HEALTHIER, LONGER, BETTER LIVES

2024 新晉資深分區經理/資深分區經理晉升委任 — 電子申請指南

May 2024

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遞交委任申請

遞交新晉資深分區經理/資深分區經理委任申請及審批流程

申請資格：助理分區經理，分區經理及財務策劃顧問
遞交申請日期： 2024 年 6 月1 - 30日
上線營業單位主管及區域總監審批截止日期：申請日起28 個曆日內，至 2024 年 7 月 7 日（以較早者為準）

如上線營業位主管是區域總監
申請會直接由區域總監審批



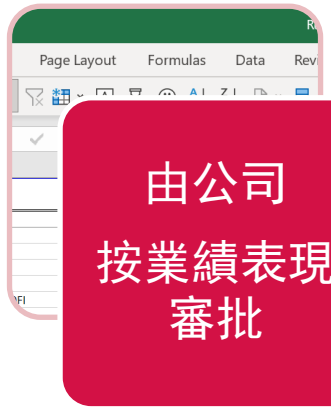
遞交 NSUM/SUM 委任申請



上線營業單位主管審批



區域總監審批



由公司按業績表現審批



最終由公司委任

申請狀態更新

審批提示

審批提示

審批期限：申請日起28 個曆日內，至 2024 年 7 月 7 日（以較早者為準）

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[AIA – INTERNAL]

遞交委任申請

步驟 1: 點擊此連結 或 備忘**A240556**，新晉資深分區經理委任電子申請表將在預設瀏覽器中開啟
1 此輪申請者最終成功晉升的委任生效日期為 **2024年7月1日**



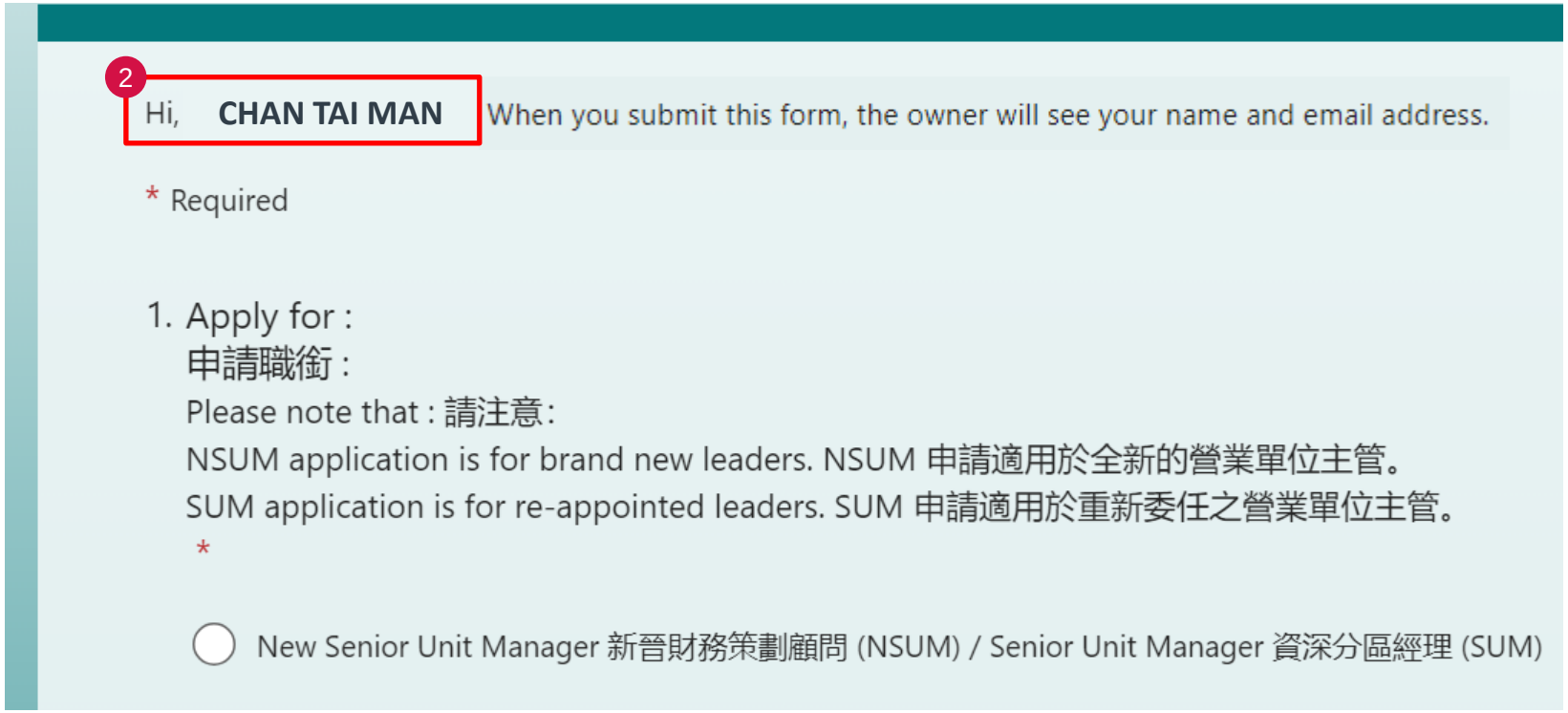
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[AIA – INTERNAL]

