Electronic verification Learning Guide
電子驗證用戶指南
电子验证用户指南

THE REAL LIFE COMPANY

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請選擇語言：

電子驗證用戶指南，請按此

电子验证用户指南，请按此

Electronic verification Learning Guide, Please click here

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[AIA – INTERNAL]

使用說明目錄

1. 使用電子驗證作開立保險中介一站個人帳戶的目的及好處
2. 使用電子驗證
3. 開始電子驗證
4. 重新加載電子驗證結果
5. 如果電子驗證失敗，我可以怎樣重試電子驗證？
6. 連續四次電子驗證失敗，我可以豁免電子驗證嗎？
7. 如果我在遞交CR申請時仍未有機會與準招募會面，我可以豁免電子驗證嗎？
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9. 執行電子驗證時中斷流程
10. 電子驗證功能導覽手冊

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使用電子驗證作開立保險中介一站通個人帳戶的目的及好處

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使用電子驗證作開立保險中介一站通個人帳戶，助您省卻紙本繁覆步驟！



招募者

- 不需要再遞交紙本申請開立保險中介一站通個人帳戶
- 增加填寫準招募個人身份資料的準確度
- 加快招聘流程



準招募

- 無需填寫保監局保險中介一站通個人賬戶申請表格
- 省卻視像身份認證步驟
- 省卻上傳香港身份證副本的步驟

電子驗證提示：

- 只適用於香港及沒有有效的保險中介一站通個人帳戶的準招募
- 只適用於友招募 (iPad版)
- 完成電子驗證後會啟動「開立保險中介一站個人帳戶」流程
- 可以在招募者簽署CR申請表格進行電子驗證

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使用電子驗證

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開始電子驗證的3個入口點

A



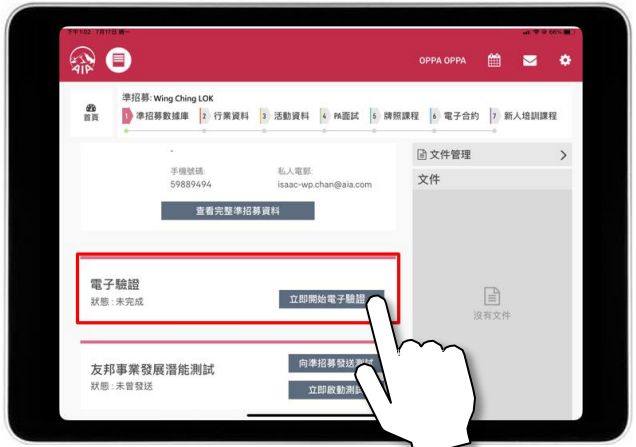
於新增準招募2/6的拍攝照片按鈕

B



點擊繼續按鈕進入編輯準招募資料
以按下拍攝照片按鈕

C



點擊立即開始電子驗證按鈕
進入編輯準招募資料 以按
下拍攝照片按鈕

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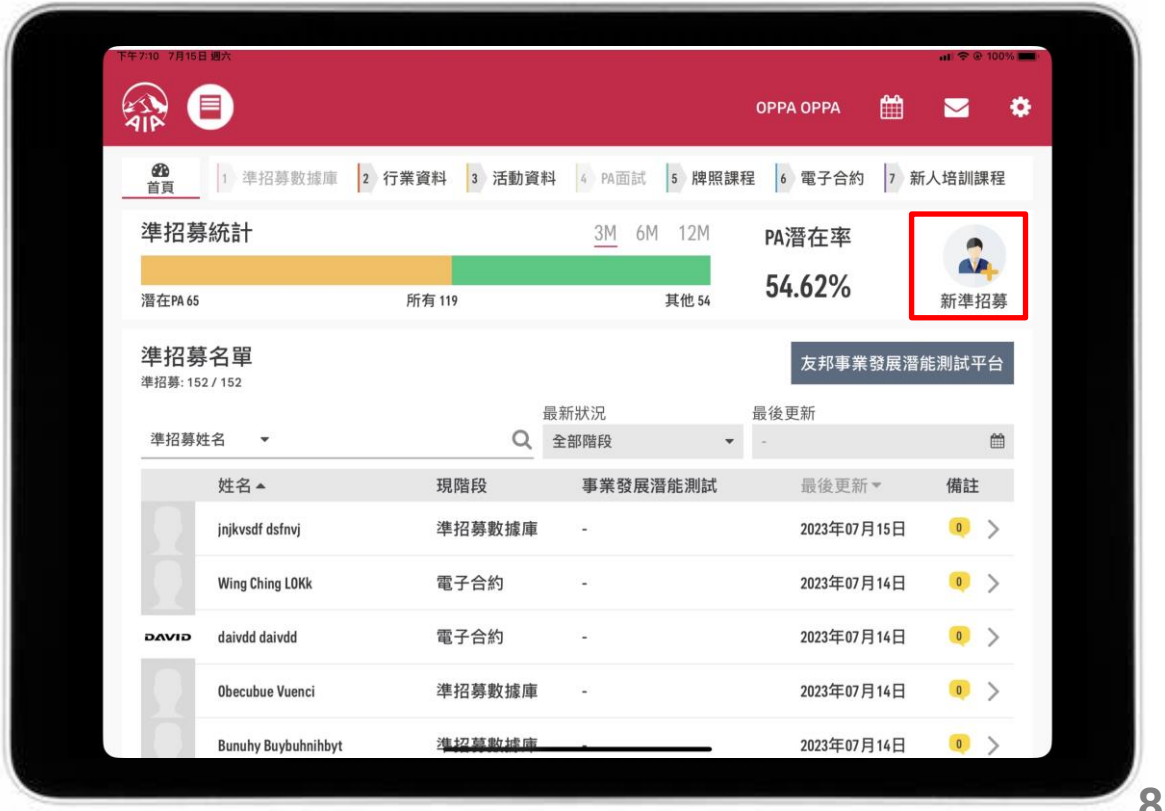
方法一：新增準招募

入口點 1 - 新增準招募

建立準招募檔案

1. 透過**智友易(AIA SMART)**登入**友招募 (iPad 版)**。
2. 點擊**新準招募**按鈕。
3. 輸入以下資料後點擊儲存按鈕：

- 英文名字
- 英文姓氏
- 手機號碼
- 電郵地址



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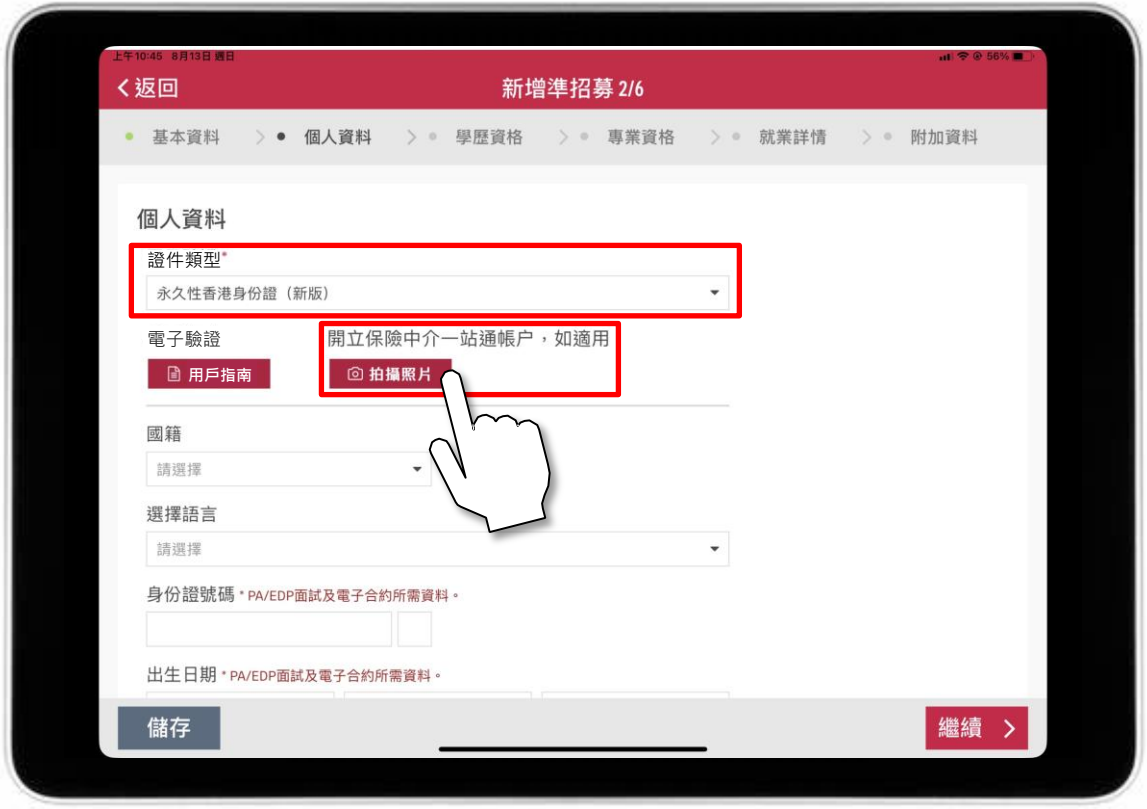
步驟 1：選項選擇證件類型

拍攝照片按鈕會被禁用當**未選擇證件類型**。

1. 在以下選項選擇證件類型：

- **永久性香港身份證（新版）**
- **永久性香港身份證（舊版）**
- **非永久性香港身份證（新版）**
- **非永久性香港身份證（舊版）**

2. 電子驗證**拍攝照片**按鈕會被啟用。



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方法二：在準招募數據庫的個人資料內

您可以在**個人資料**部份中進行電子驗證。 1. 在**準招募數據庫**當中的**個人資料**部份中按下**編輯**按鈕。



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步驟 1：選項選擇證件類型

拍攝照片按鈕會被禁用當**未選擇證件類型**。

1. 在以下選項選擇證件類型：
   - **永久性香港身份證（新版）**
   - **永久性香港身份證（舊版）**
   - **非永久性香港身份證（新版）**
   - **非永久性香港身份證（舊版）**
2. 電子驗證**拍攝照片**按鈕會被啟用。



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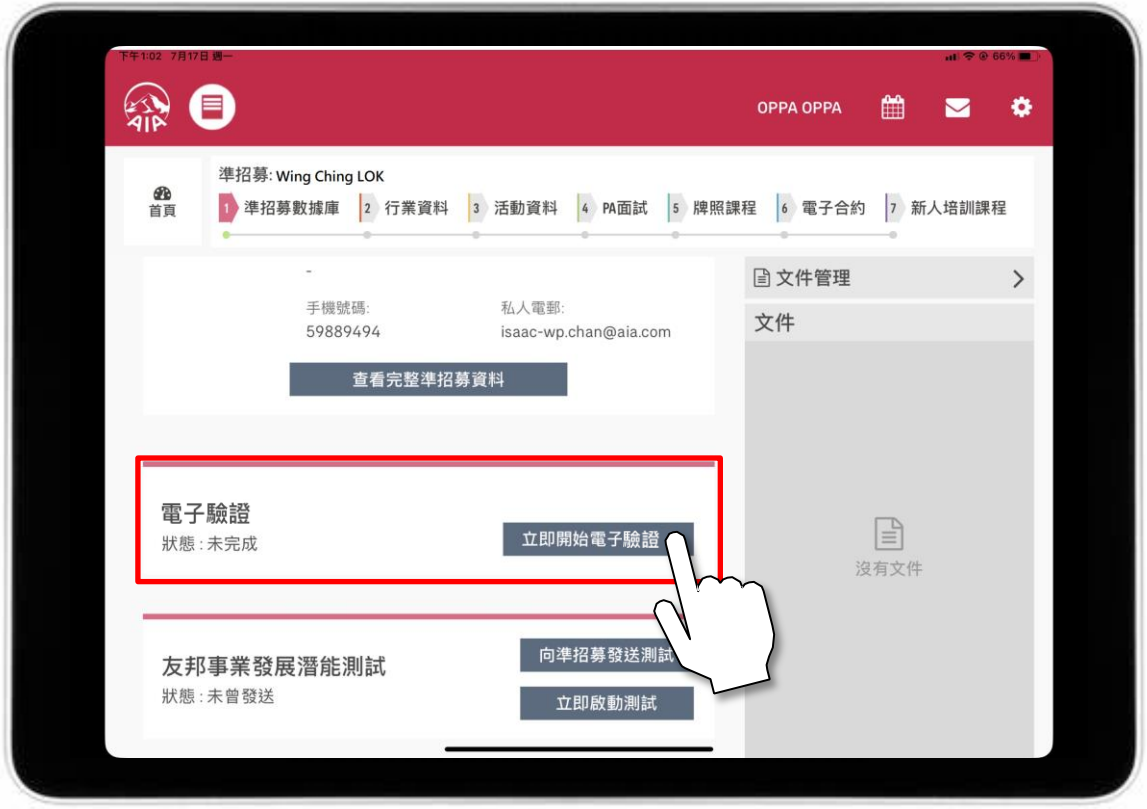
方法三：在準招募數據庫內

入口點 3 - 準招募数据库的電子驗證部份

您可以在電子驗證欄位中進行電子驗證。

1. 在**準招募數據庫**中按下**立即開始電子驗證**按鈕。
2. 系統會顯示電子驗證窗口，您可以和準招募一起進行電子驗證。



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步驟 1：選項選擇證件類型

入口点 3 -准招募数据库的电子验证栏位

拍攝照片按鈕會被禁用當**未選擇證件類型**。

1. 在以下選項選擇證件類型：

- **永久性香港身份證（新版）**
- **永久性香港身份證（舊版）**
- **非永久性香港身份證（新版）**
- **非永久性香港身份證（舊版）**

2. 電子驗證**拍攝照片**按鈕會被啟用。



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開始電子驗證

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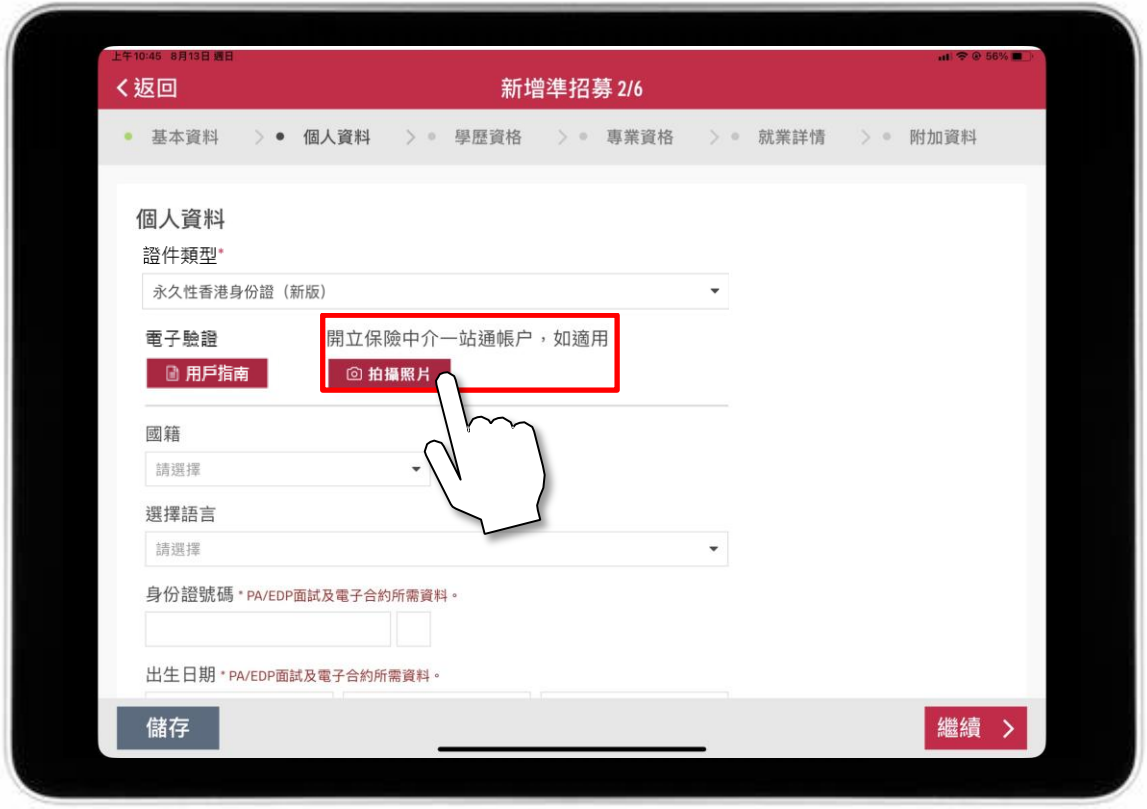
步驟 2：開始電子驗證

