Step**

**Callouts:**

- 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](#)

**Applicant Contact Details**

Voucher Amount HK\$ 0.00

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  
06/06/2025 - 10/06/2025 (5 days)

Region  
Asia

Cover Type  
Individual

Show all

**Smart Plan**

|                   |             |
|-------------------|-------------|
| Base Premium      | HK\$ 188.81 |
| Taxes             |             |
| Levy              | HK\$ 0.19   |
| Total Premium     | HK\$ 189.00 |
| Discounted Amount | HK\$ 0.00   |
| Voucher Amount    | HK\$ 0.00   |

**Applicant Details**

Title  
Mr

Surname  
Test

Given Name  
Test

HKID/Passport No

**Payment Details**

Payment Method \*  
Credit Card

Name on Card \*  
Card Number \*

Expiry Date \*  
MM/YY

CW \*

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 input credit details, then press "Confirm".

請核對投保資料，填寫信用卡資料，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 Code: ...  
Issue Policy No: CTSPDAA0001  
Issued By: Winston Bi  
Issued Date: 24/02/2023  
Updated By: Winston Bi  
Updated Date: 24/02/2023  
Quote Code: ...  
Accepted Code: ...

**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  
Form Code: ...  
Version Code: ...  
Currency Code: ...  
Invoice ID: ...

**Trip Details**

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

**Applicant Details**

Title: Mr.  
Name: Testing Test  
HKID/Passport No: A123456789 (Valid)  
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: ...  
Email: chubb.hk@chubb.com

**Premium Details**

| Type              | Amount | Unit    |
|-------------------|--------|---------|
| Total Premium     | HK\$   | CNH 200 |
| Tax               | HK\$   | 0.00    |
| Discounted amount | HK\$   | 0.00    |
| Net amount        | HK\$   | 0.00    |

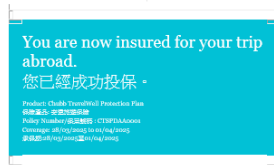
[EXTERNAL] Your Chubb TravelWell Protection Plan Confirmation No.CTSPDAA0001 from Ch

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 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 Week 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

敬啟者：

多謝您選擇「香港旅遊保險」，為計劃為您提供最高級24小時海外旅遊保障，令您可以盡情享受您的假期，不必擔心風險。

請您立即下載「政策字樣」，併同保險單，此保險單及政策字樣將下載到您的電腦或您的手提電話，請您保留此保險單及政策字樣為據，如閣下對下載或接收保險單或政策字樣有任何問題，請聯絡我們的客戶服務熱線。