遞交委任申請

必須回答表格上**所有**標示 * 的問題

步驟 2: 點擊按扭 ○ 注明申請職銜，點擊後按扭轉為 ◉



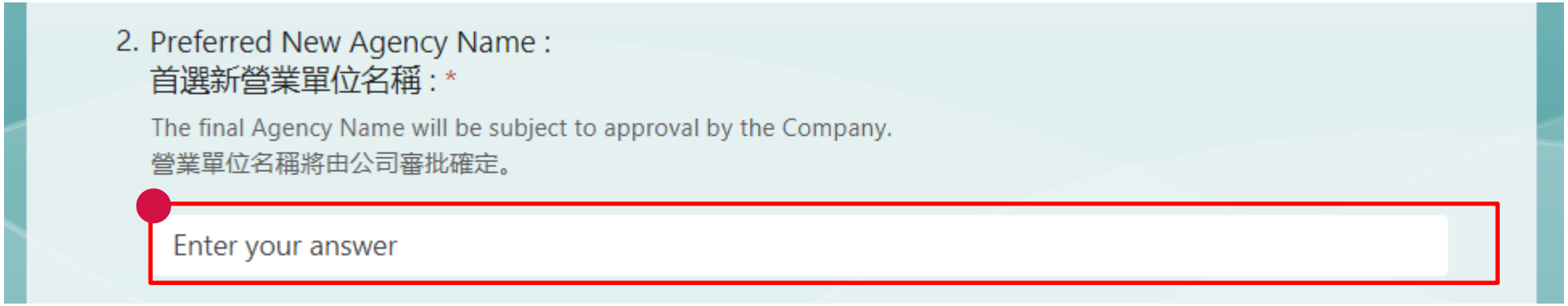
2 申請者的姓名將會於表格上顯示

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[AIA – INTERNAL]

遞交委任申請

步驟 3: 輸入一個首選新營業單位名稱

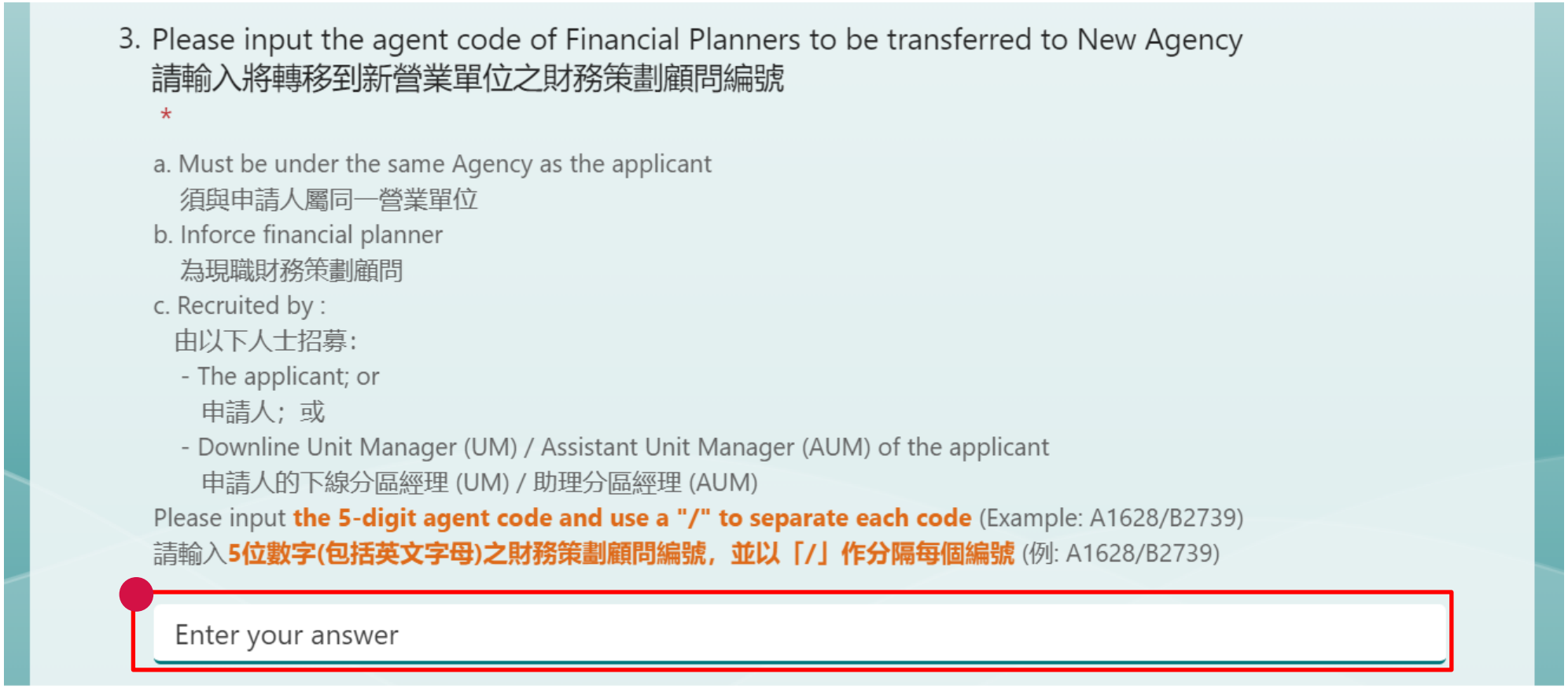


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[AIA – INTERNAL]