您和準招募進行電子驗證。

1. 按下**拍攝照片**按鈕。
2. 顯示電子驗證窗口。

提示：

- **準招募檔案上的準招募姓名和名字必須與準招募香港身份證上的姓名和名字一樣。**



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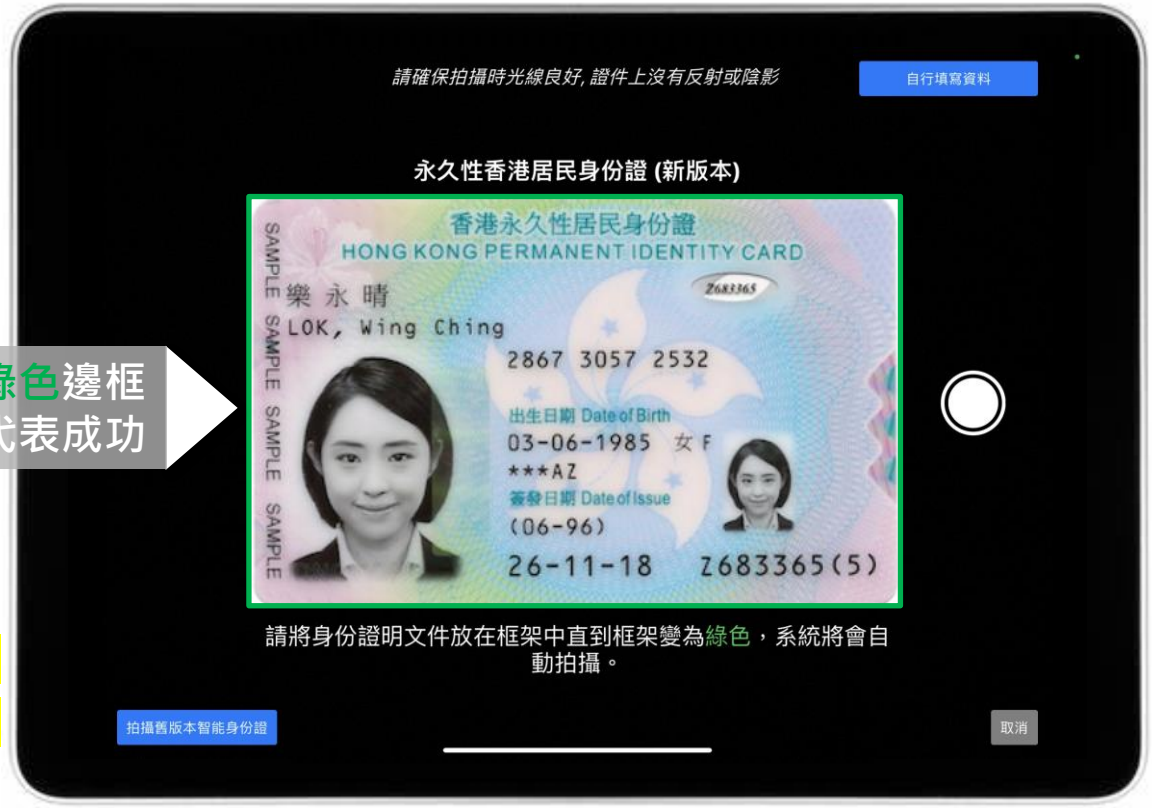
步驟 3：拍攝香港身份證的正面

自動拍攝香港身份證 將香港身份證放在框架中 如香港身份證成功貼合，擷取 邊框會由橙色變為綠色，**系統 會自動拍攝香港身份證**。



提示：

- **請確保光線充足。**
- **身份證沒有陰影或眩光。**
- **可將證件斜放45度角，以減少反光情形。**

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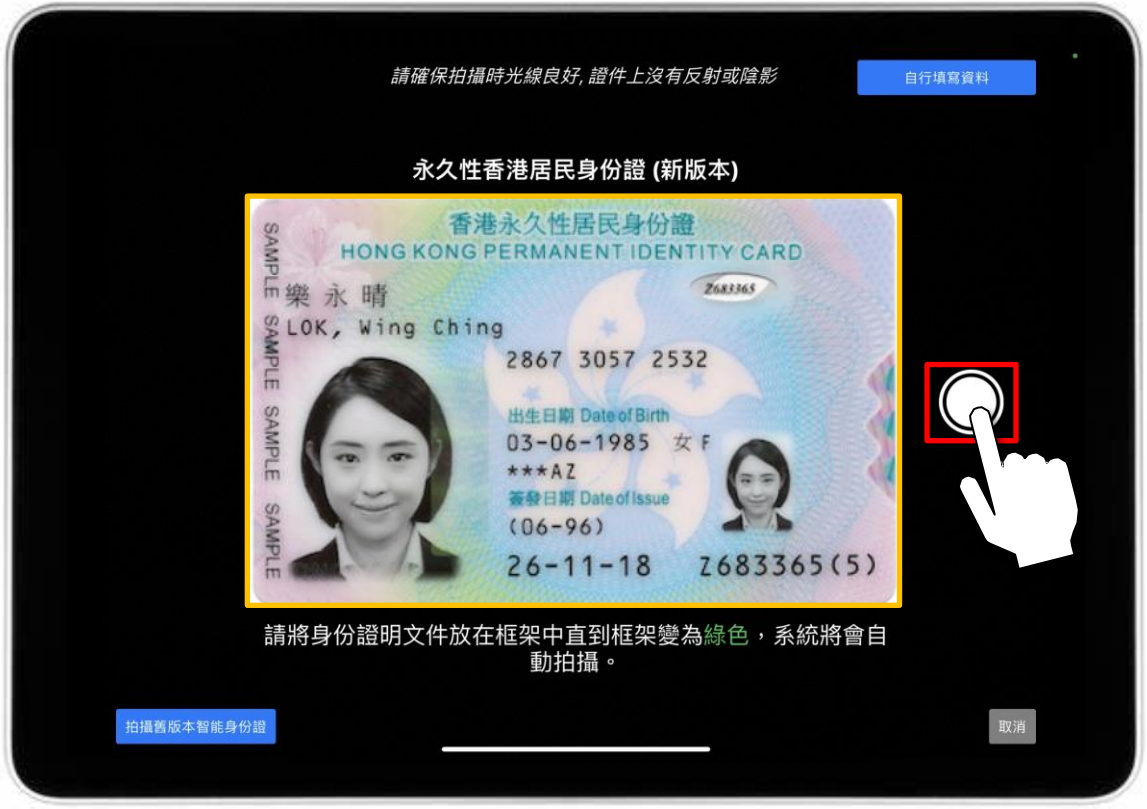
步驟 3：拍攝香港身份證的正面

手動拍攝香港身份證的正面

1. 將香港身份證放在框架中。
2. 按下**快門按鈕**以拍攝香港身份證。
3. 完成拍攝香港身份證的正面。
4. 系統顯示拍攝準招募的窗口。



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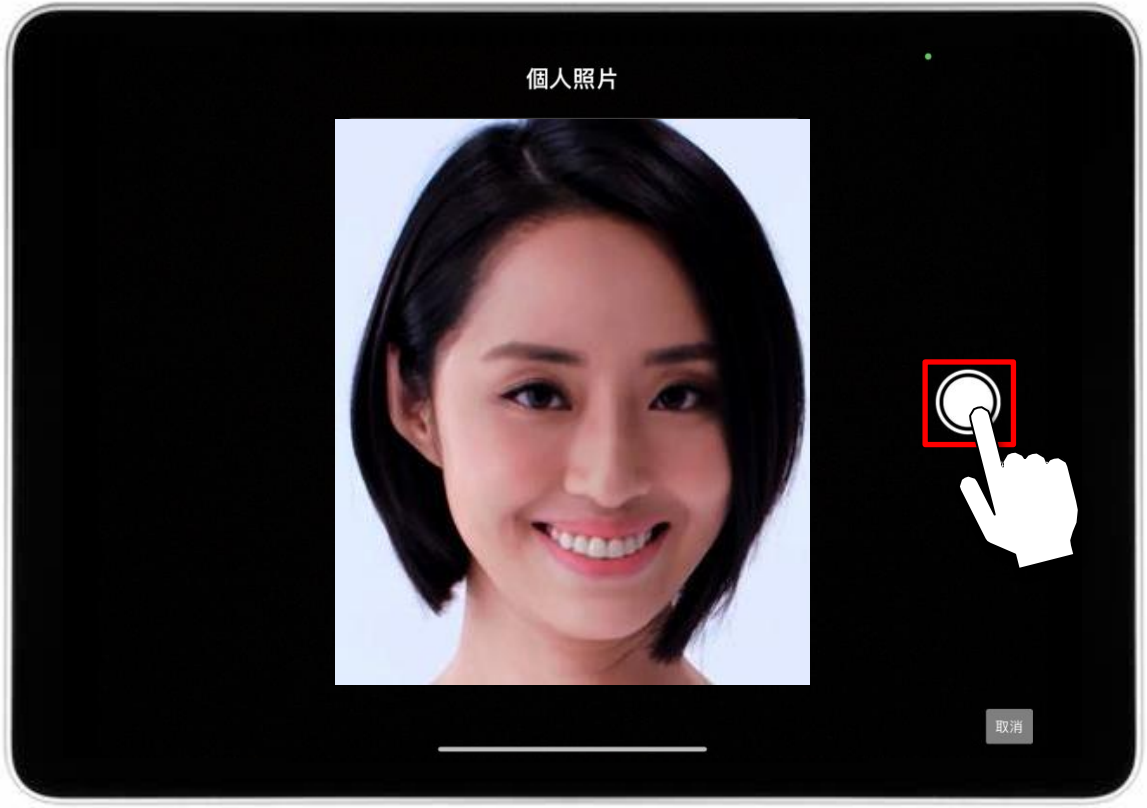
步驟 4：拍攝個人照片

拍攝準招募照片。

1. 拿穩裝置拍攝準招募的容貌
2. 點一下**快門按鈕**

系統顯示加載電子驗證結果的頁面。



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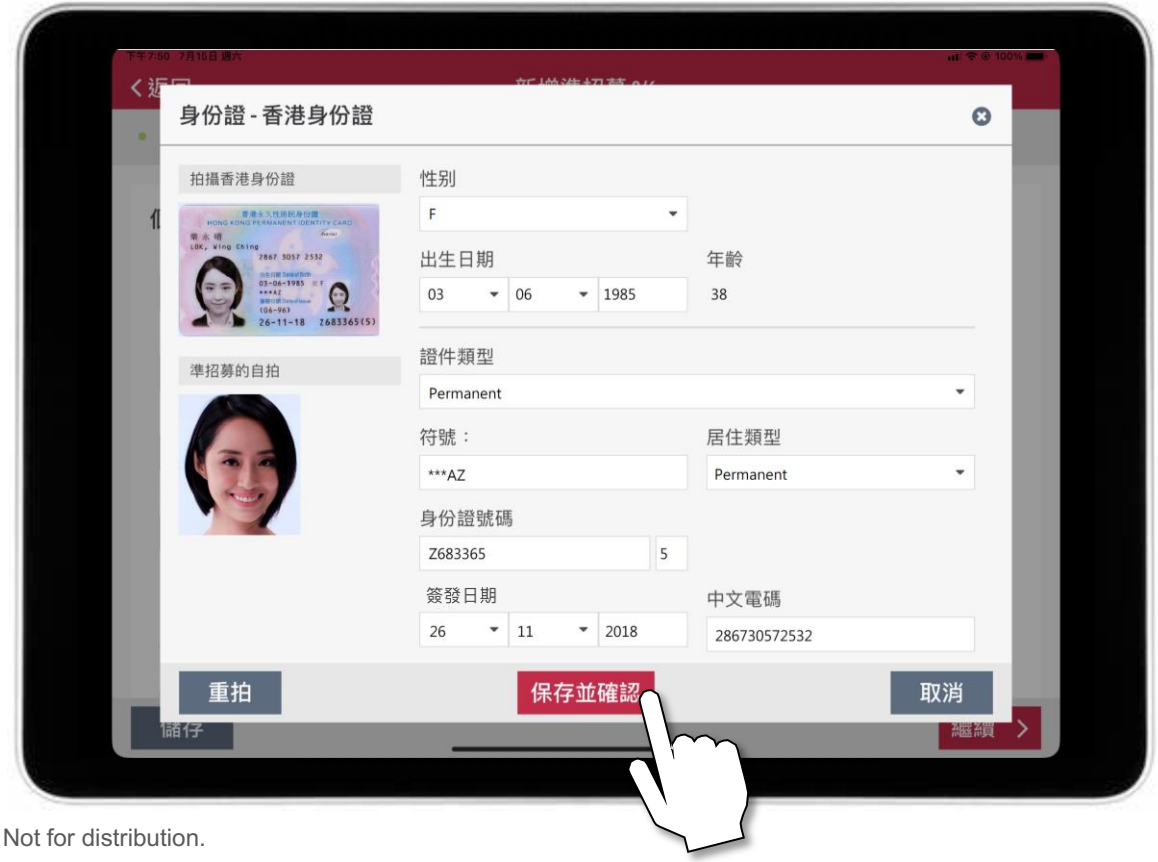
步驟 5：顯示電子驗證成功結果

待加載完成，系統會顯示電子驗證成功結果，**如沒有任何錯誤訊息顯示，電子驗證結果為成功。保存並確認**電子驗證結果及確認內部同事為準招募開立保險中介一站個人帳戶電。