另外，您還應：

1. 如閣下在假期，請向保險公司索取「保險卡」，以及公眾假期除外，上中環及下中環的公共交通工具除外，如閣下在假期，請向保險公司索取「保險卡」。

2. 閣下可致電保險公司查詢詳情。

請您留下您的聯絡：

香港保險管理委員會

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

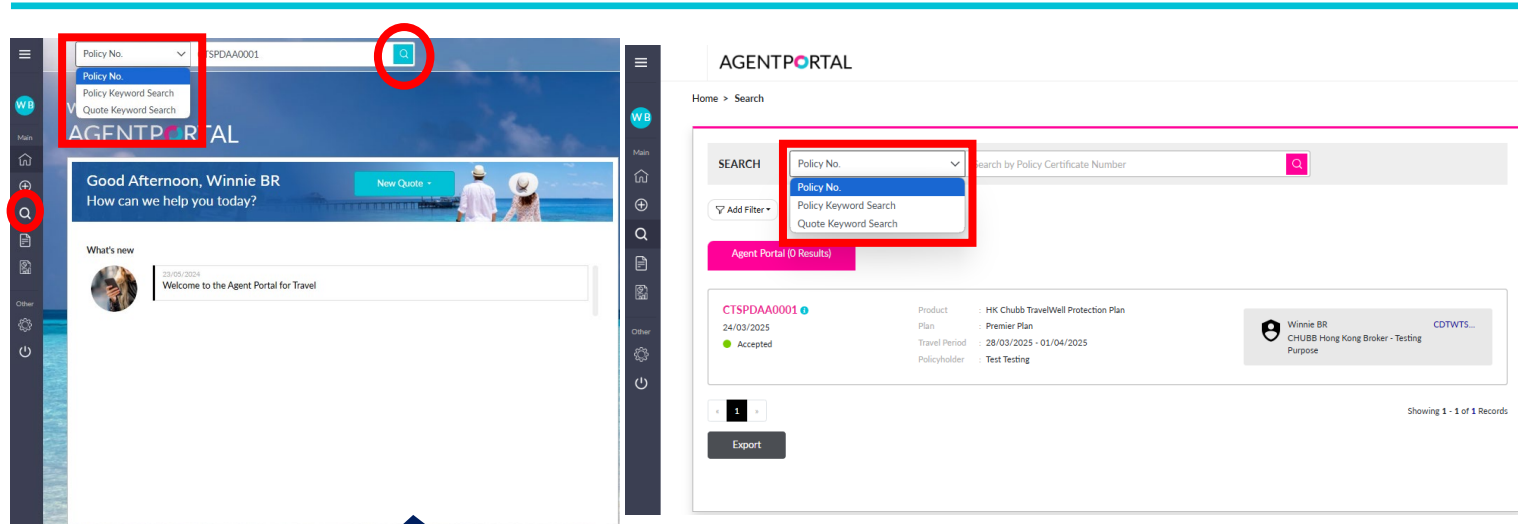
(To retrieve issued policies)

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。

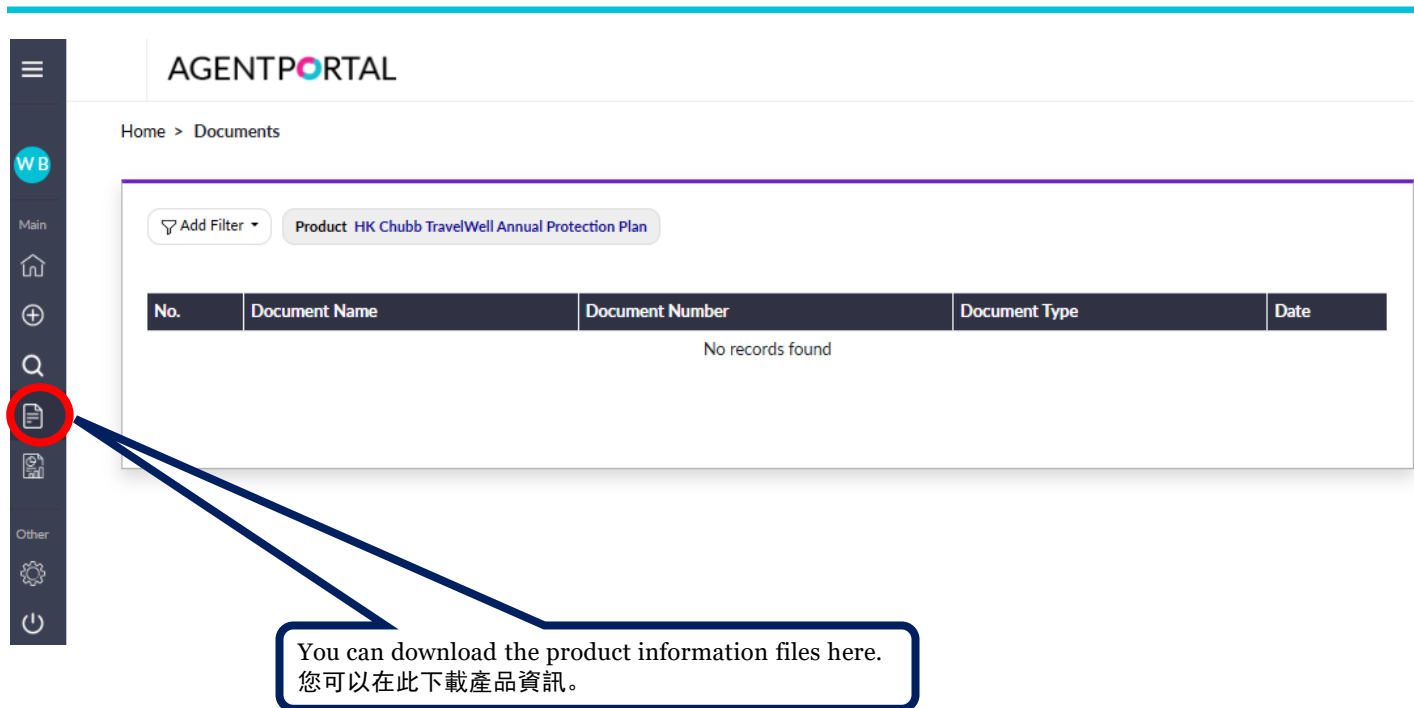
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# Download Product information files 下載索取產品資料