遞交委任申請

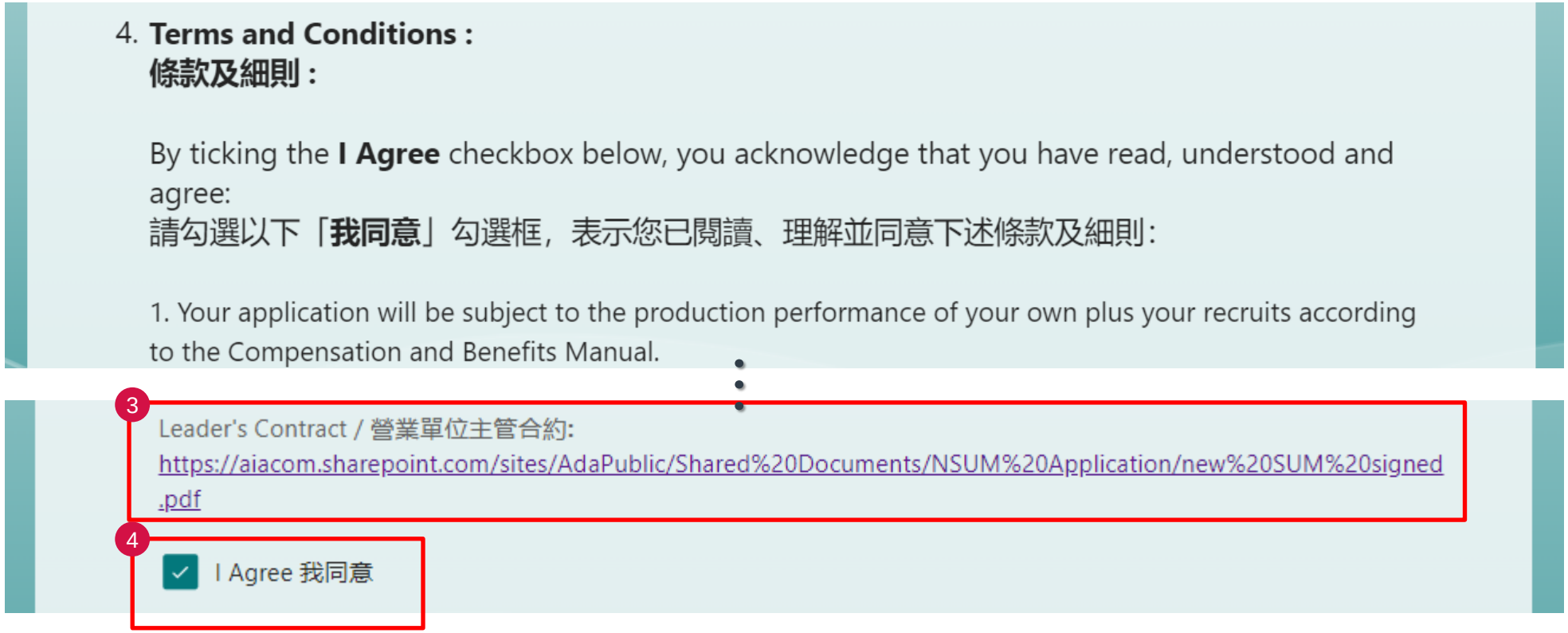
步驟 4: 輸入**5位數字(包括英文字母)之財務策劃顧問編號，並以「/」作分隔每個編號**（例: A1628/B2739)
將轉移到新營業單位之財務策劃顧問必須符合條件(a), (b) & (c)



[AIA – INTERNAL]

遞交委任申請

步驟 5: 點擊列載於申請表上的連結，閱讀❸營業單位主管合約
步驟 6: 勾選 ❹「**我同意**」勾選框，表示您已閱讀、理解並同意第四題所列之營業單位主管合約、條款及細則