1. 檢查已擷取的個人資料：
- 性別
- 出生日期
- 年齡
- 證件類型
- 符號
- 居住類型
- 身份證號碼
- 簽發日期
- 中文電碼
- 手機號碼
- 電郵

2. 按下**保存並確認**按鈕



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步驟 6：顯示提示訊息

成功保存並確認電子驗證結果後，系統會顯示提示窗口。

1. 按提示窗口的確認按鈕。
2. 按繼續按鈕以完成其他步驟。

注意：

所確認的資料會用作開立保險中介一站通個人帳戶。

如在開立保險中介一站通個人帳戶的事宜有任何查詢，請電郵至 aiahkar-ia@aia.com 。



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如何得知電子驗證已成功完成？

在**個人資料**內顯示的電子驗證之狀態。

1. 狀態為「**綠色剔**」符號。



在**準招募數據庫**的電子驗證欄位。

1. 狀態為**成功**。
2. 立即開始電子驗證按鈕會被禁用。



在**電子合約**的電子牌驗證欄位。

1. 狀態為**成功**。
2. **立即開始電子驗證**按鈕會被移除。



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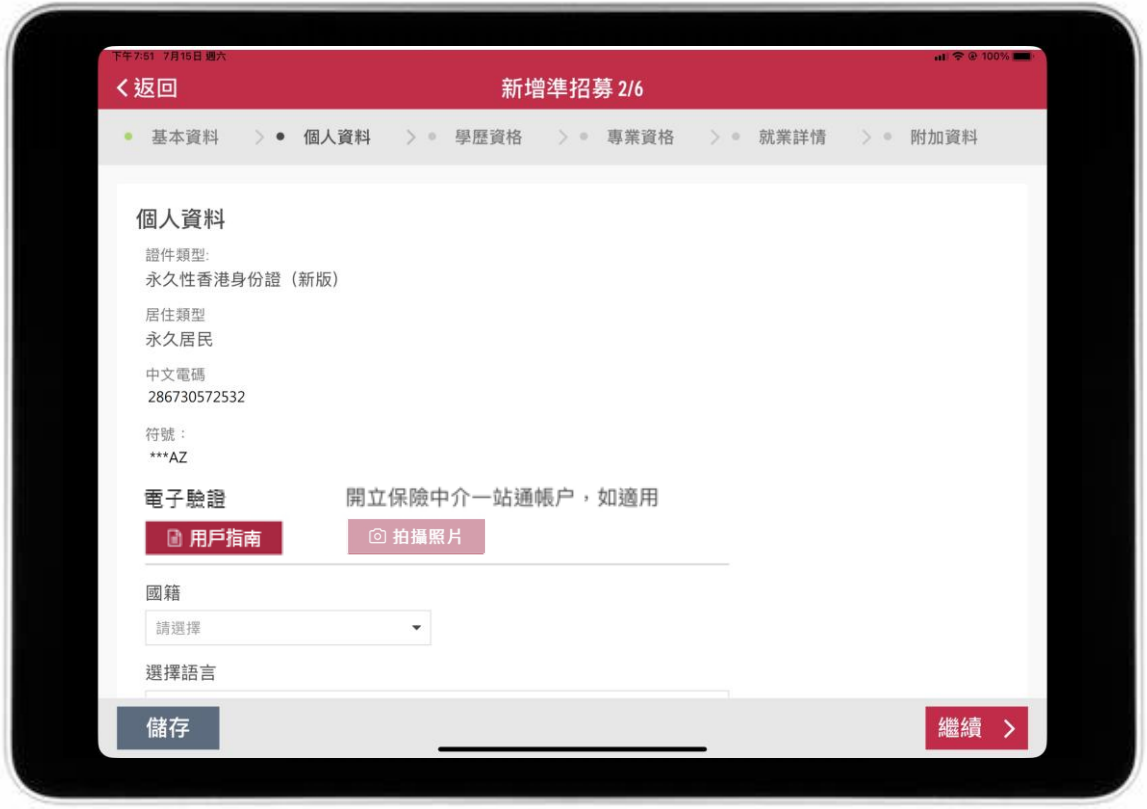
成功完成電子驗證後 – 驗證資料會被填寫在友招募的準招募資料內

成功完成及確認電子驗證後：

1. 電子驗證結果會自動填充到相關欄位。
2. 相關欄位會被鎖定和不能夠修改。



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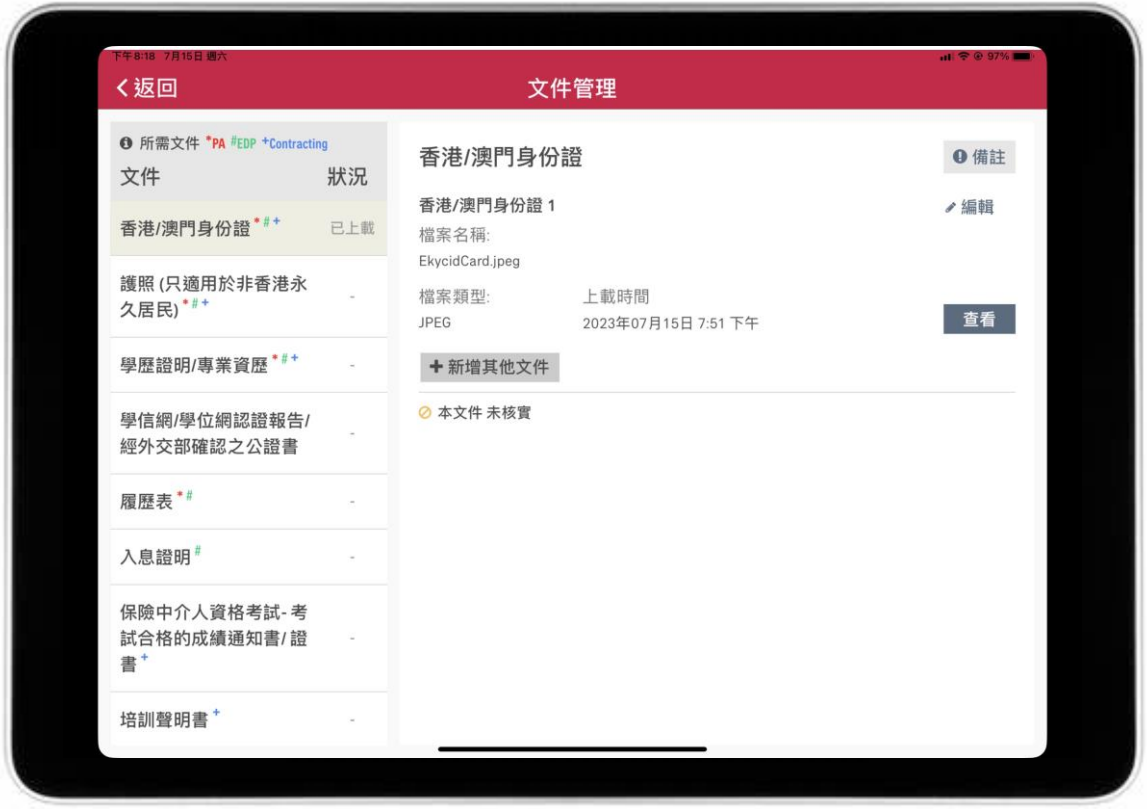
成功完成電子驗證後 – 已拍攝的香港身份證會被上載至友招募文件管理庫

成功完成及確認電子驗證後：

已拍攝的香港身份證會被自動上載到文件管理。



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重新加載電子驗證結果

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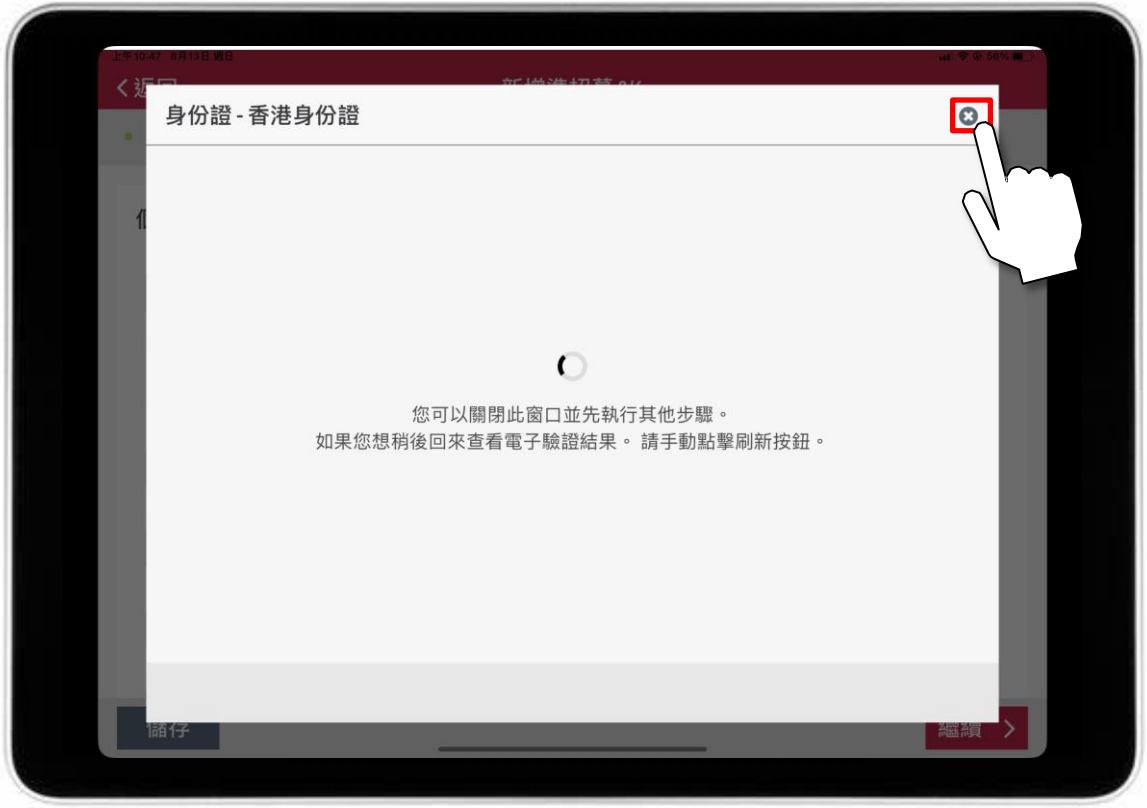
稍後再查看電子驗證結果

當等候時間超過15秒，加載頁面會有以下提示。 1. 您可以關閉當前窗口和進行

其他申請步驟，或者繼續等待電子驗證結果。



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重新加載電子驗證結果

如果您關閉當前窗口，您可以按下**重新載入**按鈕。

1. 當電子驗證結果已完成加載，會顯示電子驗證結果窗口。



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重新加載電子驗證結果

如果您關閉當前窗口，您可以按下**重新載入**按鈕。

1. 當電子驗證結果未完成加載，系統顯示加載頁面。
2. 您可以關閉當前窗口和進行其他申請步驟，或者繼續等待電子驗證結果。



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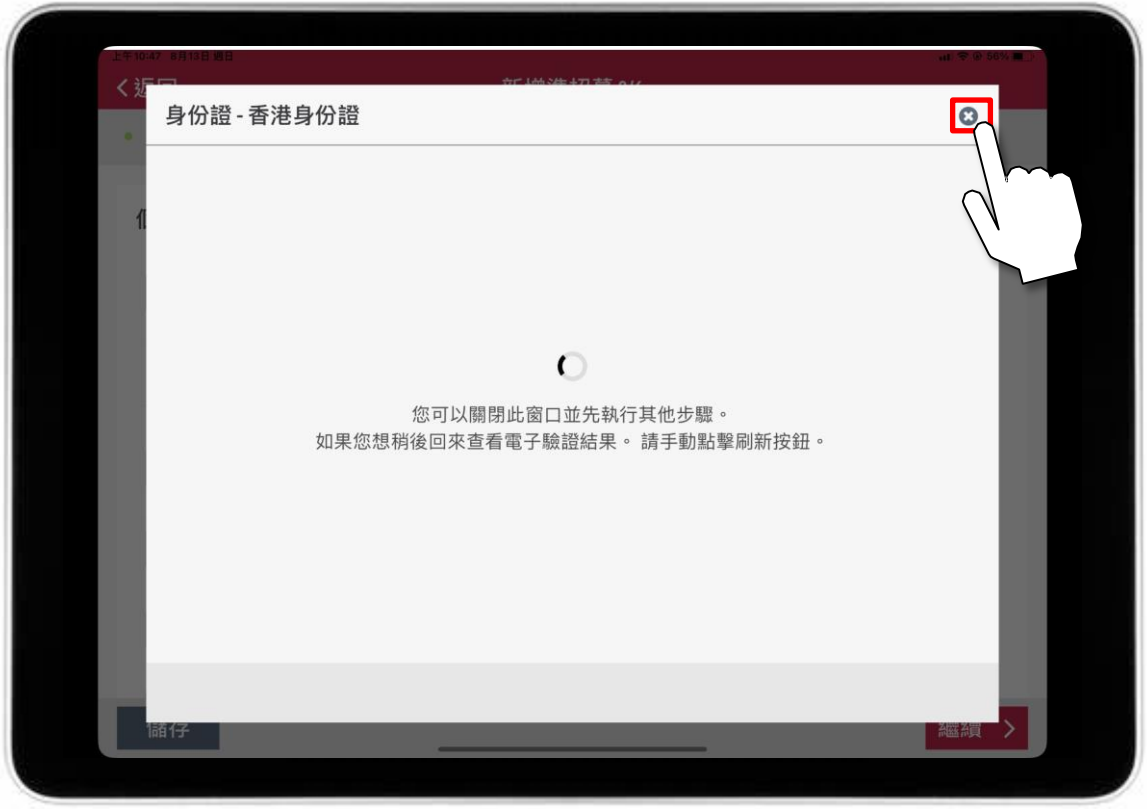
稍後再查看電子驗證結果

