AIA Hong Kong

AIA Financial Centre,
712 Prince Edward Road East,
Kowloon, Hong Kong
T: (852) 2881 3333

AIA.COM.HK

Memo

Attn: All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong)

From: Redmund Chiu
Head of Underwriting

Co/Dept:

Dept: Operations

Copy: All Department Heads

Date: 16th Oct 2024

Total page: 6

Subject: (Ref: A241054)

新增電子遞交表格
Newly added e-Submission form

為配合公司的ESG理念，友邦香港將會在10月18日開始實施電子遞交表格功能，電子遞交表格將會取代部分實體下載表格。

電子遞交表格功能目的：

- 透過資料預填並簡化填表流程以及提高客戶體驗，並可以提高銷售流程效率。
- 幫助財務策劃顧問以縮短銷售流程時間，以便有更多時間接觸更多需要保護的客戶。
- 成為公司數碼轉型的基礎，在未來幾年保持競爭優勢。

有關 iPoS 更新後的詳情，請參閱附件1-4

如有任何查詢，請於 iEngage/PES 使用 Chatbot 進行查詢。

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Super Form / e-Submission form In order to correspond to the company's ESG philosophy, AIA Hong Kong has started to implement the e-form function and replace the physical download form in agency corner

e-Submission form aims to:

- **Improve customer experience** simplifying the form process through data pre-population, and efficient the sales process.
- Help the financial planner shorten the duration of their sales process to have **more time to reach out to more customers** who need protection.
- Become a **foundation for the company's digital transformation**, keeping its competitive advantage in the years to come.

For further details iPoS update, please refer to Appendix 1-4

Should you have any queries, please enquire by using Chatbot in iEngage/PES.

Regards,



Redmund Chiu

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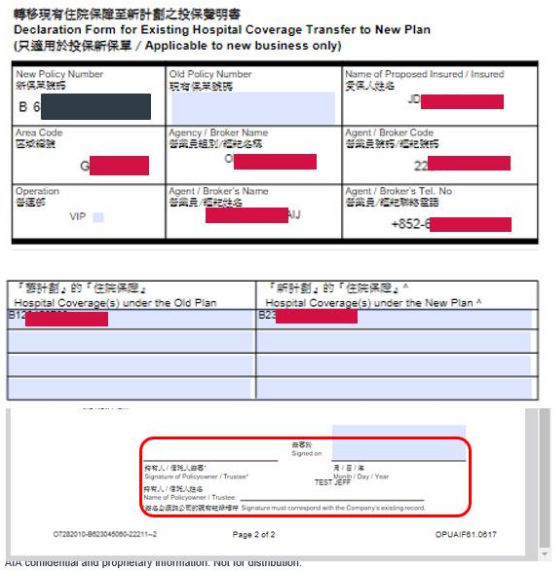
附件一 Appendix 1

Step 1



- Choose e-Submission form and enter policy number, then click next
- 選擇電子表格之後輸入保單號碼然後按下一步

Step 2



- Policy information and applicant / insured name will be pre-filled will be pre-filled
- 保單資料和受保人或申請人資料將會預填
- Fill in the info in the free text box and click next.
- 填寫必要資料在空格內

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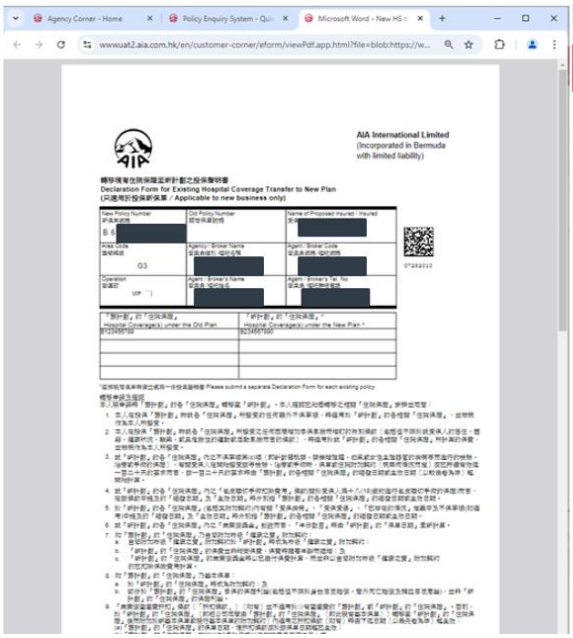
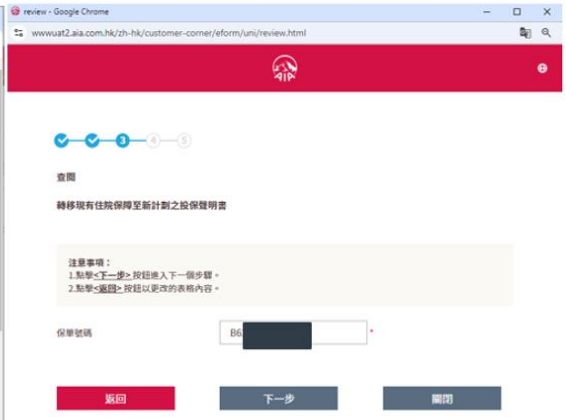
附件二 Appendix 2

