

Registration Process for Bulk Re -Renewal Transfer Candidates

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

Steps

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

Step 1 : Preparation of excel file

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

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

	A	B	C	D	E	F	G
1	PAN NUMBER	CERTIFICATION NUMBER	OLD CERTIFICATION	EMAIL ID	MOBILE		
2	ABCDE1234F	SP0012345678	SP1004567890	abc@gmail.com	9123456789		
3	FGHIJ7869K	SP0012345698	SP2004509876	xyz@gmail.com	6543219870		
4							
15							
16							
17							

Step 2 : Upload excel file for repayment

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

The screenshot shows the IRDAI website navigation menu with the following items:

- Home
- About us
- Examinations
- Exam Registration
- IRDAI Examinations
- Study Material
- Affiliates
- Sitemap
- Circulars
- Personnel
- Report

The 'Upload Data Bulk Payment' option is circled in red in the screenshot.

Registration Process for Bulk Re -Renewal Transfer Candidates

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

The first screenshot shows the 'Payment Type' dropdown menu open, with 'payment for CA Re-Renewal Transfer Bulk Online Training' selected. The 'Upload List of' dropdown is also open, showing 'Details of Transfer Candidate' as the selected option.

The second screenshot shows the 'Payment Type' dropdown set to 'payment for CA Re-Renewal Transfer Bulk Online Training' and the 'Select Type of Intermediary' dropdown set to 'Corporate Agent'. The 'Upload List of' dropdown is still open, with 'Details of Transfer Candidate' selected.

The third screenshot shows the 'Payment Type' dropdown set to 'payment for CA Re-Renewal Transfer Bulk Online Training' and the 'Select Type of Intermediary' dropdown set to 'Corporate Agent'. The 'Upload List of' dropdown is now closed, and the 'File' field shows 'No file chosen'.

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

The screenshot shows the 'File' field with 'Choose File' circled in black, indicating the next step in the process.

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

The screenshot shows the 'File' field with the file name 'Transferupl...ormat (1).xls' circled in black, indicating that the file has been successfully uploaded.

After uploading below message will show on screen

The screenshot shows a success message: 'Total Records in File : 2' and 'Records uploaded successfully : 2'. Below the message, it says: 'Please go to the option "Renewal Bulk Payment" and select filter "Validate Transfer Candidate" and try to validate CA re-renewal transfer case data'.

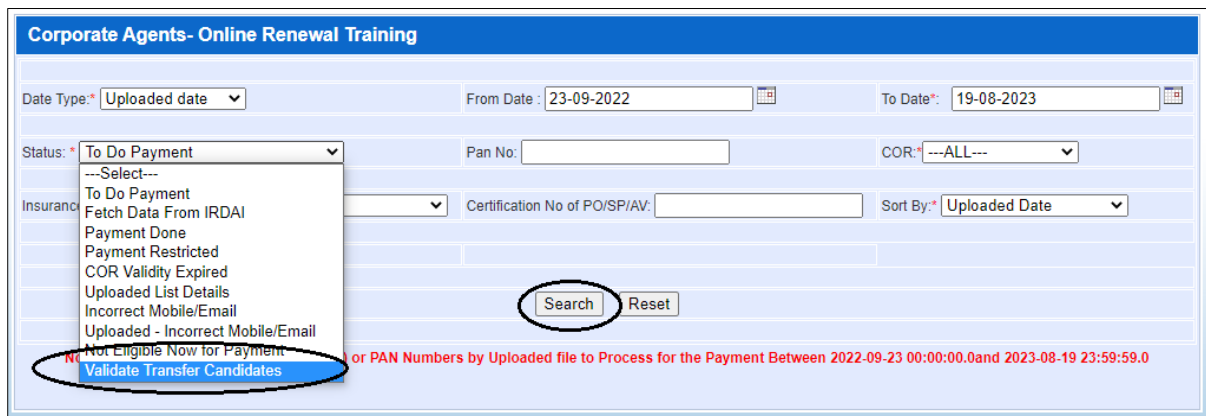
Registration Process for Bulk Re -Renewal Transfer Candidates