如果您關閉當前窗口，您可以按下**重新載入**按鈕。

1. 當電子驗證結果未完成加載，系統顯示加載頁面。
2. 您可以關閉當前窗口和進行其他申請步驟，或者繼續等待電子驗證結果。



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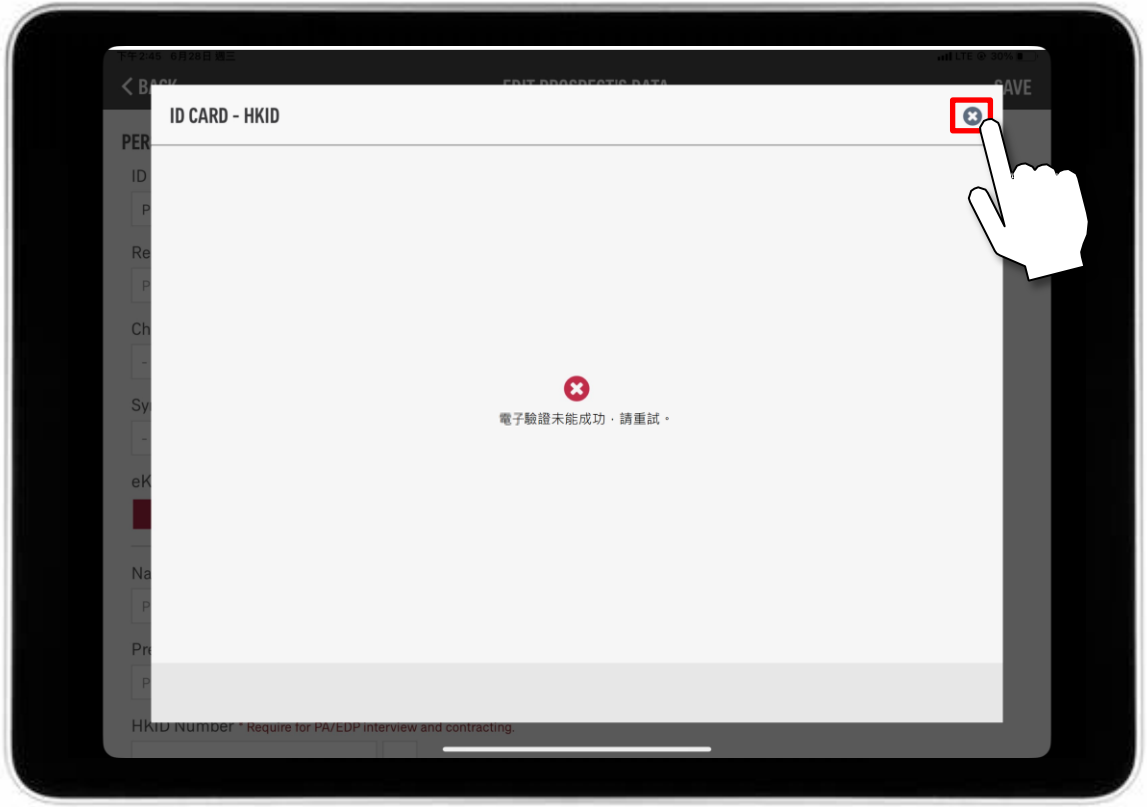
電子驗證未能成功

如果您關閉當前窗口，您可以按下**重新載入**按鈕。

1. 當電子驗證未能成功加載 ，系統顯示未能成功加載頁面。
2. 您可以關閉當前窗口和重試電子驗證。



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如果電子驗證失敗，我可以怎樣重試電子驗證？

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重試電子驗證

前設 完成拍攝準招募的香港身份證及 自拍。

當驗證結果為失敗， 可重試電子驗證。 1. 按下**重拍**按鈕，您和準招募
可以重新進行電子驗證。



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連續四次電子驗證失敗，我可以豁免電子驗證嗎？

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連續四次電子驗證失敗後，你可以同意豁免電子驗證

當您和準招募連續四次電子驗證失敗， 你可同意豁免電子驗證。

1. 按下**同意並豁免電子驗證**按鈕。內部人員會聯絡準招募以進行身份驗證。
2. 電子驗證結果會自動填充到相關欄位。
3. 相關欄位不會被鎖定和能夠修改。



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顯示提示訊息

同意並豁免電子驗證以完成電子驗證。

1. 按提示窗口的確認按鈕。
2. 按繼續按鈕以完成其他步驟。

注意：

所確認的資料會用作開立保險中介一站通個人帳戶。

如在開立保險中介一站通個人帳戶的事宜有任何查詢，請電郵至 aiahkar-ia@aia.com 。



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電子驗證狀態轉為豁免

在**準招募數據庫**的電子驗證欄位。 狀

1. 態會轉為**豁免**。 **立即開始電子驗**
2. **證**按鈕會被禁用。



在**電子合約**的電子驗證欄位。

1. 狀態會轉為**豁免**。
2. **立即開始電子驗證**按鈕會被移除。



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[AIA – INTERNAL]

如果我在遞交CR申請時仍未有機會與準招募會面，我可以豁免電子驗證嗎？

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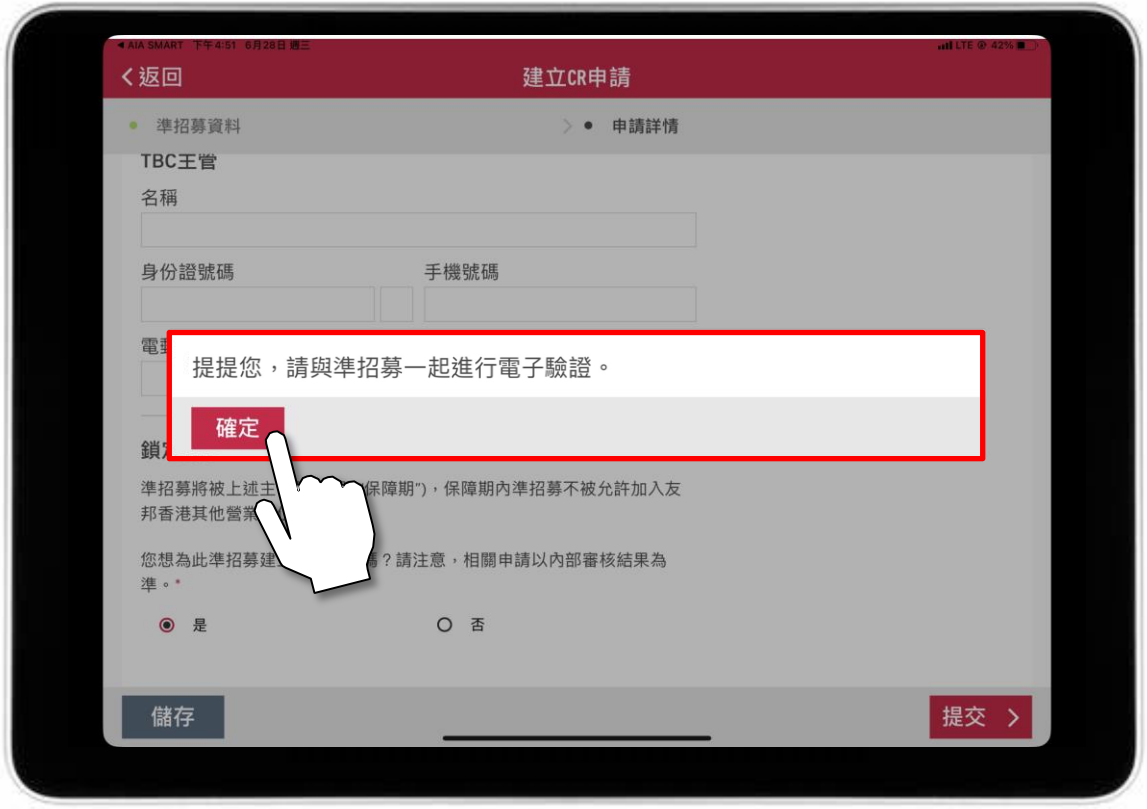
在建立CR申請時，系統會有相關執行電子驗證的提示訊息

當您建立CR申請，如未完成電子驗證，系統會顯示電子化驗證提示訊息。



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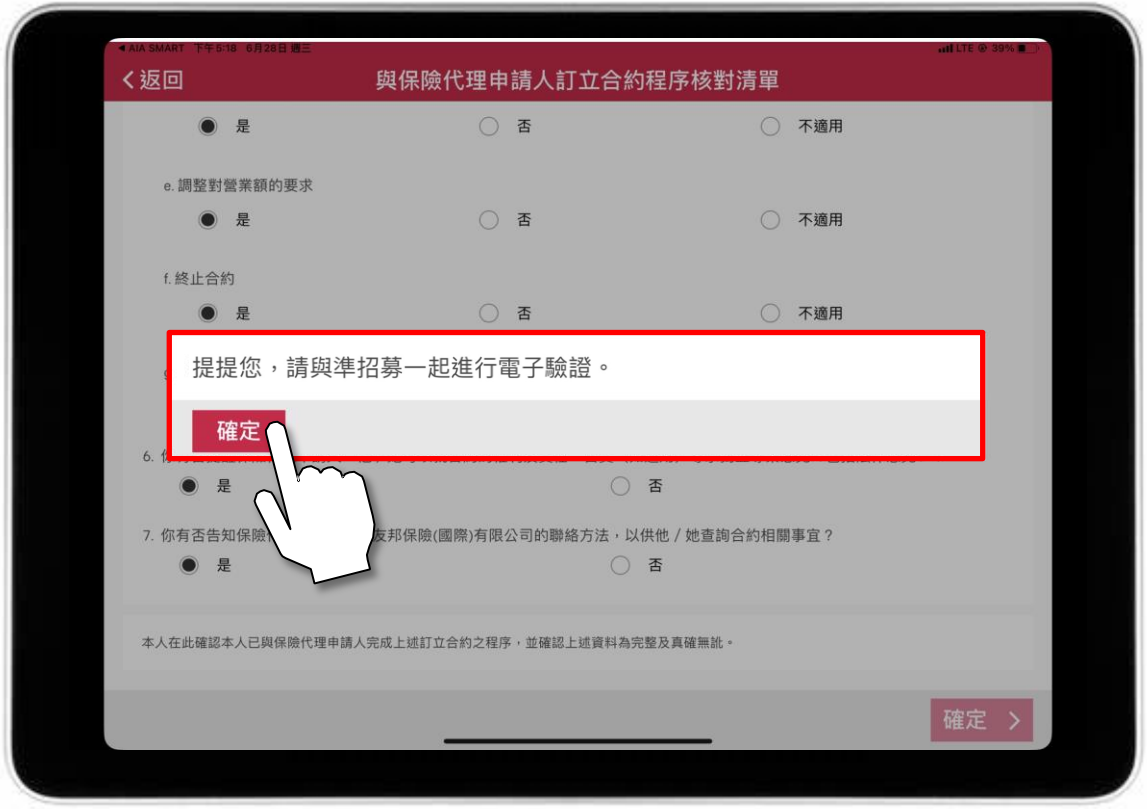
在建立CR Checklist時，系統會有相關執行電子驗證的提示訊息

當您建立與保險代理申請人定立合約程序核對清單時，如未完成電子驗證，系統會顯示電子化驗證提示訊息。



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如你簽署CR申請時仍未有機會與準招募會面，你可以決定以紙本方式申請開啟「保險中介一站通」個人帳戶

如果您未能簽署CR申請前與準招募與準招募見面時：

1. 當您按下繼續按鈕以簽署CR申請表格， 系統會顯示豁免窗口。
2. 按下**「否」**按鈕以豁免電子驗證。
3. 豁免電子驗證，內部人員會聯絡準招募以進行身份驗證。
4. 準招募需要填寫並遞交保險中介一站通申請表格及身份證交回AIA。



注意：

準招募須將已填妥之保監局「保險中介一站通」個人帳戶申請表格連同準招募之香港身份証副本遞交至公司。 否則，此財務策劃顧問申請將無法得到進一步處理。

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電子驗證狀態將轉為豁免後，你需要以紙本方式申請開啟「保險中介一站通」個人帳戶

在**準招募數據庫**的電子驗證欄位。

1. 狀態會轉為**豁免**。
2. **立即開始電子驗證**按鈕會被禁用。



在**電子合約**的電子驗證欄位。

1. 狀態會轉為**豁免**。
2. **立即開始電子驗證**按鈕會被移除。



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我如何於電子驗證過程中更改香港身份證類型？

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轉換成舊版香港身份證

您可以轉換香港身份證類型由新版換成舊版。 1. 轉換成**舊版香港身份證**。



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轉換成新版香港身份證

您可以轉換香港身份證類型由舊版換成新版 。 1. 轉換成**新版香港身份證**。



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執行電子驗證時中斷流程

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執行電子驗證時中斷流程

執行電子驗證時中斷流程。

1. 按下**自行填寫資料**或者**取消**按鈕以返回原來頁面。



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執行電子驗證時中斷流程

在電子驗證結果窗口內取消電子驗證。 1. 按下 **X** 或**取消**按鈕以返回原

來頁面。



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[AIA – INTERNAL]

電子驗證狀態轉為未完成

在**準招募數據庫**的電子驗證欄位。

1. 狀態會轉為**未完成**。



在**電子合約**的電子驗證欄位。

1. 狀態會從**未開始**轉為**未完成**。



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電子驗證功能導覽手冊

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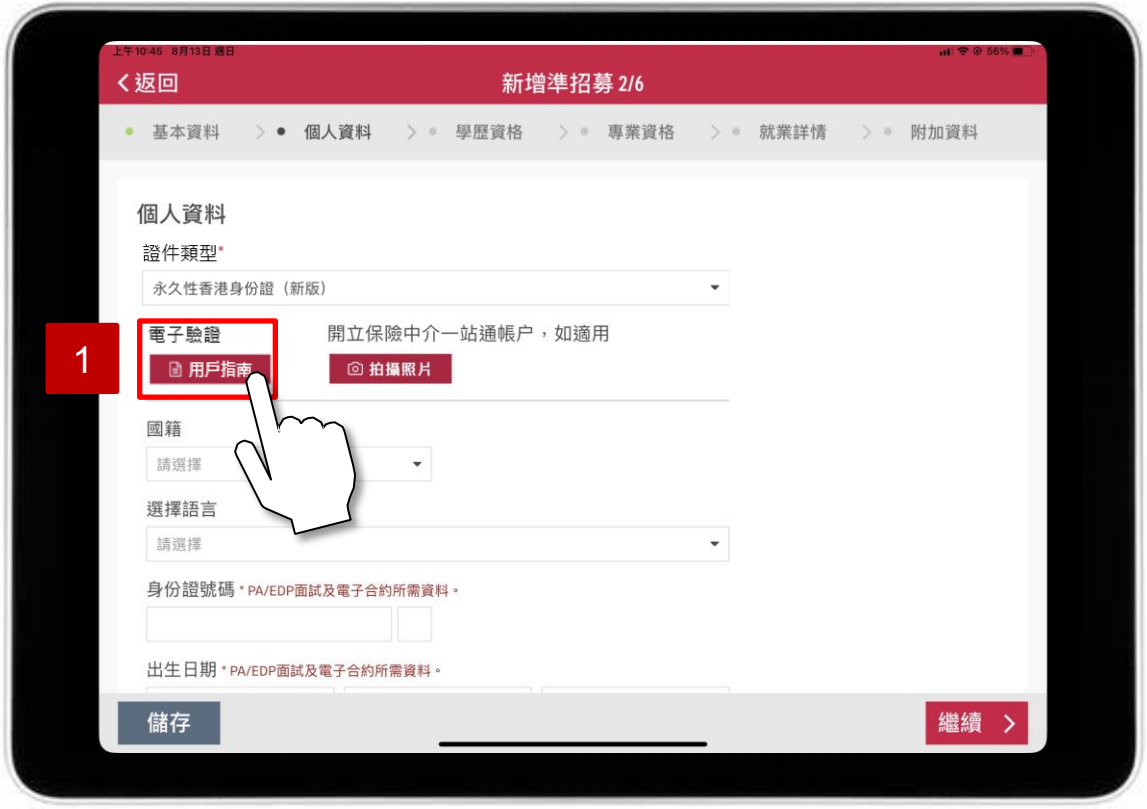
快速獲取導覽手冊