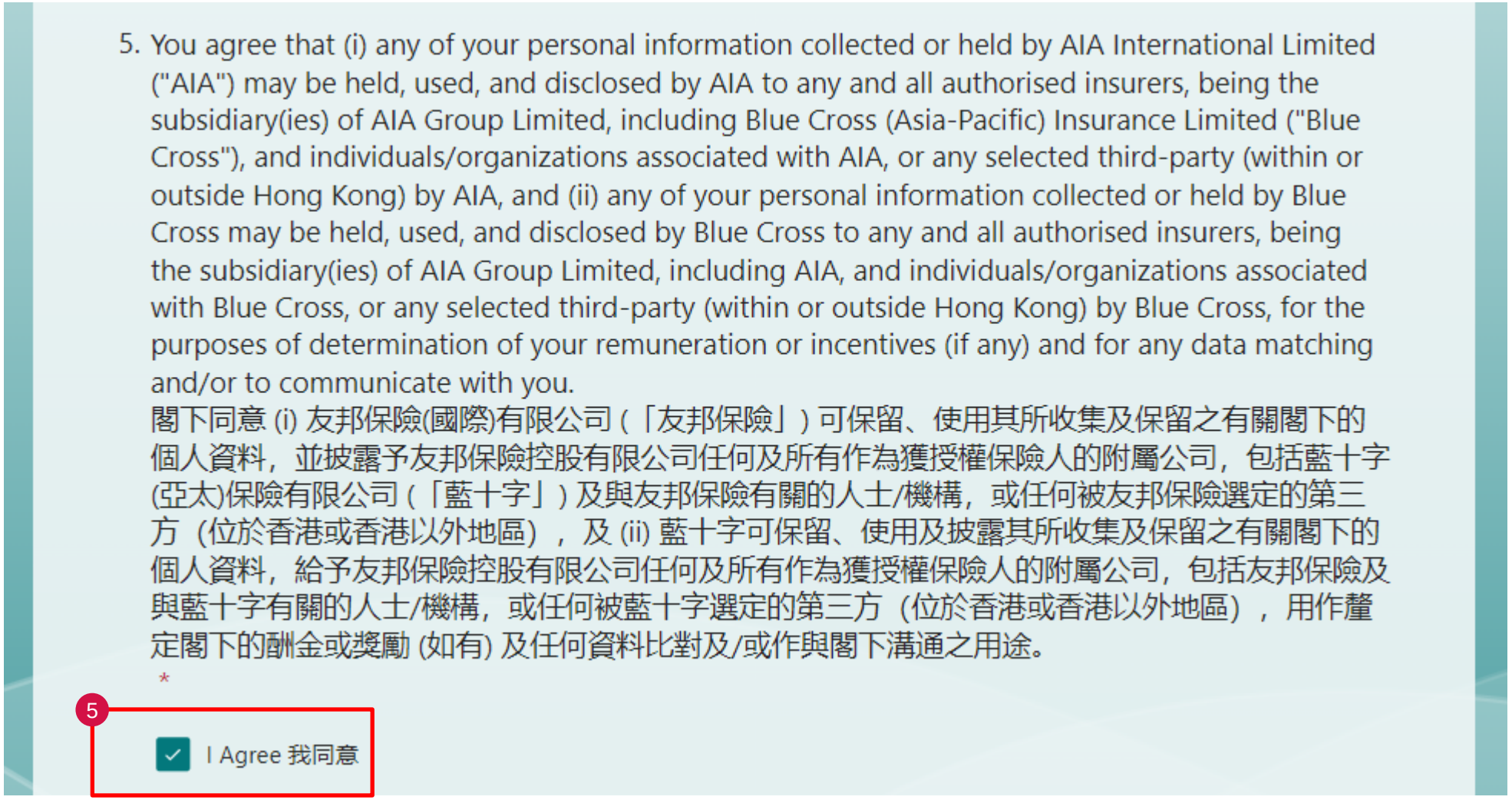


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遞交委任申請

步驟 7: 勾選 ❺「我同意」勾選框，表示您已閱讀、理解並同意第五題所列之條款及細則

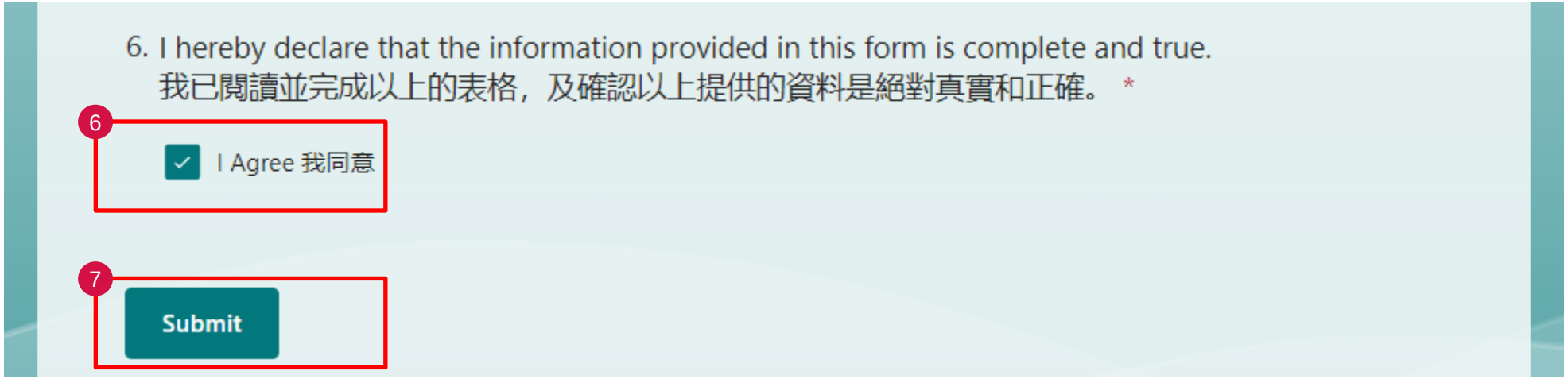


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遞交委任申請

步驟 8: 勾選 ❻「我同意」勾選框，表示您已完成此申請表格及確認所提供的資料是絕對真實和正確
步驟 9: 點擊 ❼ Submit 按扭遞交委任申請

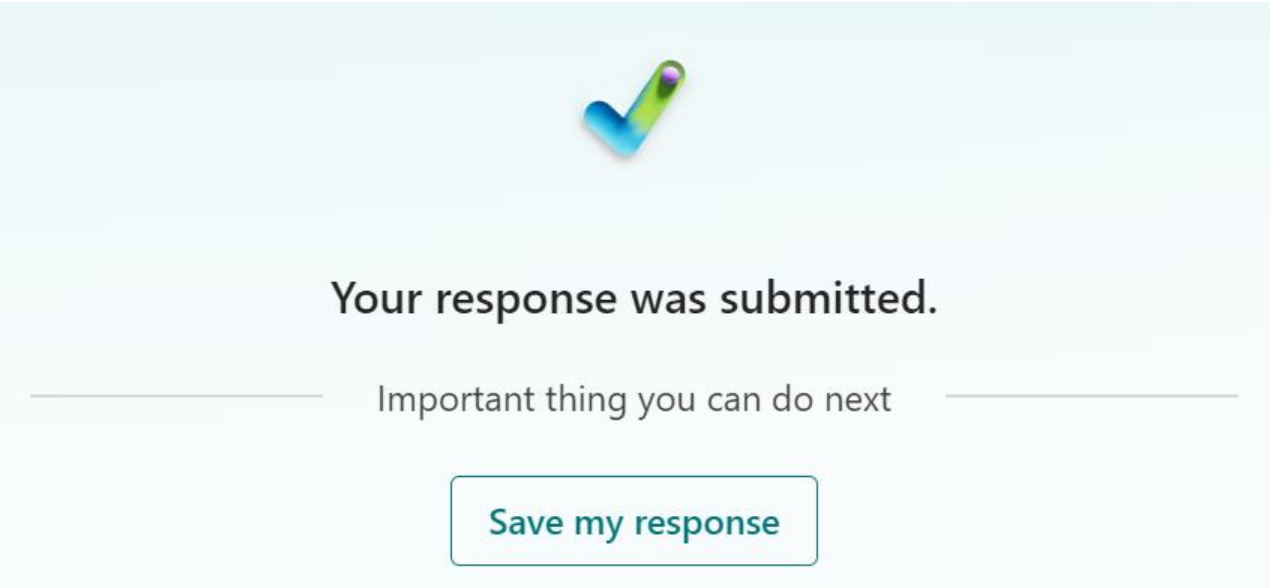


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遞交委任申請

提交後將顯示之確認頁面



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遞交委任申請

申請者將透過電郵收到申請確認：**“新晉資深分區經理/資深分區經理委任申請 - 已遞交”**

新晉資深分區經理/資深分區經理委任申請 - 已遞交 Application for NSUM/SUM Appointment – Submitted

aiahk.agency-digital-administration@aia.com
To CHAN TAI MAN

Reply | Reply All | Forward | ...
Thu 05/30/2024 4:50 PM

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

Your application for appointment has been submitted. The application is subject to the approval by your upline Agency Leader and/or District Director; and the production performance review and approval by the Company.

Applicant's Agent Code	Applicant's Name	Applicant's Agency Name	Applied Title	Appointment Effective Date
F2460	CHAN TAI MAN 2	Agency Name 2	New Senior Unit Manager (NSUM) / Senior Unit Manager (SUM)	01 July 2024

For any queries, please contact your respective Head of Agency Division or Agency Business Partner.
This is a system-generated message. Please do not reply to the sender.

您已遞交委任申請。有關申請需經您的上線營業單位主管及／或區域總監批准；及公司就您業績表現作審批。

財務策劃顧問編號	財務策劃顧問姓名	財務策劃顧問營業單位名稱	申請職銜	委任生效日期
F2460	陳大文 2	Agency Name 2	新晉資深分區經理（NSUM）／資深分區經理（SUM）	2024 年 07 月 01 日

如有查詢，請與您所屬的 Head of Agency Division 或 Agency Business Partner 聯絡。
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上線營業單位主管及區域總監審批流程