---

# Download Product information files

## 下載索取產品資料



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

AGENTPORTAL

Home > Documents

▽ Add Filter • Product HK Chubb TravelWell Annual Protection Plan

No. Document Name Document Number Document Type

Product: Equals

Value: HK Chubb TravelWell Annual Protection Plan

Cancel Apply

No records found

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

AGENTPORTAL

Home > Documents

▽ Add Filter • Product HK Chubb TravelWell 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 |

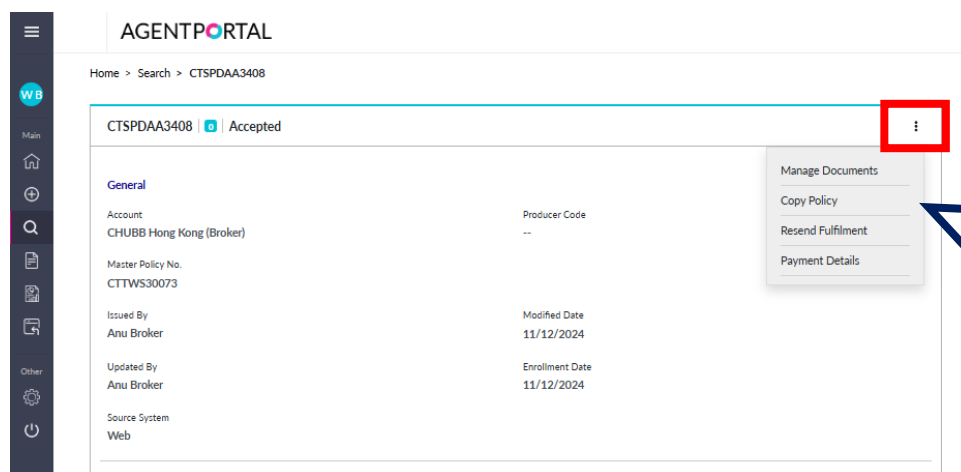
1

---

# 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 ( : ).

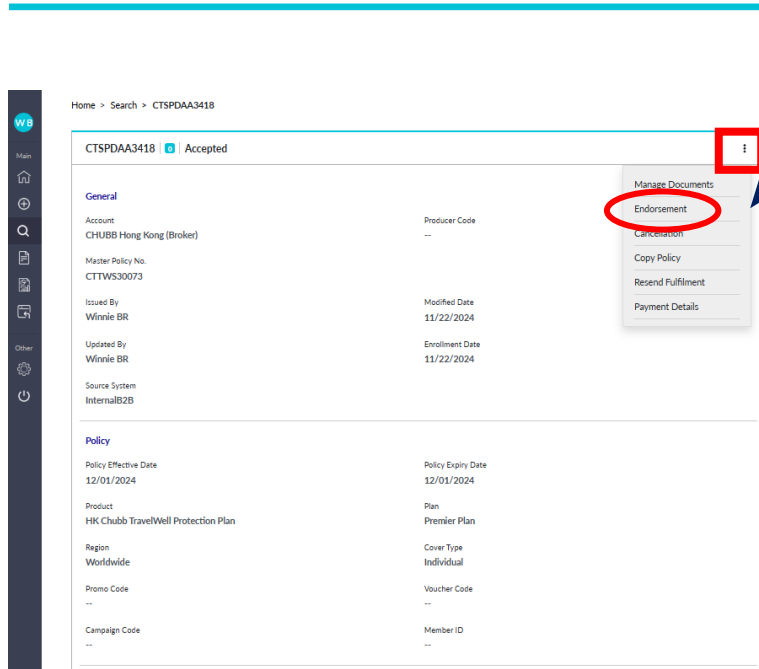
首先搜尋保單，然後按右上角選單 ( : ) 中的「複製保單」。

---

# 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              |                 |            |

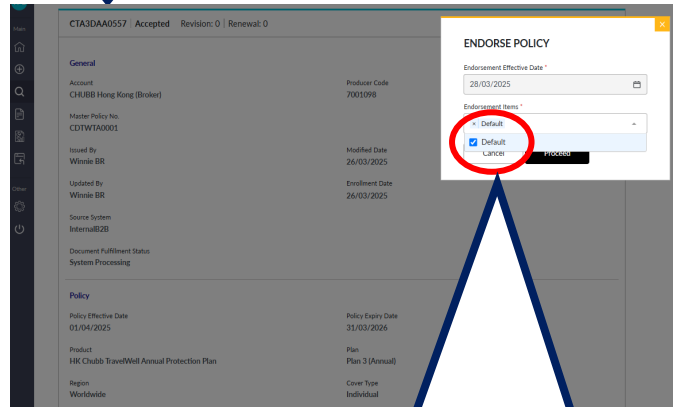
**Policy**

|                       |                                     |                    |              |
|-----------------------|-------------------------------------|--------------------|--------------|
| 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\$ 1.00

Levy HK\$ 1.00

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

Promote Code

Voucher Code

Change Code

Member ID

4. Insured Persons

| Name | Surname | Given Name | Sex  | Date of Birth | Residency | Date of Birth | Status |
|------|---------|------------|------|---------------|-----------|---------------|--------|
| Yin  | Chiu    | Chiu       | Male | 27/07/2025    | HK        | 27/07/2025    | AT     |

5. Applicant Details

Title  
Mrs

Surname  
CHIU

Given Name  
CHIU

HKID/Passport No  
---

Identity Card  
A1234567

Date of Birth  
20/02/1990

6. Applicant Contact Details

Address Line 1  
8888

Address Line 2  
9999

Address Line 3  
1000

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

Show all

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

|                                                |                                  |
|------------------------------------------------|----------------------------------|