如果有任何疑問， 您和準招募可於進行電子驗證之前閱讀用戶指南。

1. 按下用戶指南按鈕。
2. 系統顯示用戶指南。



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技術支援及保險中介一站通個人帳戶相關問題

- 如您遇上技術上問題，您可以將遇到的技術難題發送電子郵件至 hk.helpdesk@aia.com。
- 如您有任何疑問關於開立保險中介一站通個人帳戶，請發送電子郵件至 aiahkar-ia@aia.com。

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謝謝

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使用说明目录

1. 使用电子验证作开立保险中介一站个人帐户的目的及好处
2. 使用电子验证
3. 开始电子验证
4. 重新加载电子验证结果
5. 如果电子验证失败，我可以怎样重试电子验证？
6. 连续四次电子验证失败，我可以豁免电子验证吗？
7. 如果我在递交CR申请时仍未有机会准招募会面时，我可以豁免电子验证吗？
8. 我如何于电子验证过程中更改香港身份证类型？
9. 执行电子验证时中断流程
10. 电子验证功能导览手册

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返回语言目录

使用电子验证作开立保险中介一站通个人帐户的目的及好处

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使用电子验证作开立保险一站通个人帐户，助您省却纸本繁复步骤！



招募者

- 需要重新提交纸本申请开立保险在一站个人帐户中
- 增加填写准招募个人身份资料的准确度
- 加快招聘流程



准招募

- 无需填写保监局保险中介一站通个人账户申请表格
- 省却视像身份认证步骤
- 省却上全香港身份证副本的步骤



电子验证提示：

- 仅适用于香港及没有有效的保险一站通个人账户的准招募
- 只适用于友招募（iPad版）
- 完成电子验证后，会启动「开立保险在一站个人账户」流程
- 可以在招募者签署CR申请表格进行电子验证

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使用电子验证

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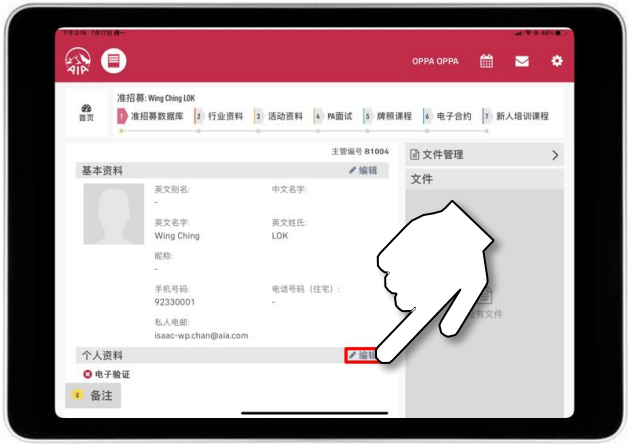
开始电子验证的入口点

1



于新增准招募2/6的拍摄照片按钮

2



点击继续按钮进入编辑准招募资料
以按下拍摄照片按钮

3



点击立即开始电子验证按钮
进入编辑准招募资料 以按
下拍摄照片按钮

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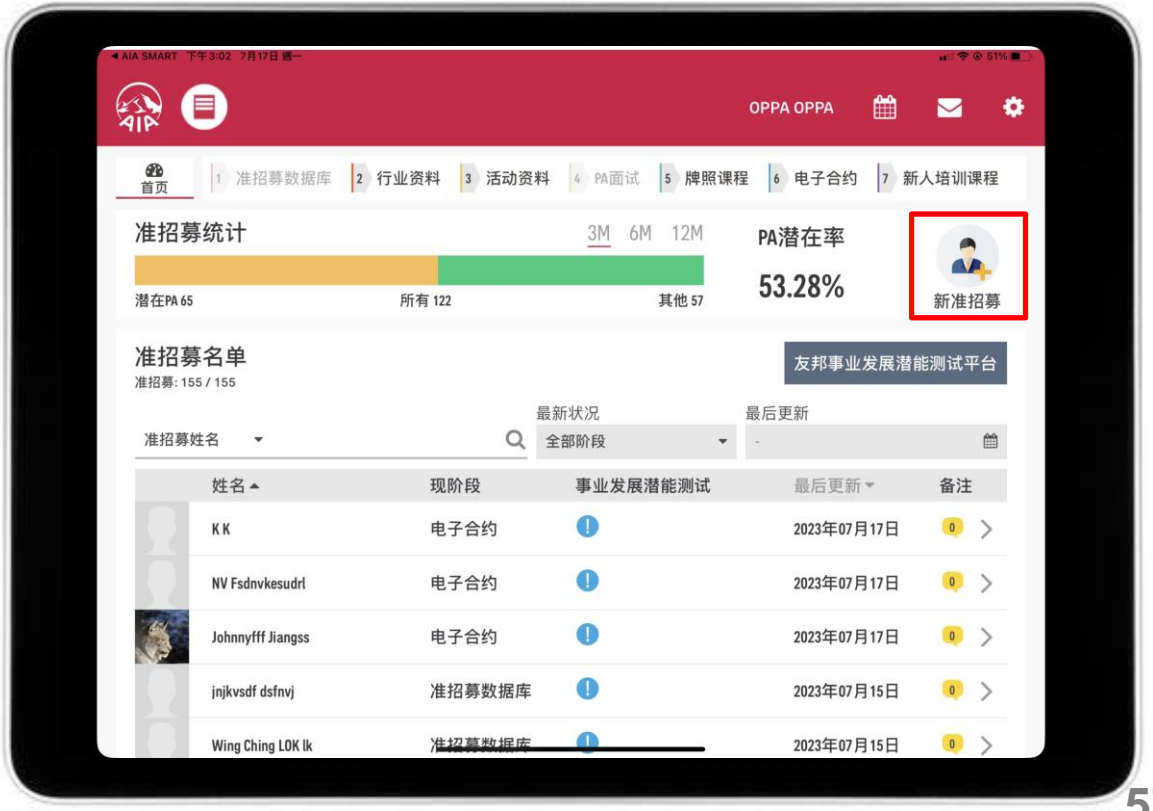
方法一：新增准招募

建立准招募档案

1. 透过**智友易(AIA SMART)** 登入**友招募 (iPad 版)**。
2. 按下**新准招募**按钮。
3. 输以下资料后按下**储存**按钮。

- **英文名字**
- **英文姓氏**
- **手机号码**
- **电邮地址**



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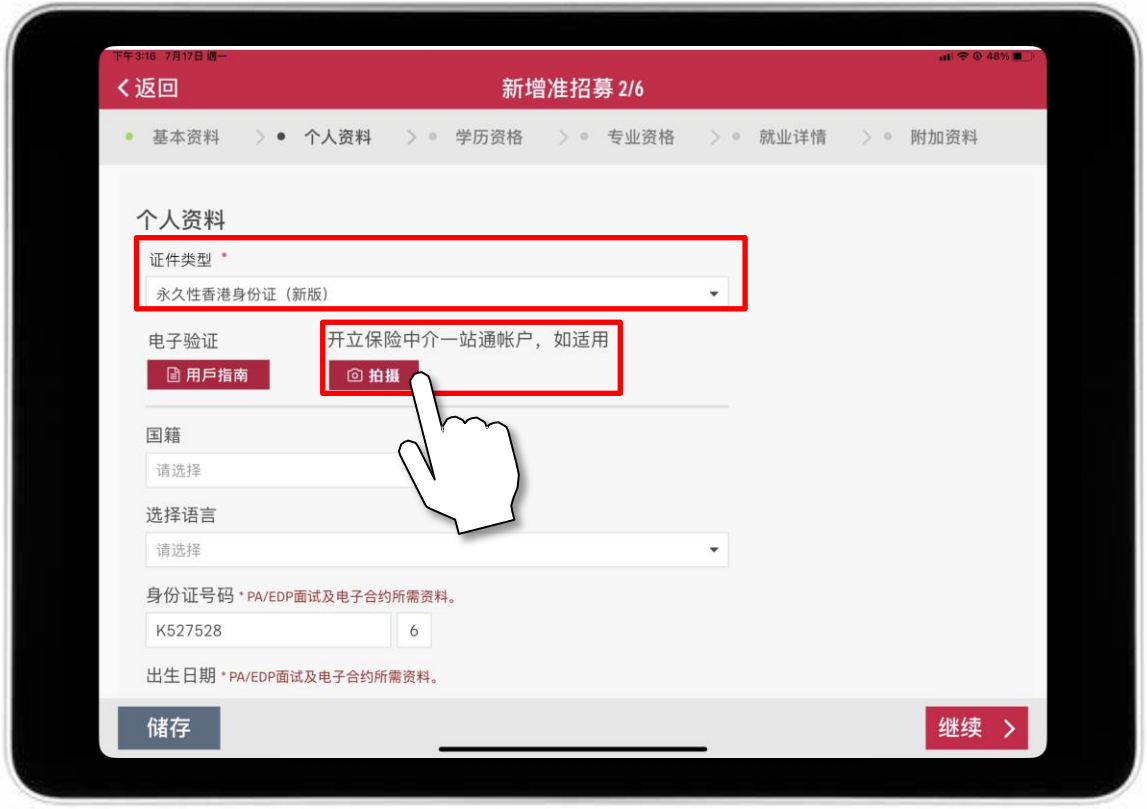
步骤 1：选项选择证件类型

拍摄照片按钮会被禁用当未选择证件类型。

1. 在以下选项选择证件类型：
- **永久性香港身份证（新版）**
- **永久性香港身份证（旧版）**
- **非永久性香港身份证（新版）**
- **非永久性香港身份证（旧版）**

2. 电子验证**拍摄照片**按钮会被启用。



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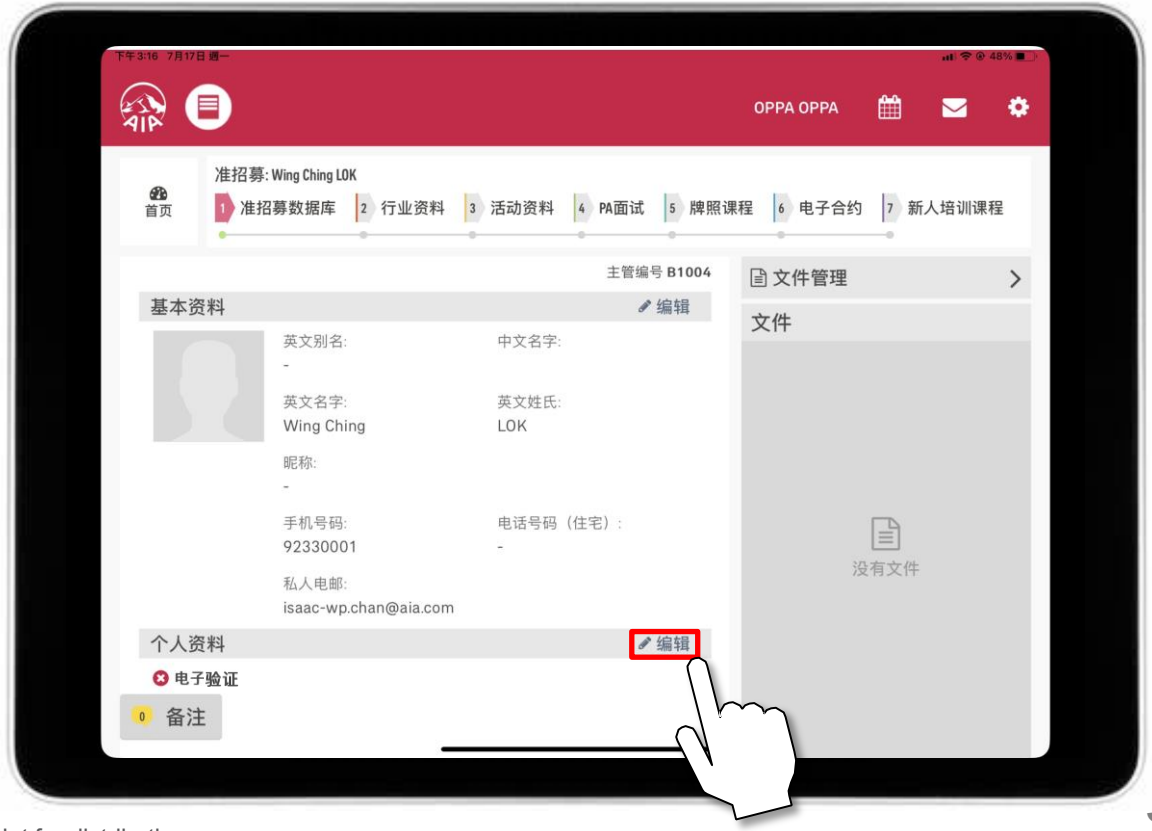
方法二：在准招募数据库的个人资料内

您可以在**个人资料**部份中进行电子化验证。 1. 在**准招募数据库**当中的**个人资料**部份中按下**编辑**按钮。



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步骤 1：选项选择证件类型

拍摄照片按钮会被禁用当未选择证件类型。

1. 在以下选项选择证件类型：

- **永久性香港身份证（新版）**
- **永久性香港身份证（旧版）**
- **非永久性香港身份证（新版）**
- **非永久性香港身份证（旧版）**

2. 电子验证**拍摄照片**按钮会被启用。



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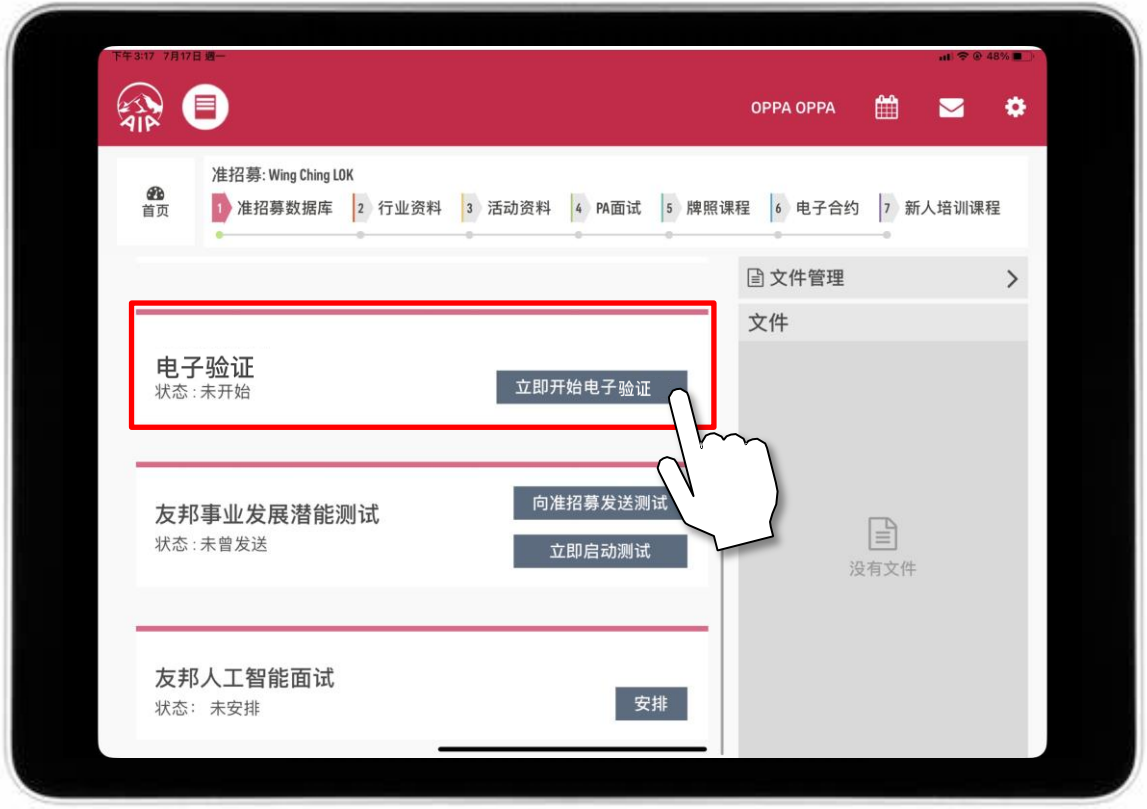
方法三：位于电子验证栏位的入口点