審批流程

遞交申請後，上線營業單位主管及區域總監須在申請日起**28個曆日**內，**至2024年7月7日**（以較早者為準），透過電郵 或 MS Teams 審批申請。

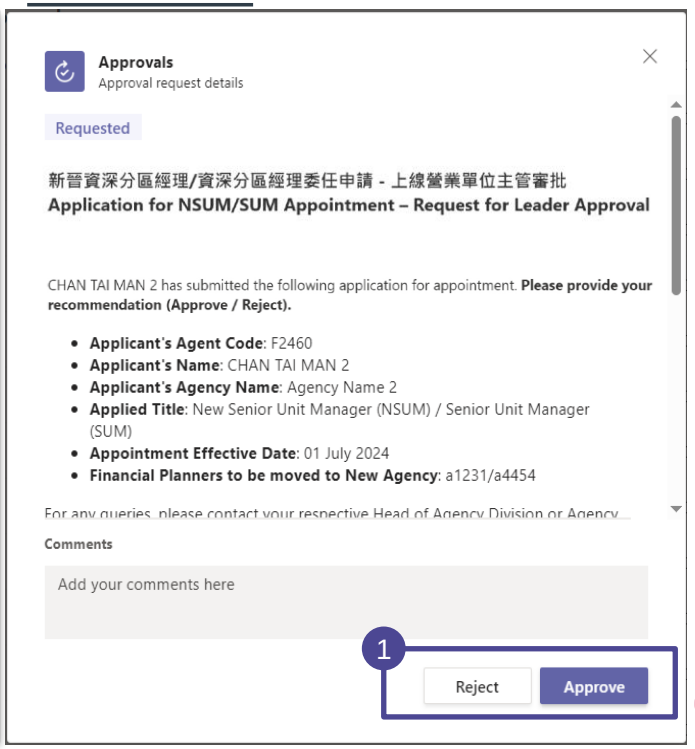
上線營業單位主管審批流程

1. 點擊 **Approve / Reject** (批准 / 退回) 按扭提交審批建議

Email



MS Teams



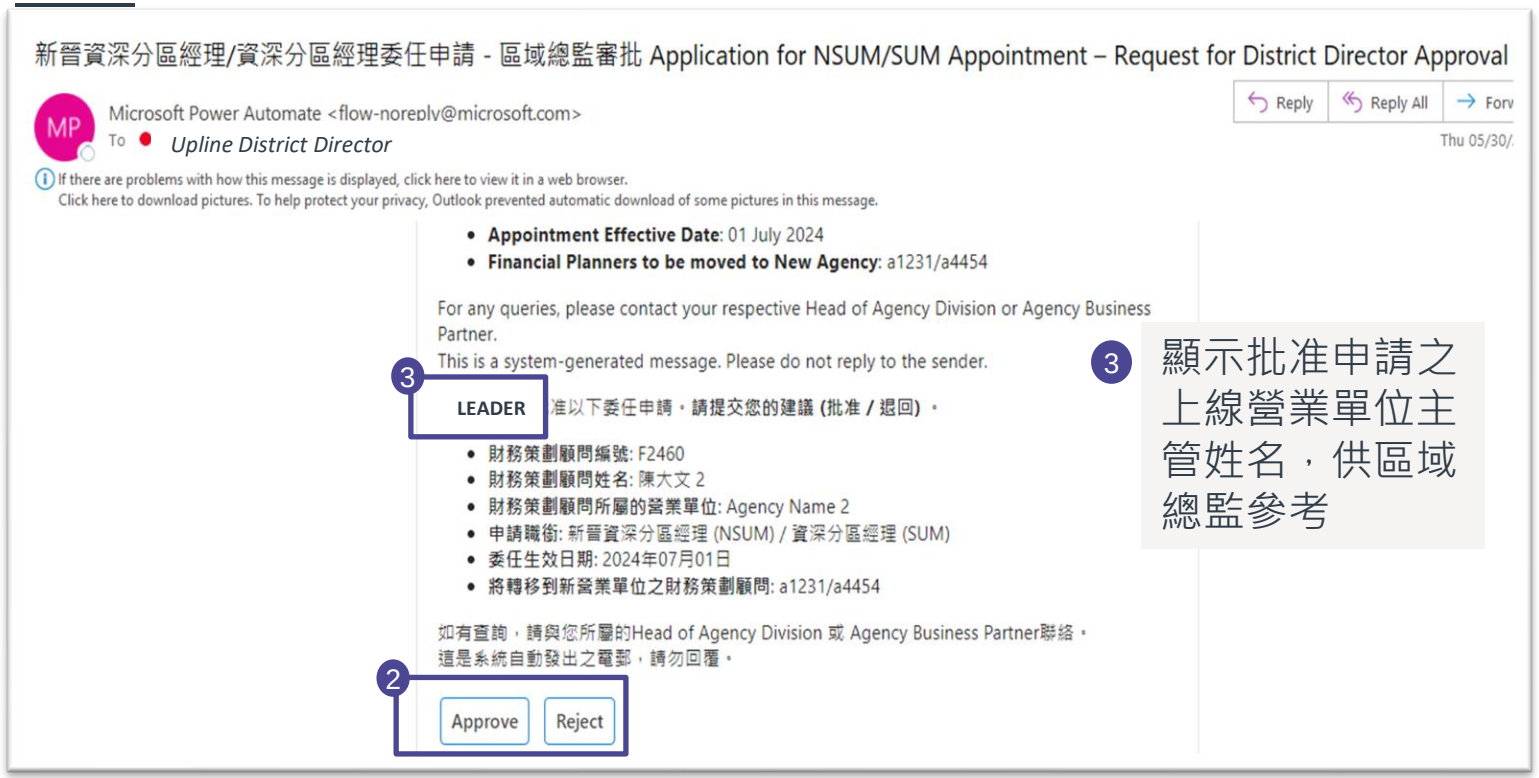
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[AIA – INTERNAL]

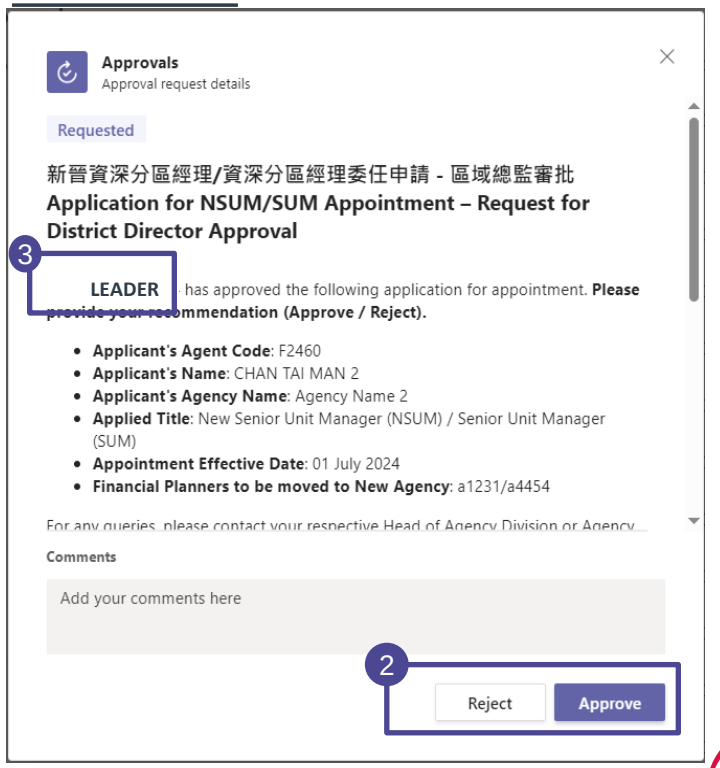
區域總監審批流程

當上線營業單位主管批准，上線區域總監將透過電郵及MS Teams收到審批請求：
“新晉資深分區經理/資深分區經理委任申請 - 區域總監審批”.
❷ 點擊 **Approve / Reject** (批准 / 退回) 按扭提交審批建議