Step 3 : Payment

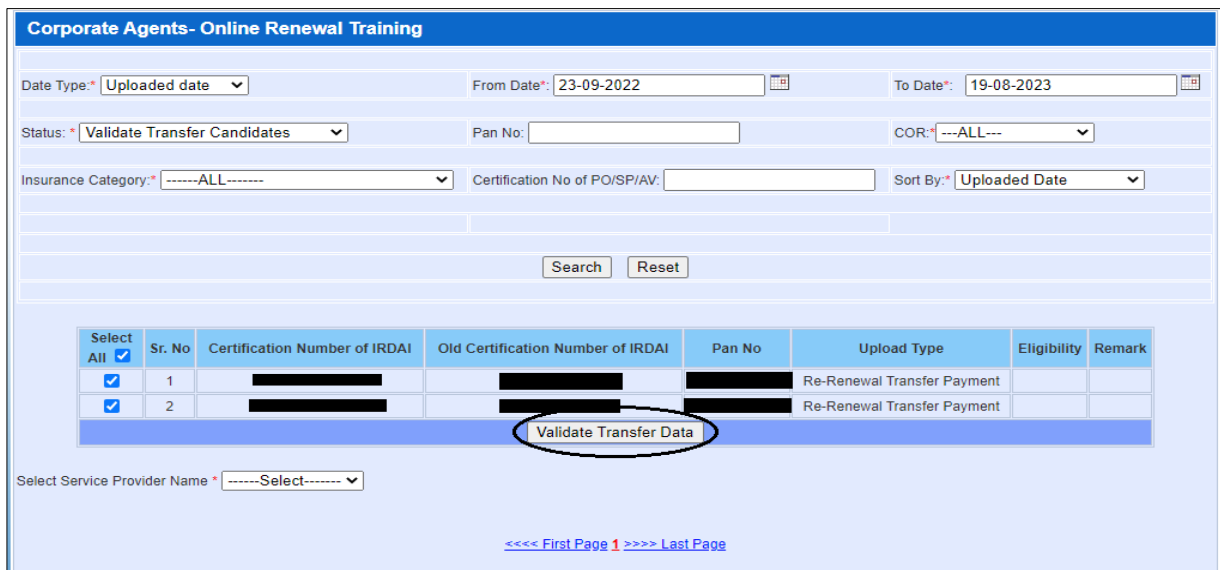
IRDAI Examianation –Corporate Agent – Renewal Online Training – Payment of Bulk Renewal



Select **Validate Transfer Candidate** option and click on search



Records will show on screen click on Validate Transfer data



Registration Process for Bulk Re -Renewal Transfer Candidates

After validating records below details will show on the screen

Corporate Agents- Online Renewal Training

Date Type: From Date: To Date:

Status: Pan No: COR: Certification No of PO/SP/AV: Sort By:

Select All	Sr. No	Certification Number of IRDAI	Old Certification Number of IRDAI	Pan No	Upload Type	Eligibility	Remark
<input type="checkbox"/>	1				Re-Renewal Transfer Payment	Eligible	No remarks
<input type="checkbox"/>	2				Re-Renewal Transfer Payment	Eligible	No remarks

Select Service Provider Name:

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Select option **To do payment** and click on **search**

Corporate Agents- Online Renewal Training

Date Type: From Date: To Date:

Status: Pan No: COR: Certification No of PO/SP/AV: Sort By:

Select All	Sr. No	Certification Number of IRDAI	Old Certification Number of IRDAI	Pan No	Upload Type	Eligibility	Remark
<input type="checkbox"/>	1				Re-Renewal Transfer Payment	Eligible	No remarks
<input type="checkbox"/>	2				Re-Renewal Transfer Payment	Eligible	No remarks

Select Service Provider Name:

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

Corporate Agents- Online Renewal Training

Date Type: From Date: To Date:

Status: Pan No: COR: Certification No of PO/SP/AV: Sort By:

Activity Type: To Update Data **To Make Payment**

Select All	Sr. No	Candidate Name	Pan No	Validity Date	Payment Status	Insurance Category	Certification Number of IRDAI	Email Id	Mobile No	COR Type
<input checked="" type="checkbox"/>	1			17-10-2022	To Do Payment	Composite Insurance				Specified Perso
<input checked="" type="checkbox"/>	2			17-10-2022	To Do Payment	Composite Insurance				Specified Perso

Please select the mode of payment: Online Web Wallet

Select Service Provider Name:

GSTIN State:

GSTIN No:

[Link to GSTIN](#)

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Registration Process for Bulk Re -Renewal Transfer Candidates

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

Renewal Online Training of Corporate Agents - Payment Confirmation	
Date : 23/09/2022	Order No : 82851022
Company Name	[REDACTED]
Email	[REDACTED]
Mobile	[REDACTED]
GSTIN Number	[REDACTED]
GSTIN State	Rajasthan
Payment Details	
Reference Id	1508
No Of Candidates	2
Payment for Training	1000.0
IGST	180.0
Grand Total	1180
You can make payment using your Credit/Debit card as well Internet Banking.	
Payment Charges	
Mode of Payment	Charges applicable
Internet Banking	Rs. 12 per Transaction
Debit Card (Visa / Master)	1.00% of Transaction Amount (Minimum Rs. 12/-)
Credit Card	1.50% of Transaction amount (Minimum Rs. 12/-)
Amex/Diners card	3.00% of Transaction amount (Minimum Rs. 12/-)
Wallet / Prepaid Card	Rs. 12 per Transaction
Minimum Charges	All Charges subject to a minimum of Rs. 12/- per transaction.
Mobile wallets / Cash cards	For PayTM wallet : 2.00% of Customer Payment Amount For all others: 1.75% of Customer Payment Amount
UPI / UPI QR	NIL
I have read and understood the Help Manual available on website. I agree that decision of Ill in all the matters will be final and binding upon me.	
Please Confirm	
<input type="button" value="Yes"/> <input type="button" value="No"/>	

After payment done successfully receipt will generate.