| <b>General</b>                                 |                                  |
| Account<br>CHUBB Hong Kong (Broker)            | Producer Code<br>---             |
| Master Policy No.<br>CTW530073                 |                                  |
| Issued By<br>Winie BR                          | Modified Date<br>11/22/2024      |
| Updated By<br>Winie BR                         | Enrollment Date<br>11/22/2024    |
| Source System<br>InternalB2B                   |                                  |
| <b>Policy</b>                                  |                                  |
| Policy Effective Date<br>12/01/2024            | Policy Expiry Date<br>12/01/2024 |
| Product<br>HK Chubb TravelWell Protection Plan | Plan<br>Premier Plan             |
| Region<br>Worldwide                            | Cover Type<br>Individual         |
| Promo Code<br>---                              | Voucher Code<br>---              |
| Campaign Code<br>---                           | Member ID<br>---                 |

- 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:                                                                                                                                              |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>1. Input Number of Insured 輸入受保人人數:</b><br><br>On the “Travel Detail” page, user inputs the no. of insured when creating a new policy.<br>在「旅遊計劃詳情」頁面，建立新保單時輸入受保人人數。 | <p>Who are you traveling with?</p> <p>Cover Type *</p> <p>Individual</p> <p>No. of Insured (Aged 0-64) ? 200</p> <p>No. of Insured (Aged 65-79) ?</p> |
| <b>2. Premium Calculation 保費計算 :</b><br><br>System automatically calculates the total premium.<br>系統自動計算總保費。                                                            | <p>Smart Plan HK\$ 26,000.00 Select</p> <p>Cruise Worldwide HK\$ 59,000.00 Select</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。

## 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。

### 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:

[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**

中國人壽保險有限公司  
 The Overseas Chinese Insurance Co., Ltd.  
 (Incorporated in Hong Kong)  
 香港中環皇后大道中