Email



MS Teams



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上線營業單位主管及區域總監審批流程

如果申請仍在等待批准，將每 **3** 天向審核者 (上線營業單位主管或區域總監) 發送提示電郵及MS Teams 通知：
“[審批提示] 新晉資深分區經理/資深分區經理委任申請”

[審批提示] 新晉資深分區經理/資深分區經理委任申請 [Approval Reminder] Application for NSUM/SUM Appointment

aiahk.agency-digital-administration@aia.com

To *Upline Leader / DD*

Reply | Reply All | Forward | ...

Thu 05/30/2024 4:59 PM

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

CHAN TAI MAN 2 has submitted the following application for appointment. **Please be reminded to provide your recommendation (Approve / Reject) as soon as possible.**

Applicant's Agent Code	Applicant's Name	Applicant's Agency Name	Applied Title	Appointment Effective Date
F2460	CHAN TAI MAN 2	Agency Name 2	New Senior Unit Manager (NSUM) / Senior Unit Manager (SUM)	01 July 2024

For any queries, please contact your respective Head of Agency Division or Agency Business Partner.
This is a system-generated message. Please do not reply to the sender.

陳大文 2 已遞交以下委任申請。**請盡快提交您的建議（批准 / 退回）**。

財務策劃顧問編號	財務策劃顧問姓名	財務策劃顧問營業單位名稱	申請職銜	委任生效日期
F2460	陳大文 2	Agency Name 2	新晉資深分區經理（NSUM）/ 資深分區經理（SUM）	01 July 2024

如有查詢，請與您所屬的 Head of Agency Division 或 Agency Business Partner 聯絡。
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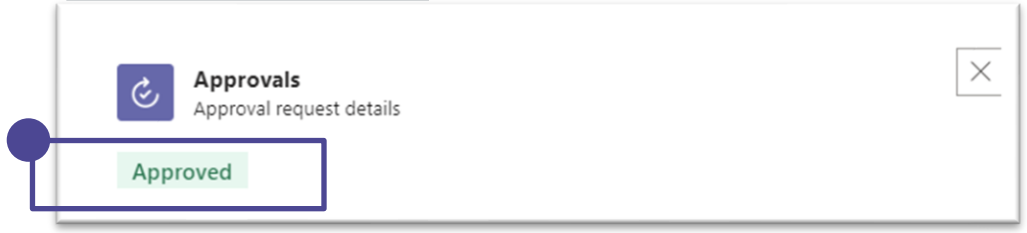
上線營業單位主管及區域總監審批流程

當上線營業單位主管或區域總監完成審批，MS Teams 上顯示的狀態將從 Requested (請求) 更改為 Approved / Rejected (批准 / 退回)。

審批前



審批後: 批准申請



審批後: 退回申請



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申請狀態更新

申請狀態更新

若申請獲批准，申請者將透過電郵收到申請狀態更新：
“新晉資深分區經理/資深分區經理委任申請 - 最新狀態”

新晉資深分區經理/資深分區經理委任申請 - 最新狀態 Application for NSUM/SUM Appointment – Update of Status

aiahk.agency-digital-administration@aia.com
To CHAN TAI MAN

Reply | Reply All | Forward | ...
Thu 05/30/2024 4:54 PM

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

Your application for appointment has been approved by your upline Agency Leader/District Director. The application is subject to the production performance review and approval by the Company.

Applicant's Agent Code	Applicant's Name	Applicant's Agency Name	Applied Title	Appointment Effective Date
F2460	CHAN TAI MAN 2	Agency Name 2	New Senior Unit Manager (NSUM) / Senior Unit Manager (SUM)	01 July 2024

For any queries, please contact your respective Head of Agency Division or Agency Business Partner.
This is a system-generated message. Please do not reply to the sender.

您的委任申請已經上線營業單位主管及／或區域總監批准。公司將就您的業績表現審批有關申請。

財務策劃顧問編號	財務策劃顧問姓名	財務策劃顧問營業單位名稱	申請職銜	委任生效日期
F2460	陳大文 2	Agency Name 2	新晉資深分區經理 (NSUM) / 資深分區經理 (SUM)	01 July 2024

如有查詢，請與您所屬的 Head of Agency Division 或 Agency Business Partner 聯絡。
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申請狀態更新

若申請被退回，申請者將透過電郵收到申請狀態更新：
“新晉資深分區經理/資深分區經理委任申請 - 最新狀態”

新晉資深分區經理/資深分區經理委任申請 - 最新狀態 Application for NSUM/SUM Appointment – Update of Status

aiahk.agency-digital-administration@aia.com
To CHAN TAI MAN

Reply | Reply All | Forward | ...
Thu 05/30/2024 5:09 PM

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

Your application has been returned by your upline Agency Leader/District Director, it won't be further proceed.