入口点 3 -准招募数据库的电子验证栏位

招募员可以在电子验证栏位中进行电子验证。

1. 在**准招募数据库**中按下**立即开始电子验证**按钮。
2. 系统会显示电子验证窗口，招募员可以和准招募一起进行电子验证。



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步骤 1：选项选择证件类型

入口点 3 -准招募数据库的电子验证栏位

拍摄照片按钮会被禁用当未选择证件类型。

1. 在以下选项选择证件类型：

- **永久性香港身份证（新版）**
- **永久性香港身份证（旧版）**
- **非永久性香港身份证（新版）**
- **非永久性香港身份证（旧版）**

2. 电子验证**拍摄照片**按钮会被启用。



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开始电子验证

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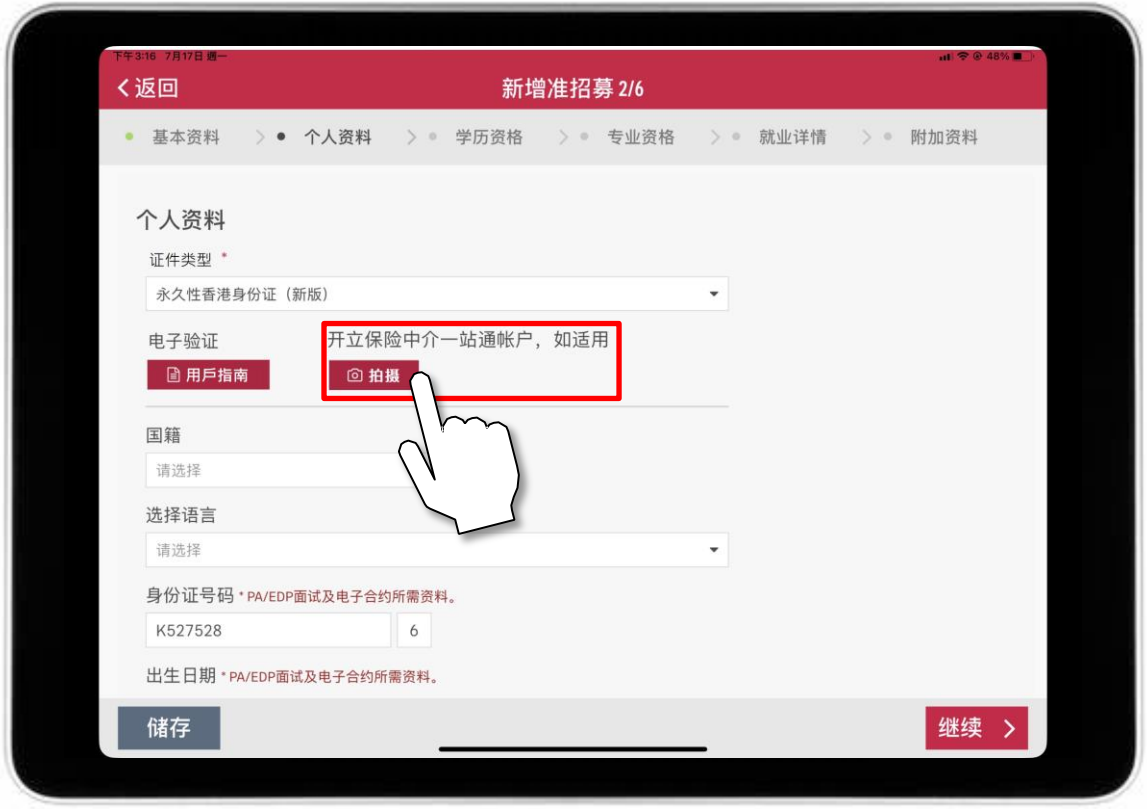
步骤 2：开始电子验证

您和准招募进行电子验证。

1. 按下**拍摄照片**按钮。
2. 显示电子验证窗口。



提示：

- **准招募档案上的准招募姓名和名字必须与准招募香港身份证上的姓名和名字一样。**

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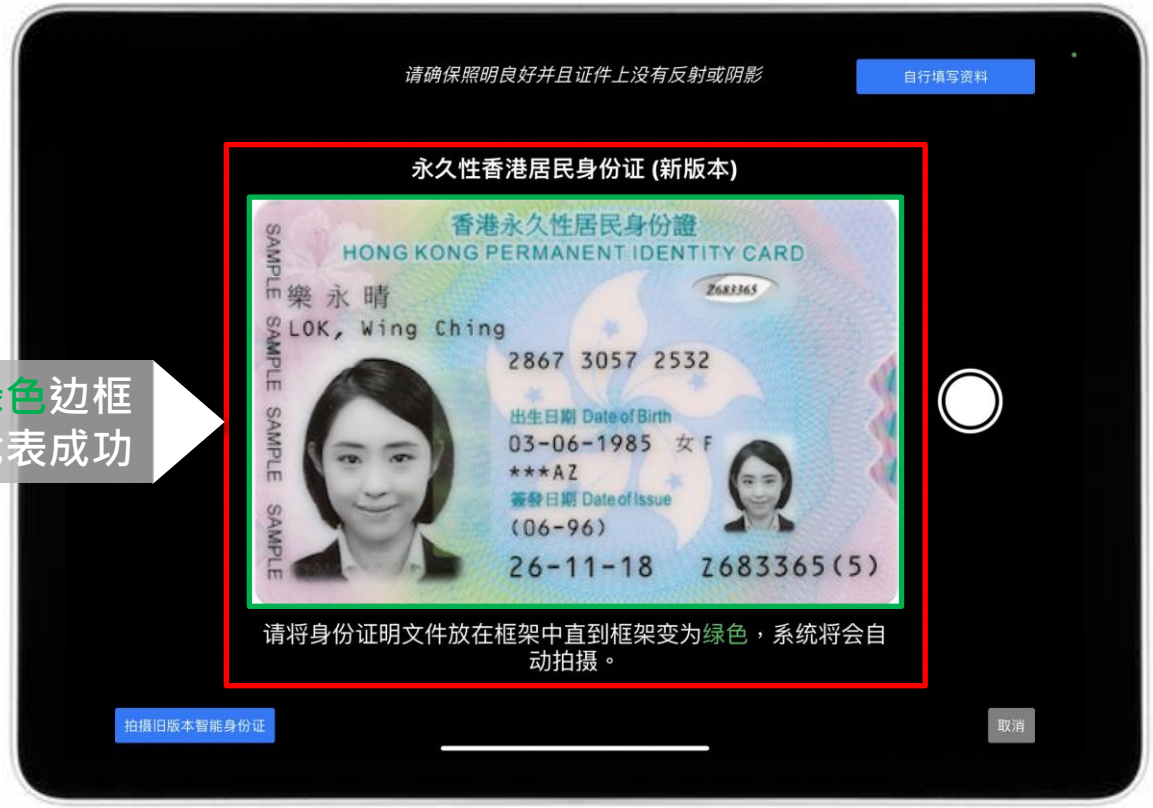
步骤 3：拍摄香港身份证的正面

1. 将香港身份证放在框架中如香港身份证成功贴合，撷取边框会由橙色变为绿色，**系统会自动拍摄香港身份证**。



绿色边框代表成功

提示：

- **请确保光线充足。**
- **身份证没有阴影或眩光。**
- **可将证件斜放45度角，以减少反光情形。**

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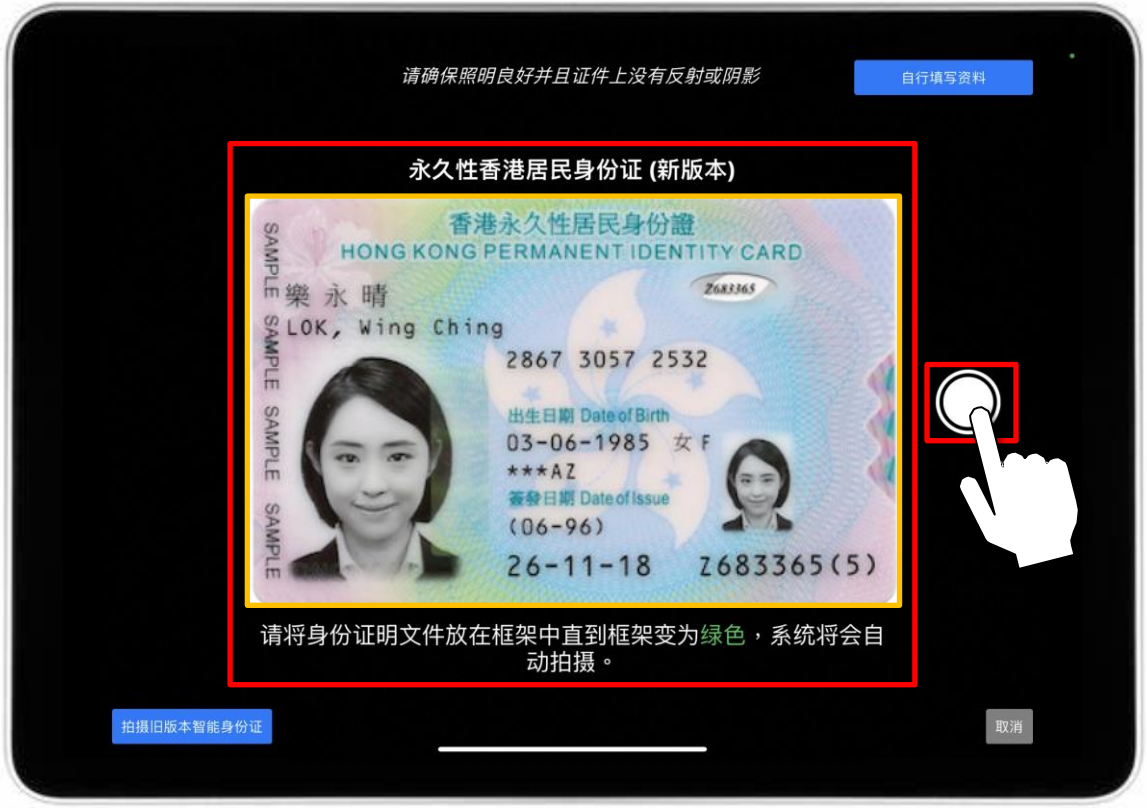
步骤 3：拍摄香港身份证的正面

手动拍摄香港身份证的正面。

1. 将香港身份证放在框架中。
2. 按下**快门按钮**以拍摄香港身份证。
3. 完成拍摄香港身份证的正面。
4. 系统显示拍摄准招募的窗口。



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步骤 4：拍摄个人照片

拍摄准招募照片。

1. 将准招募的样貌放在框架中。
2. 按下**快门按钮**以拍摄准招募的照片。

系统显示加载电子验证结果的页面。



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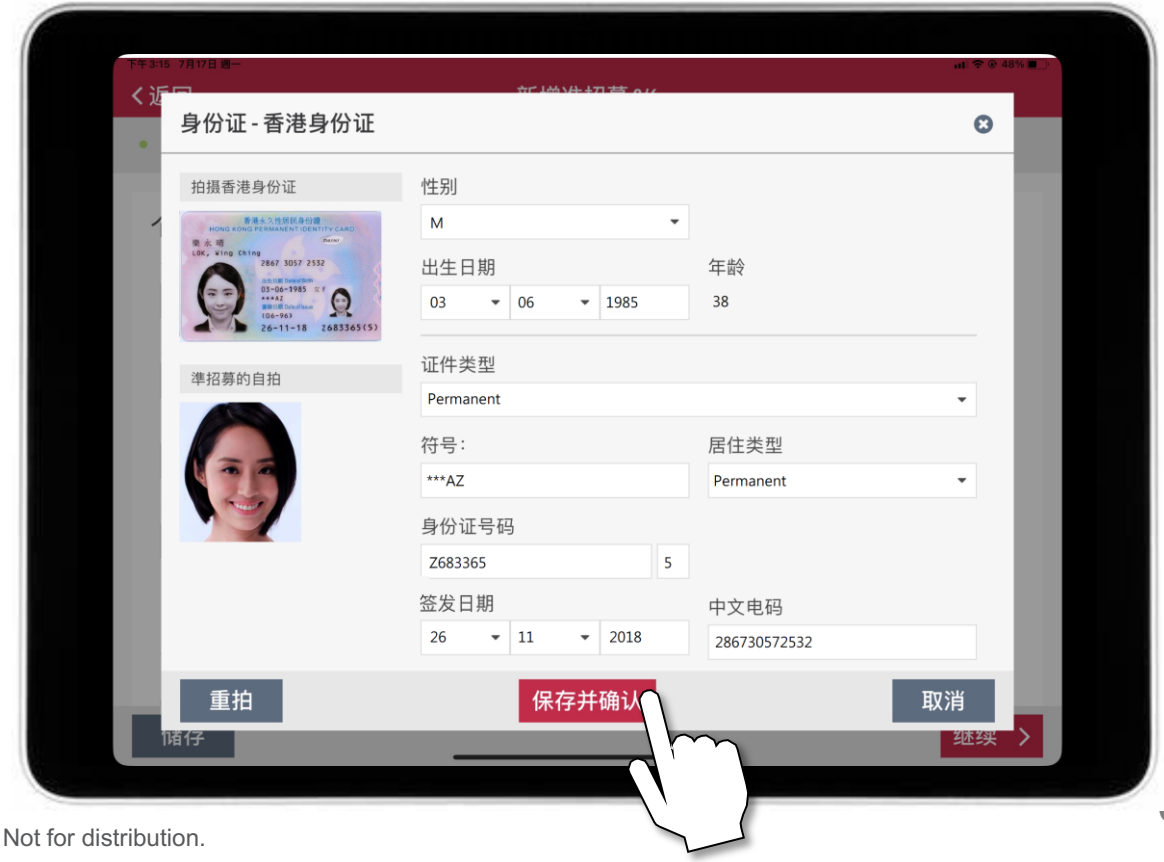
步骤 5：显示电子验证成功结果