Chubb Travel Insurance Hong Kong Limited  
 怡和洋行保險有限公司  
 www.chubb.com.hk

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at SEP 2005

To Whom It May Concern,  
**Re: Travel Insurance Certificate**

Dear Sir/Madam,

**(Chubb Travel) All Protection Plan (Smart Plan)**  
**(Policy No. CHSHKAA000R-K-Policy)**

With reference to below named person who is travelling for leisure or business (administrative duties) purposes, we hereby declare that he/she is insured under above Policy underwritten by Chubb Insurance Hong Kong Limited, details as provided in the policy summary below:

- (1) Name of Insured                 - Please refer Appendix 1
- (2) Destination                      - Japan
- (3) Period of Insurance          - all day - night - at Sep 2005
- (4) Coverage and limitation      - Refer to the policy condition

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

Should you have any queries, please do not hesitate to call our Customer Service hotline at (+854) your time during office hours

Yours sincerely,



Authorized Signatory

Signed for and on behalf of Chubb Insurance Hong Kong Limited

Signed at Hong Kong on at SEP 2005

# Chubb TravelWell Protection Plan

## 安達旅遊保險

### Policy Schedule Endorsement

承保表 (批註)

Date 日期: 18 SEP 2025

### Policy Details 保單內容

| No. | Description                        | Details                                                                                                                                           |
|-----|------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.  | Policy Number/<br>保單號碼             | CTSDA04887                                                                                                                                        |
| 2.  | Applicant/<br>保單持有人                | TSST SCHOOL                                                                                                                                       |
| 3.  | Travel Period/<br>旅遊期間             | From: 18 Sep 2025 To: 18 Sep 2025<br>由: 18 9月 2025 至: 18 9月 2025                                                                                  |
| 4.  | Policy Endorsement Date/<br>保單批註日期 | 18 SEP 2025                                                                                                                                       |
| 5.  | Insured Person(s)/<br>保單人          | Please refer Appendix 1                                                                                                                           |
| 6.  | Plan Selected/<br>已選擇計劃            | Smart Plan 明智計劃                                                                                                                                   |
| 7.  | Insurance Type/<br>已選擇計劃           | Individual                                                                                                                                        |
| 8.  | Itinerary/<br>旅程                   | Hong Kong – Asia – Hong Kong<br>香港 – 亞洲 – 香港                                                                                                      |
| 9.  | Premium/<br>(每日保費)<br>(已選擇保費)      | Basic Premium: 基本保費: HKD<br>18,400.00<br>Lower Premium: HKD 17.81<br>Total Premium for this policy is HKD<br>18,507.00<br>本保單之保費總額: HKD 18,507.00 |
| 10. | Payment Breakdown: 付款              | Voucher Amount 優惠金額: HKD 0.00<br>Paid Amount 已付保費: HKD 18,507.00                                                                                  |
| 11. | Benefit                            | Please refer to the Terms & Conditions for<br>the/this insured of Plan selected<br>請參閱已選擇計劃之條款/保單 (條款及細則)                                         |

Chubb TravelWell Protection Plan Policy Schedule Endorsement, Hong Kong Branch, Issued on 18/09/2025.

© 2025 Chubb. All coverage under this policy is not an insurable interest. All coverages available in all jurisdictions are subject to the terms, conditions, coverages, exclusions, and limitations of the applicable policy. Coverage is provided by Chubb Insurance Company of China, Ltd. (中國人壽保險有限公司) and its subsidiaries. Coverage is provided by Chubb Insurance Company of China, Ltd. (中國人壽保險有限公司) and its subsidiaries. Coverage is provided by Chubb Insurance Company of China, Ltd. (中國人壽保險有限公司) and its subsidiaries.