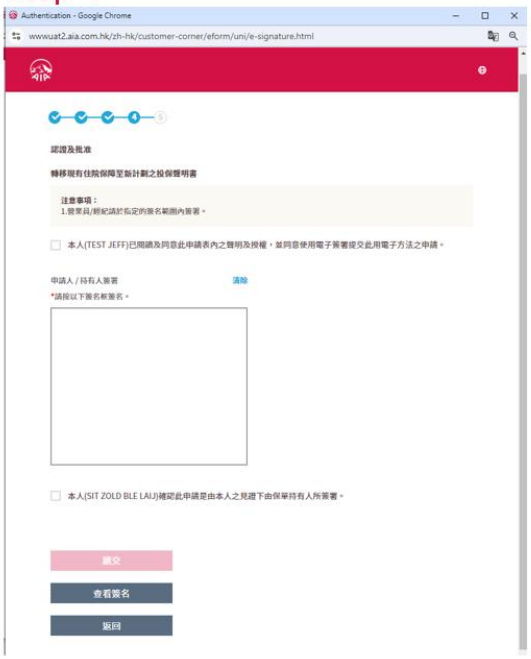
Step 3





Review the filled in information and click NEXT to proceed.
確認輸入資料後並按下一步

Step 4



- No remote signature for e-Submission
- 電子遞交表格並不支援遠距簽署功能
- Tick the declaration checkbox
- 按下聲明選項
- All signatures are mandate to sign before submission.
- 所有簽名表格都必須簽下並按遞交

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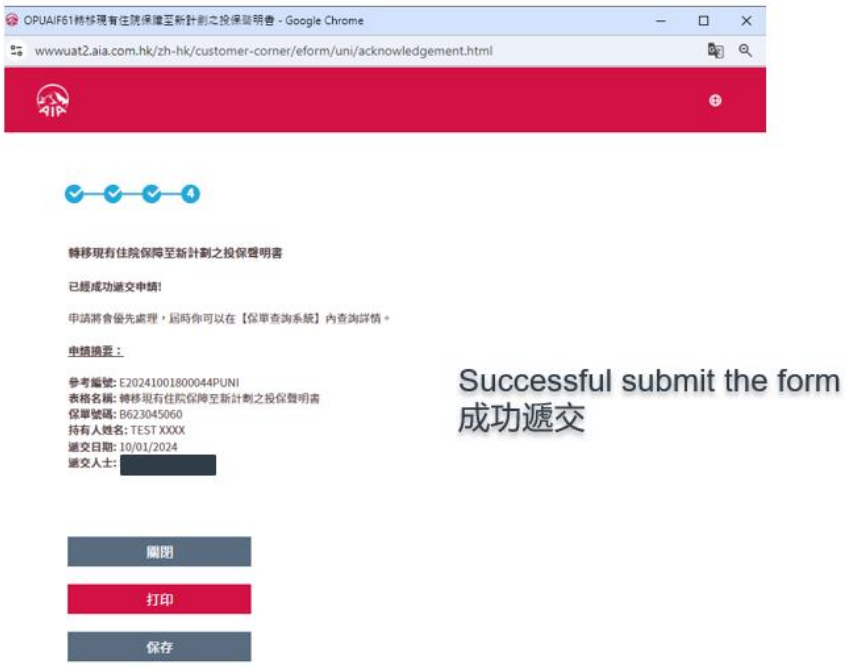
附件三 Appendix 3

Step 5



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附件四 Appendix 4

E- Submission Form Listing
電子遞交表格列表

Expected First Round 預計首輪推出 (18 Oct 2024)

Form No.	Form Name
OPUAIF05	Simplified Underwriting Form
OPUAIF61	Declaration Form For Existing Hospital Coverage Transfer To New Plan
OPUAIF61(VPPM)	Declaration Form for Existing Hospital Coverage Transfer to VHIS Certified Plan / Specified Medical Plan
OPUAIFA47	Letter of Consent / Authorization Form for Attending Physician''s Statement (APS)
OPUAIF61(VHISC)	Declaration Form for VHIS Certified Plan conversion (for exercise of Currency Exchange Option)
OPUAIF09(PACSIO)	AMENDMENT TO APPLICATION FOR POLICY(PAC SIO)
OPUAIFA46(BPVSD)	BONUS POWER VANTAGE/GLOBAL POWER SERIES - SPECIAL DECLARATION FORM
OPUAIF09(JAPAN)	Customer Declaration of Residency Status
OPUAIFA70	Declaration for Designating Cohabiting Domestic Partner / Boyfriend / Girlfriend As Beneficiary
OPUAIFA69	Declaration for Married Partner / Civil Partner as Applicant
OPUAIF09(NPHK)	DECLARATION FOR NON-PERMANENT HKID/NON-PERMANENT MACAU ID CARD HOLDER
OPUAIF09(OYS)	Declaration form - Simple Care Essence series convert to On Your Side Plan series
OPUAIFC4	Declaration Form Non-Hong Kong ID Cardholders
OPMCUF35	Declaration Form Non-Macau ID Cardholders
OPMCUF40	Declaration of Customers'' Understanding on Premium Information (Macau)
OPUAIF83	Designation Of Trustee Of A Minor Beneficiary Form
OPUAIFA12	Important Facts Statement for Mainland Policyholders ("IFS-MP") (for PRC license agent use only)
OPMCUF12	Important Facts Statement for Mainland Policyholders ("IFS-MP")-Macau
OPUAIFA46(AIAOA)	Simplified Underwriting Form- For Selected Customers
OPUAIF09(WE2)	Wealth Elite 2-Sapphire / Wealth Elite 2-Ruby - SIO Declaration Form