待加载完成，系统会显示电子验证成功结果，**如没有任何错误讯息显示，电子验证结果为成功**。**保存并确认**电子验证结果及确认内部同事为准招募开立保险中介一站个人帐户电。

1. 检查已撷取的个人资料：
   - 性别
   - 出生日期
   - 年龄
   - 证件类型
   - 符号
   - 居住类型
   - 身份证号码
   - 签发日期
   - 中文电码
   - 手机号码
   - 电邮
2. 按下保存并确认按钮。



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步骤 6：显示提示讯息

成功**保存并确认电子验证**结果后，系统会显示提示窗口。

1. 按提示窗口的**确认**按钮。
2. 按**继续**按钮以完成其他步 骤。



注意：

所确认的资料会用作开立保险中介一站通个人帐户 。

如在开立保险中介一站通个人帐户的事宜有任何查询，请电邮至 aiahkar-ia@aia.com 。

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如何得知电子验证已成功完成？

在**个人资料**内显示的电子验证之状态。 1. 状态为「**绿色剔**」符号。



在**准招募数据库**的电子验证栏位。

1. 状态为**成功**。
2. 立即**开始电子验证**按钮会被禁用。



在**电子合约**的电子牌验证栏位。

1. 状态为**成功**。
2. **立即开始电子验证**按钮会被移除。



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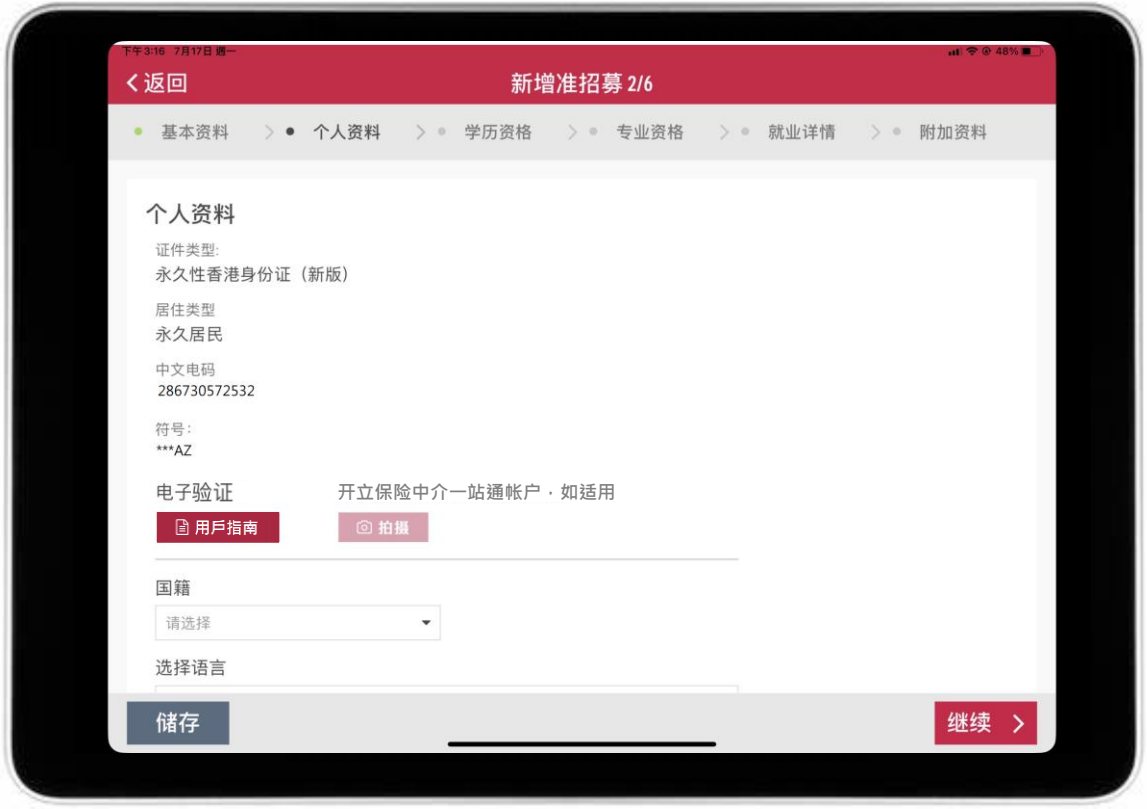
成功完成电子验证后 – 验证资料会被填写在友招募的准招募资料内

成功完成及确认电子验证后：

1. 电子验证结果会自动填充到相关栏位。
2. 相关栏位会被锁定和不能够修改。



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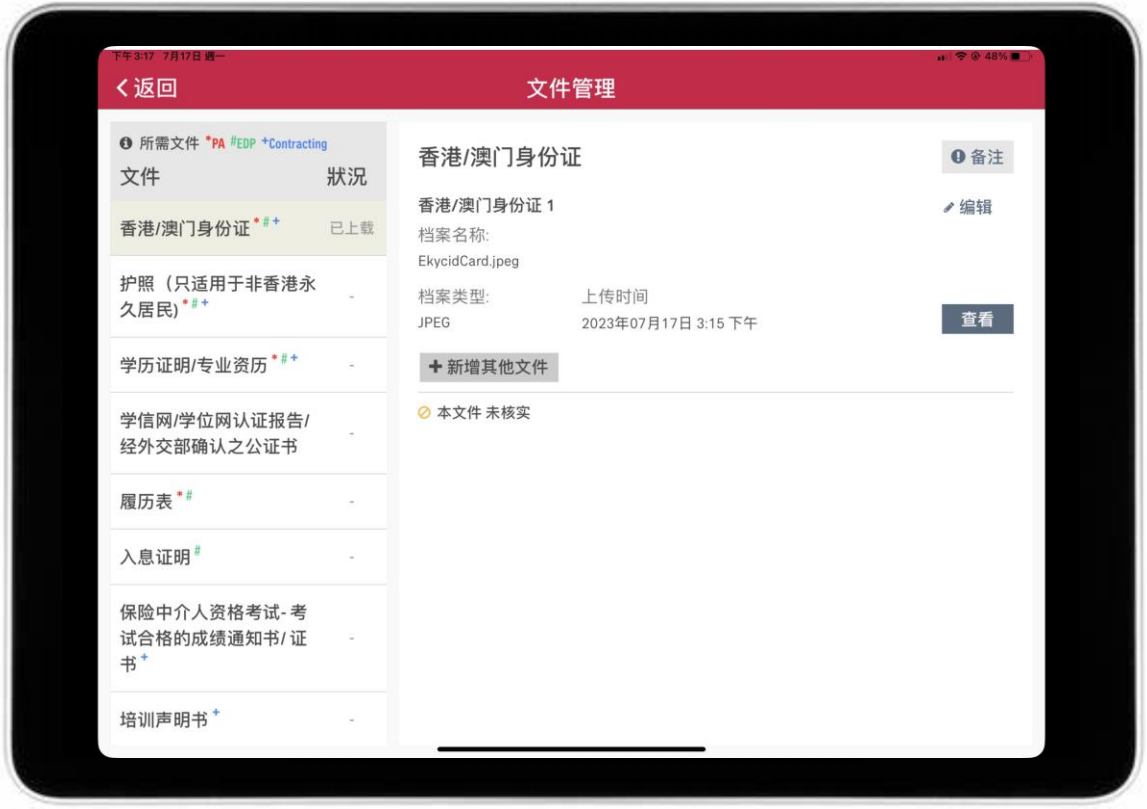
成功完成电子验证后 – 已拍摄的香港身份证会被上载至友招募文件管理库

成功完成及确认电子验证后：

已拍摄的香港身份证会被自动上载到文件管理。



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重新加载电子验证结果

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稍后再查看电子验证结果

当等候时间超过15秒，加载页面会有以下提示。 1. 您可以关闭当前窗口和进行

其他申请步骤，或者继续等待电子化验证结果。



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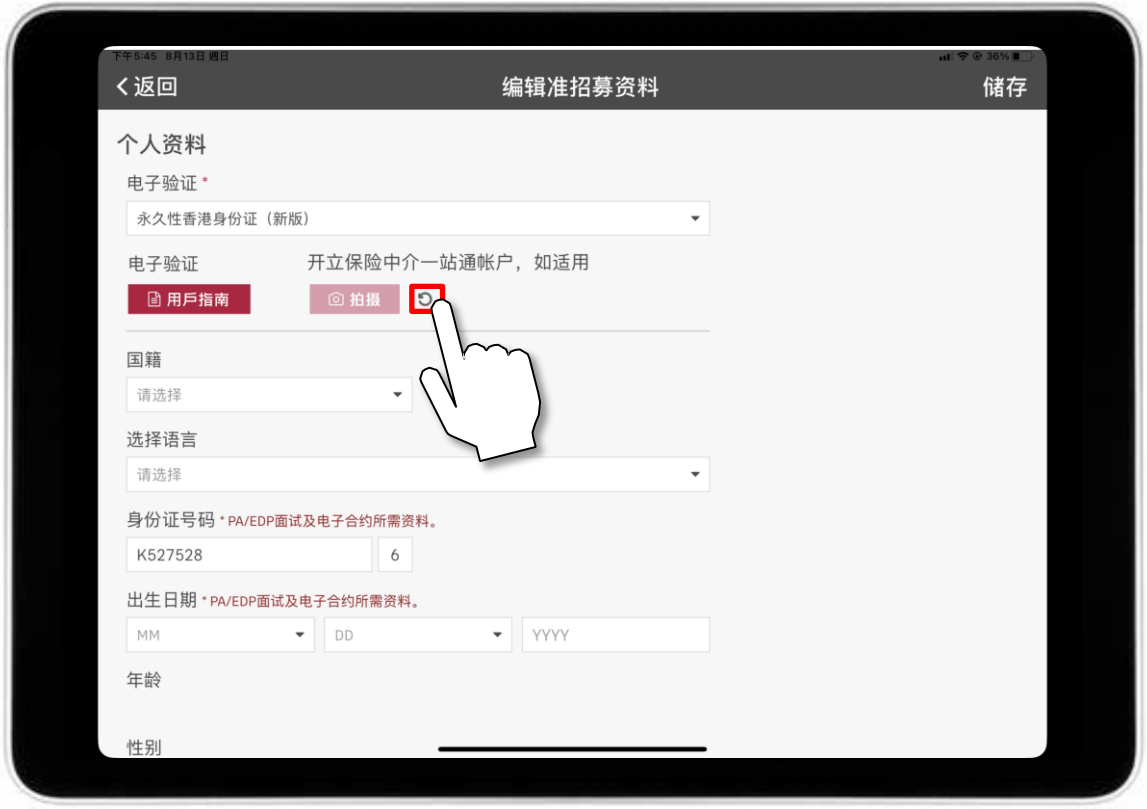
重新加载电子验证结果

如果您关闭当前窗口，招募员可以按下**重新载入**按钮。

1. 当电子验证结果已完成加载，会显示电子验证结果窗口。



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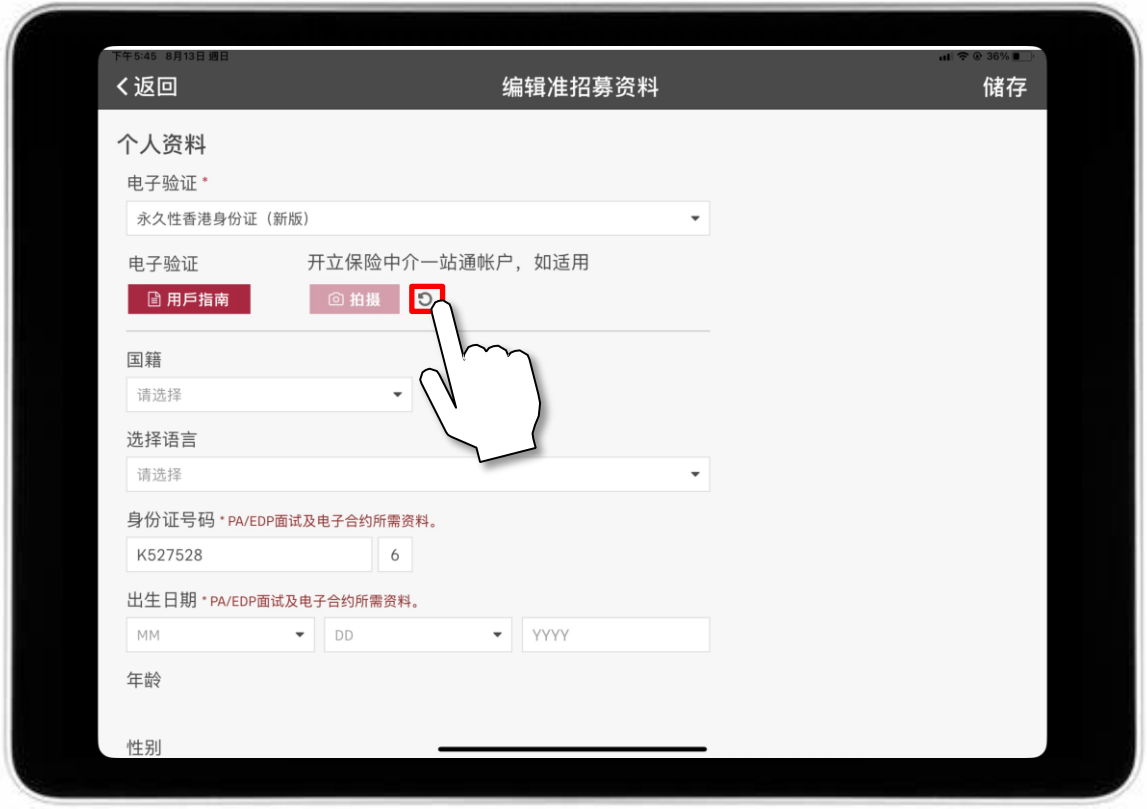
重新加载电子验证结果