| Appendix 1                 |                    |
|----------------------------|--------------------|
| Name 姓名                    | Date of Birth 出生日期 |
| MSR JING JIANG ENDORSEMENT | 01 JAN ****        |
| MSR JI FENG                | 01 JAN ****        |
| MSR JIANG MACHU            | 01 JAN ****        |
| MSR JI LI JIANLI           | 02 JAN ****        |
| MSR CHEN MIAI              | 03 JAN ****        |
| MSR JIANG JIAN             | 06 JAN ****        |
| MSR HUANG JULY             | 05 JAN ****        |
| MSR ZHANG AUGUST           | 06 JAN ****        |
| MSR JIU SEPTEMBER          | 07 JAN ****        |
| MSR ZHOU SEPTEMBER         | 08 JAN ****        |
| MSR ZHOU NOVEMBER          | 09 JAN ****        |
| MSR JIU DECEMBER           | 10 JAN ****        |
| MSR ZHOU JANUARY           | 11 JAN ****        |
| MSR ZHOU FEBRUARY          | 12 JAN ****        |
| MSR CHENG MARCH            | 13 JAN ****        |
| MSR CHENG APRIL            | 14 JAN ****        |
| MSR CHENG MAY              | 15 JAN ****        |
| MSR CHENG JUNE             | 16 JAN ****        |
| MSR CHENG JULY             | 17 JAN ****        |
| MSR CHENG AUGUST           | 18 JAN ****        |
| MSR CHENG SEPTEMBER        | 19 JAN ****        |
| MSR CHENG OCTOBER          | 20 JAN ****        |
| MSR CHENG NOVEMBER         | 21 JAN ****        |
| MSR CHENG DECEMBER         | 22 JAN ****        |
| MSR CHENG JANUARY          | 23 JAN ****        |
| MSR CHENG FEBRUARY         | 24 JAN ****        |
| MSR CHENG MARCH            | 25 JAN ****        |
| MSR CHENG APRIL            | 26 JAN ****        |
| MSR CHENG MAY              | 27 JAN ****        |
| MSR CHENG JUNE             | 28 JAN ****        |
| MSR CHENG JULY             | 29 JAN ****        |
| MSR CHENG AUGUST           | 30 JAN ****        |
| MSR CHENG SEPTEMBER        | 31 JAN ****        |
| MSR CHENG OCTOBER          | 01 FEB ****        |
| MSR CHENG NOVEMBER         | 02 FEB ****        |
| MSR CHENG DECEMBER         | 03 FEB ****        |
| MSR CHENG JANUARY          | 04 FEB ****        |
| MSR CHENG FEBRUARY         | 05 FEB ****        |
| MSR CHENG MARCH            | 06 FEB ****        |
| MSR CHENG APRIL            | 07 FEB ****        |
| MSR CHENG MAY              | 08 FEB ****        |
| MSR CHENG JUNE             | 09 FEB ****        |
| MSR CHENG JULY             | 10 FEB ****        |
| MSR CHENG AUGUST           | 11 FEB ****        |
| MSR CHENG SEPTEMBER        | 12 FEB ****        |
| MSR CHENG OCTOBER          | 13 FEB ****        |
| MSR CHENG NOVEMBER         | 14 FEB ****        |
| MSR CHENG DECEMBER         | 15 FEB ****        |

---

# Download Report 下載報告

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# 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

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

Policy Transactions | CTSPDAA0001

**Policy Transactions Columns**

Search for column names

☐ All

|                                                        |                                                                     |
|--------------------------------------------------------|---------------------------------------------------------------------|
| <input type="checkbox"/> 1st Insured DOB               | <input type="checkbox"/> 1st Insured Name(SurGiv)                   |
| <input type="checkbox"/> Account Name                  | <input type="checkbox"/> Account Number                             |
| <input type="checkbox"/> Additional Upgrade            | <input type="checkbox"/> AG Office ID                               |
| <input checked="" type="checkbox"/> Agent Name         | <input type="checkbox"/> Agent Producer Code                        |
| <input checked="" type="checkbox"/> Base Premium       | <input checked="" type="checkbox"/> Booking Reference               |
| <input type="checkbox"/> By Email                      | <input type="checkbox"/> By Mail                                    |
| <input type="checkbox"/> By Reg.Mail                   | <input type="checkbox"/> Campaign Code                              |
| <input type="checkbox"/> Category                      | <input type="checkbox"/> Commission                                 |
| <input type="checkbox"/> Cover Type Code               | <input type="checkbox"/> Cover Type Name                            |
| <input type="checkbox"/> Credit Card Type              | <input checked="" type="checkbox"/> Customer Payment Type           |
| <input type="checkbox"/> Destination                   | <input type="checkbox"/> Discount Amount                            |
| <input type="checkbox"/> Discount Code                 | <input type="checkbox"/> Distribution Channels                      |
| <input type="checkbox"/> Document Number               | <input type="checkbox"/> Endorsement or Cancellation Effective Date |
| <input type="checkbox"/> Excess Level                  | <input checked="" type="checkbox"/> GST / SST                       |
| <input type="checkbox"/> Installments                  | <input type="checkbox"/> Insured Name                               |
| <input type="checkbox"/> Is SMS Send                   | <input type="checkbox"/> Issuance Date                              |
| <input type="checkbox"/> Levy                          | <input type="checkbox"/> Master Policy Number                       |
| <input checked="" type="checkbox"/> Max. Trip Duration | <input type="checkbox"/> Membership                                 |
| <input type="checkbox"/> Membership Number             | <input type="checkbox"/> MID                                        |
| <input type="checkbox"/> Nationality                   | <input type="checkbox"/> Net Premium                                |
| <input type="checkbox"/> No of Persons                 | <input type="checkbox"/> Not Receive Marketing                      |
| <input type="checkbox"/> Not Receive Marketing - Email | <input type="checkbox"/> 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 page. On the left sidebar, the search icon (magnifying glass) is circled in red. The main search area has a dropdown menu for 'Policy No.' with 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 as 'Agent Portal (110 Results)' and 'Legacy CRS (667 Results)'. Three policy results are shown, each with details like Policy No., Product, Plan, Travel Period, and Policyholder.