Applicant's Agent Code	Applicant's Name	Applicant's Agency Name	Applied Title	Appointment Effective Date
D0001	CHAN TAI MAN 17	Agency Name 17	New Senior Unit Manager (NSUM) / Senior Unit Manager (SUM)	01 July 2024

For any queries, please contact your respective Head of Agency Division or Agency Business Partner.
This is a system-generated message. Please do not reply to the sender.

您的委任申請已被上線營業單位主管及／或區域總監退回，不會作進一步處理。

財務策劃顧問編號	財務策劃顧問姓名	財務策劃顧問營業單位名稱	申請職銜	委任生效日期
D0001	陳大文 17	Agency Name 17	新晉資深分區經理（NSUM）／資深分區經理（SUM）	01 July 2024

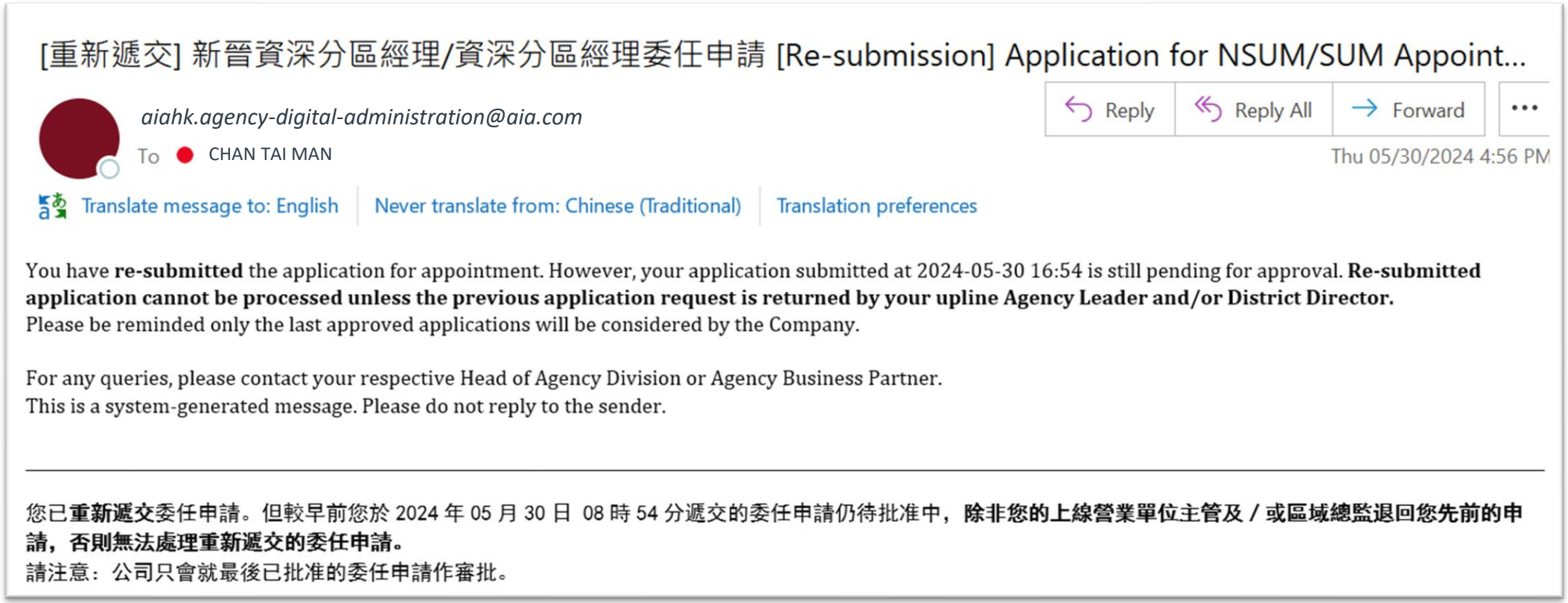
如有查詢，請與您所屬的 Head of Agency Division 或 Agency Business Partner 聯絡。
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重新遞交委任申請

如在先前提交的申請等待審批期間重新提交申請，申請者將會收到電郵提示：
“[重新遞交] 新晉資深分區經理/資深分區經理委任申請”
除非上線營業單位主管及／或區域總監退回先前的申請，否則無法處理重新遞交的委任申請。
公司只會就最後已批准的委任申請作審批。



[重新遞交] 新晉資深分區經理/資深分區經理委任申請 [Re-submission] Application for NSUM/SUM Appoint...

aiahk.agency-digital-administration@aia.com

To CHAN TAI MAN

Reply | Reply All | Forward | ...

Thu 05/30/2024 4:56 PM

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

You have **re-submitted** the application for appointment. However, your application submitted at 2024-05-30 16:54 is still pending for approval. **Re-submitted application cannot be processed unless the previous application request is returned by your upline Agency Leader and/or District Director.**
Please be reminded only the last approved applications will be considered by the Company.

For any queries, please contact your respective Head of Agency Division or Agency Business Partner.
This is a system-generated message. Please do not reply to the sender.

您已**重新遞交**委任申請。但較早前您於 2024 年 05 月 30 日 08 時 54 分遞交的委任申請仍待批准中，**除非您的上線營業單位主管及／或區域總監退回您先前的申請，否則無法處理重新遞交的委任申請。**
請注意：公司只會就最後已批准的委任申請作審批。

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[AIA – INTERNAL]

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謝謝