Expected Second Round 預計第二輪推出 (15 Nov 2024)

Form No.	Form Name
OPUAIF04	Simplified Underwriting Form Level-Up Protect Cancer Plan
OPUAIFA9E	Important Facts Statement And Applicant's Declaration Form - 2-in-1 Protection Linked Plan(ENG)
OPUAIFA9E(PLPRP)	Important Facts Statement And Applicant's Declaration Form - 2-in-1 Protection Linked Plan(ENG) (RP)
OPUAIFA9C	Important Facts Statement and Applicant's Declaration Form – 2-IN-1 Protection Linked Plan(CHI)
OPUAIFA9C(PLPRP)	Important Facts Statement and Applicant's Declaration Form – 2-IN-1 Protection Linked Plan(CHI) (RP)
OPUAIFA9E(STAFF)	Important Facts Statement and Applicant's Declaration Form – 2-IN-1 Protection Linked Plan(Staff Privilege)(ENG)
OPUAIFB9E	Important Facts Statement And Applicant's Declaration ILAS Policy (HK Brokers & IFA) - 2-in-1 Protection Linked Plan(ENG)
OPUAIFB9E(PLPRP)	Important Facts Statement And Applicant's Declaration ILAS Policy (HK Brokers & IFA) - 2-in-1 Protection Linked Plan(ENG)(RP)
OPUAIFB9C	Important Facts Statement and Applicant's Declaration ILAS Policy (HK Brokers & IFA) – 2-IN-1 Protection Linked Plan(CHI)
OPUAIFB9C(PLPRP)	Important Facts Statement and Applicant's Declaration ILAS Policy (HK Brokers & IFA) – 2-IN-1 Protection Linked Plan(CHI) (RP)
OPUAIFA3C	Important Facts Statement and Applicant's Declarations Form - Treasure Master Plus 2 (FOR HONG KONG POLICIES ONLY) (Chi)
OPUAIFA3E	Important Facts Statement and Applicant's Declarations Form - Treasure Master Plus 2 (FOR HONG KONG POLICIES ONLY) (Eng)
OPUAIFA3E(STAFF)	Important Facts Statement And Applicant's Declarations Form - Treasure Master Plus 2 (For Hong Kong Policies Only)(Staff)
OPMCUFA9C	Important Facts Statement and Applicant's Declaration ILAS Policy (Macau) – 2-IN-1 Protection Linked Plan (CHI)
OPMCUFA9E	Important Facts Statement and Applicant's Declaration ILAS Policy (Macau) – 2-IN-1 Protection Linked Plan (ENG)
OPMCUFA9E(STAFF)	Important Facts Statement and Applicant's Declaration ILAS Policy (Macau) – 2-IN-1 Protection Linked Plan (Staff Privilege) (ENG)
OPUAIFB1e	Important Facts Statement and Applicant's Declarations Form - Treasure Master Plus 2(FOR HONG KONG POLICIES ONLY) (Broker) (Eng)
OPUAIF76	Residence Questionnaire
OPUAIFA46(VMIS)	Simplified Underwriting Form-Voluntary Medical Insurance Scheme for Civil and Non-Civil Servants Employed by the Government
OPUAIFA48	Voluntary Health Insurance Scheme (VHIS) Supplementary Form
OPUAIF09(HEM)	Declaration Form For Insuring In More Than One High End Medical Product
OPUAIFA46(AOAECP)	Declaration form-AIA One Absolute - Full Protection series convert to Executive Care Pro 2
OPUAIFA67	Payor Information Form
OPUAIFA46	Simplified Underwriting Form - On Your Side Plan series - First Gift
OPUAIF05(FP2)	Simplified Underwriting Form (for Fortune Promise 2 only)
OPMCUFA3	Important Facts Statement And Applicant''''s Declarations ILAS Policy (Macau) - TMP (CHI)
OPMCUFA3	Important Facts Statement And Applicant''''s Declarations ILAS Policy (Macau) - TMP(ENG)
OPMCUFA4	Important Facts Statement And Applicant''s Declarations ILAS Policy (Macau) - Treasure Advantage 2 (CHI)
OPMCUFA4	Important Facts Statement And Applicant''s Declarations ILAS Policy (Macau) - Treasure Advantage 2 (ENG)

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