| Policy No.     | Product                       | Plan                        | Travel Period           | Policyholder    |
|----------------|-------------------------------|-----------------------------|-------------------------|-----------------|
| HASHKAA0007666 | HK Travelsure Protection Plan | Single Trip - Standard Plan | 26/03/2025 - 30/03/2025 | LetyKPM ZHKnsFD |
| HASHKAA0007664 | HK Travelsure Protection Plan | Single Trip - Standard Plan | 25/03/2025 - 29/03/2025 | MzFlPyM ZMKuMPz |
| HASHKAA0007656 | HK Travelsure Protection Plan | Single Trip - Standard Plan | 25/03/2025 - 29/03/2025 | 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

17 Add Filter

Agent Portal (123 Results)

Legacy CRS (962 Results)

CTA3CAA4077R1  
22/03/2025  
Sold  
Product: HK Chubb TravelWell Annual Protection Plan  
Plan: Plan 1 (Annual)  
Travel Period: 01/04/2025 - 31/03/2026  
Policyholder: Amy Amy Test  
Br/Hk2b  
CHUBB Hong Kong  
CDTWTA2002

CTA1CAA5329R1  
22/03/2025  
Sold  
Product: HK Chubb TravelWell Annual Protection Plan  
Plan: Plan 1 (Annual)  
Travel Period: 22/03/2025 - 21/03/2026  
Policyholder: Mr Test M  
Hkps1.Br  
CHUBB Hong Kong  
CDTWTA2002

CTA1CAA5329E1  
22/03/2025  
Policy / Renewed  
Product: HK Chubb TravelWell Annual Protection Plan  
Plan: Plan 1 (Annual)  
Travel Period: 01/03/2024 - 28/02/2025  
Policyholder: Mr Test M  
Hkps1.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.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     | 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           | Hghghddsf          |
| Post Code         |                    |
| Telephone         |                    |
| Mobile Phone      |                    |
| Email Address     | amy.kvok@chubb.com |
| Membership ID     |                    |

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# Renew Policy 續保年單

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# Renew Policy 續保年單

The screenshot shows the AGENTPORTAL interface. A search bar at the top contains 'Policy No.' and '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, and a blue box highlights the policy number 'CTA1CAA5069' in the results list. The results list shows the following details:

| 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  |

Below the results list, there is a 'Showing 1 - 1 of 1 Records' indicator and an 'Export' button. A 'Renew Policy 續保年單' button is also visible at the bottom right of the results area.

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 *              | <input checked="" type="radio"/> Individual <input type="radio"/> 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 | <input type="checkbox"/> Email to Agent                   |
| HKID/Passport No * | E757880A                                                |           |        |                 | <input checked="" type="checkbox"/> Email to Policyholder |
|                    | <input type="radio"/> ID <input type="radio"/> 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 : https1.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

https1.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