如果您关闭当前窗口，您可以按下**重新载入**按钮。

1. 当电子验证结果未完成加载，系统显示加载页面。
2. 您可以关闭当前窗口和进行其他申请步骤，或者继续等待电子验证结果。



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稍后再查看电子验证结果

如果您关闭当前窗口，您可以按下**重新载入**按钮。

1. 当电子验证结果未完成加载，系统显示加载页面。
2. 您可以关闭当前窗口和进行其他申请步骤，或者继续等待电子验证结果。



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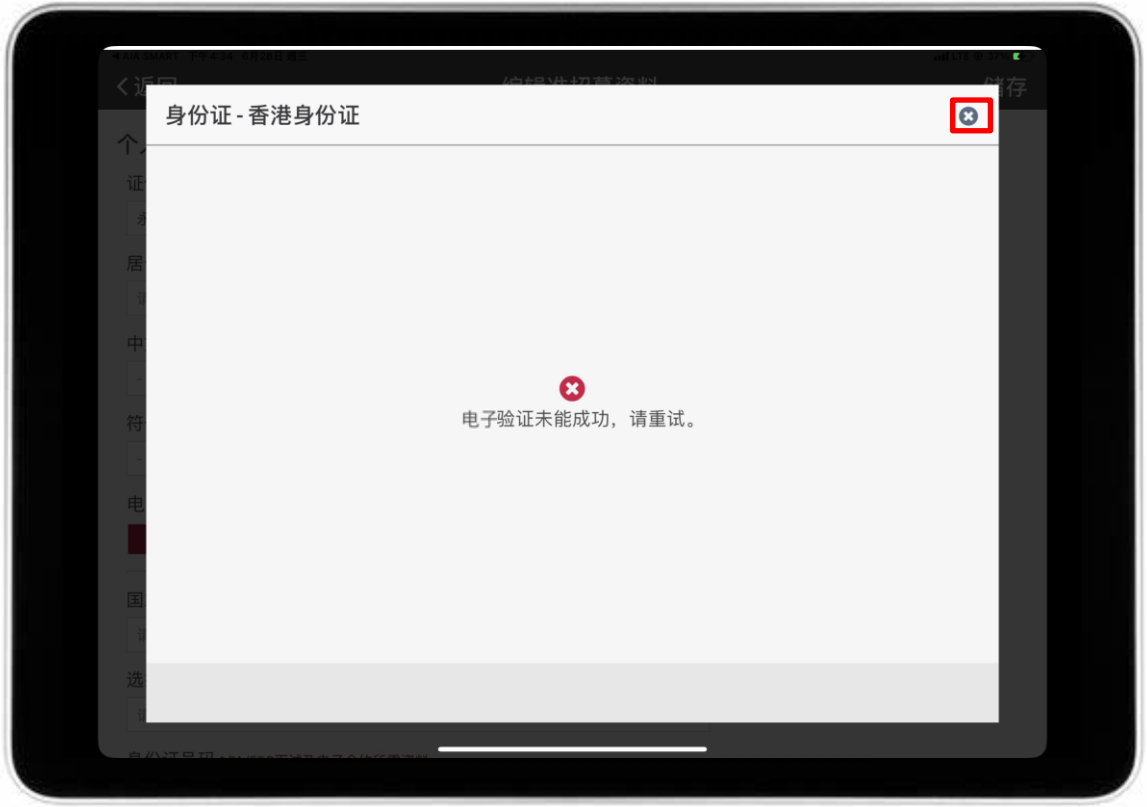
电子验证未能成功

如果您关闭当前窗口，您可以按下**重新载入**按钮。

1. 当电子验证未能成功加载 ，系统显示未能成功加载页面。
2. 您可以关闭当前窗口和重试电子验证。



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如果电子验证失败，我可以怎样重试电子验证？

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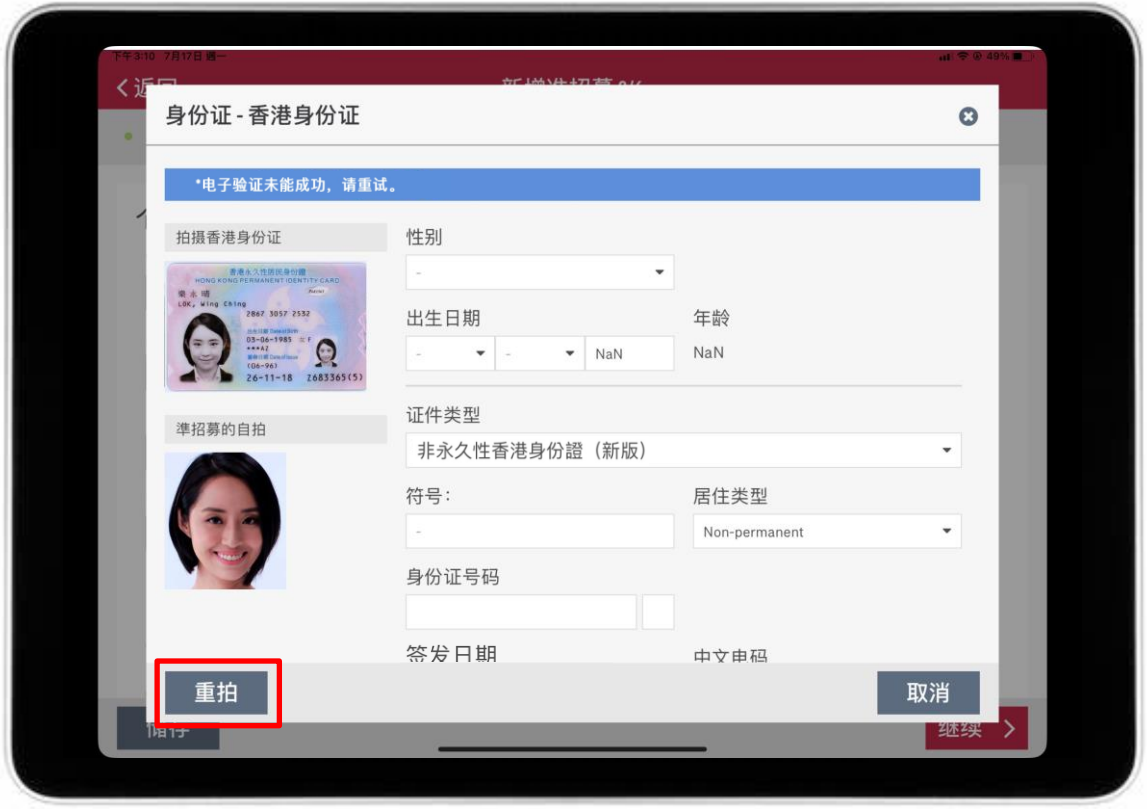
重试电子验证

前设 完成拍摄准招募的香港身份证及 自拍。

当验证结果为失败， 可重试电子验证。 1. 按下**重拍**按钮，您和准招募

可以重新进行电子验证。



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连续四次电子验证失败，我可以豁免电子验证吗？

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连续四次电子验证失败后，你可以同意豁免电子验证

当您和准招募连续四次电子验证失败， 你可同意豁免电子验证。

1. 按下**同意并豁免电子验证**按钮。内部人员会联络准招募以进行身份验证。
2. 电子验证结果会自动填充到相关栏位。
3. 相关栏位不会被锁定和能够修改。



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显示提示讯息

同意并豁免电子验证以完成电子 化验证。

1. 按提示窗口的**确认**按钮。
2. 按**继续**按钮以完成其他步骤 。



注意：

所确认的资料会用作开立保险中介一站通个人帐户 。

如在开立保险中介一站通个人帐户的事宜有任何查询，请电邮至 aiahkar-ia@aia.com 。

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电子验证状态将转为豁免后，你需要以纸本方式申请开启「保险中介一站通」个人帐户

在**准招募数据库**的电子验证栏位。

1. 状态会转为**豁免**。
2. **立即开始电子验证**按钮会被禁用。



在**电子合约**的电子验证栏位。

1. 状态会转为**豁免**。
2. **立即开始电子验证**按钮会被禁用。



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如果我在递交CR申请时仍未有机会准招募会面时，我可以豁免电子验证吗？

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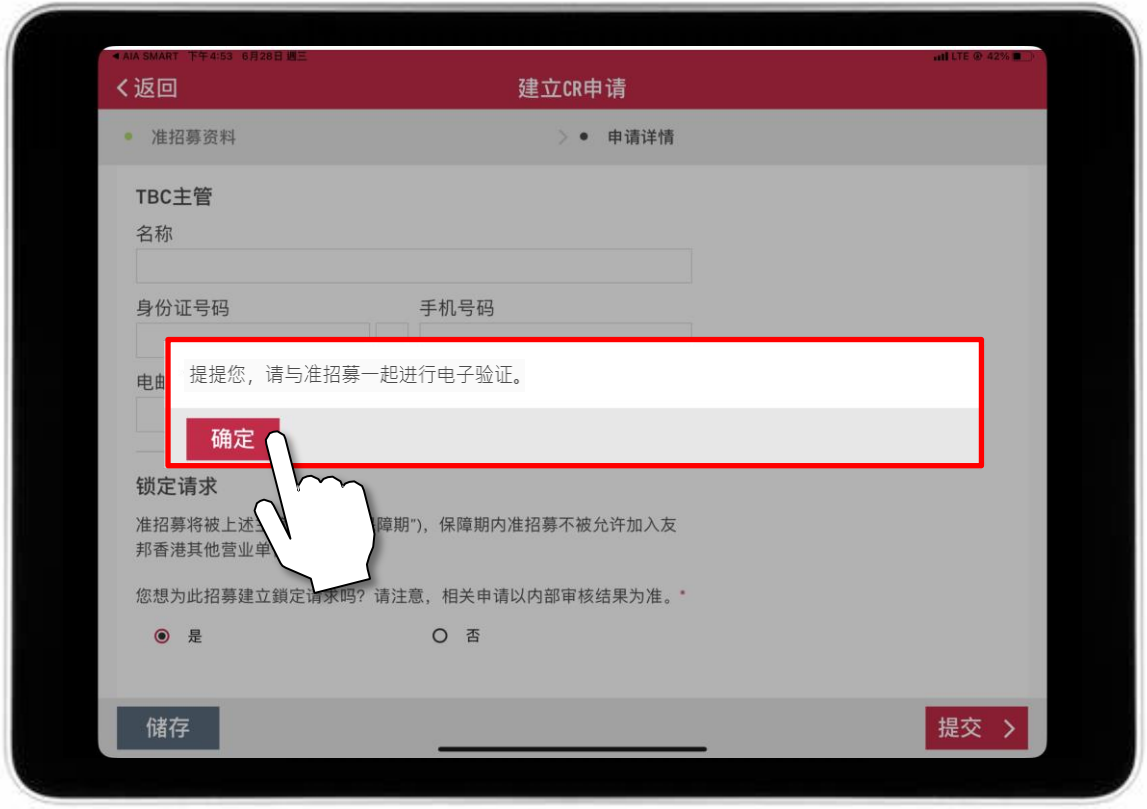
在建立CR申请时，系统会有相关执行电子验证的提示讯息

当您建立CR申请，如未完成电子验证，系统会显示电子化验证提示讯息。



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在建立CR Checklist时，系统会有相关执行电子验证的提示讯息

当您建立与保险代理申请人定立合约程序核对清单时，如未完成电子验证，系统会显示电子化验证提示讯息。



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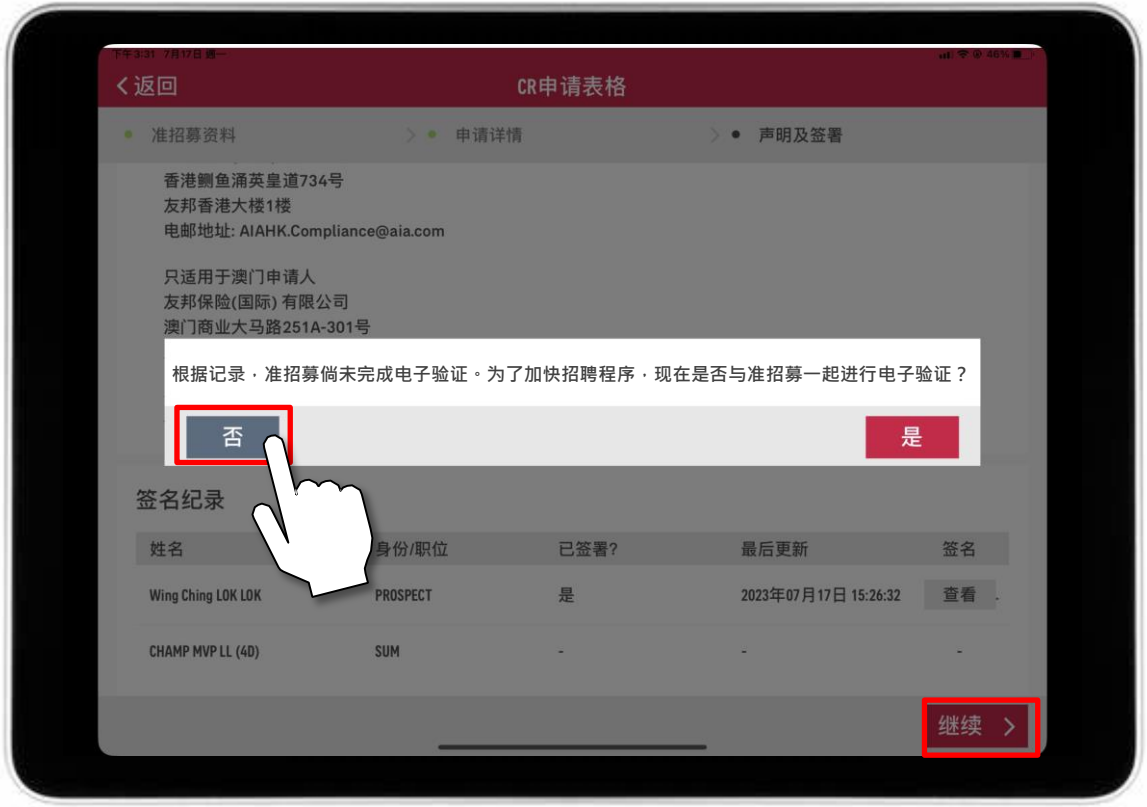
如你签署CR申请时仍未有机会与准招募会面，你可以决定以纸本方式申请开启「保险中介一站通」个人帐户

如果您未能签署CR申请前与准招募与准招募见面时：

1. 当您按下继续按钮以签署CR申请表格， 系统会显示豁免窗口。
2. 按下「否」按钮以豁免电子验证。豁免电子化验证，内部人员会联络准招募以进行身份验证。
3. 准招募需要填写并递交保险中介一站通申请表格交回AIA。



注意：

准招募须将已填妥之保监局「保险中介一站通」个人帐户申请表格连同准招募之香港身份证副本递交至公司。否则，此财务策划顾问申请将无法得到进一步处理 。

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电子验证状态转为豁免

在**准招募数据库**的电子验证栏位。

1. 状态会转为**豁免**。
2. 立即**开始电子验证**按钮会被禁用。



在**电子合约**的电子验证栏位。

1. 状态会转为**豁免**。
2. **立即开始电子验证**按钮会被移除。



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我如何于电子验证过程中更改香港身份证类型？

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转换成旧版香港身份证

您可以转换香港身份证类型由新版换成旧版。 1. 转换成**旧版香港身份证**。



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转换成新版香港身份证

您可以转换香港身份证类型由旧版换成新版 。 1. 转换成**新版香港身份证**。



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执行电子验证时中断流程

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执行电子验证时中断流程

执行电子验证时中断流程。

1. 按下**自行填写资料**或者**取消**按钮以返回原来页面。



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执行电子验证时中断流程

在电子验证结果窗口内取消电子验证。 1. 按下 **X** 或**取消**按钮以返回原

来页面。



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电子验证状态转为未完成

在**准招募数据库**的电子验证栏位。

1. 状态会转为**未完成**。



在**电子合约**的电子验证栏位。

1. 状态会转为**未完成**。



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电子验证功能导览手册

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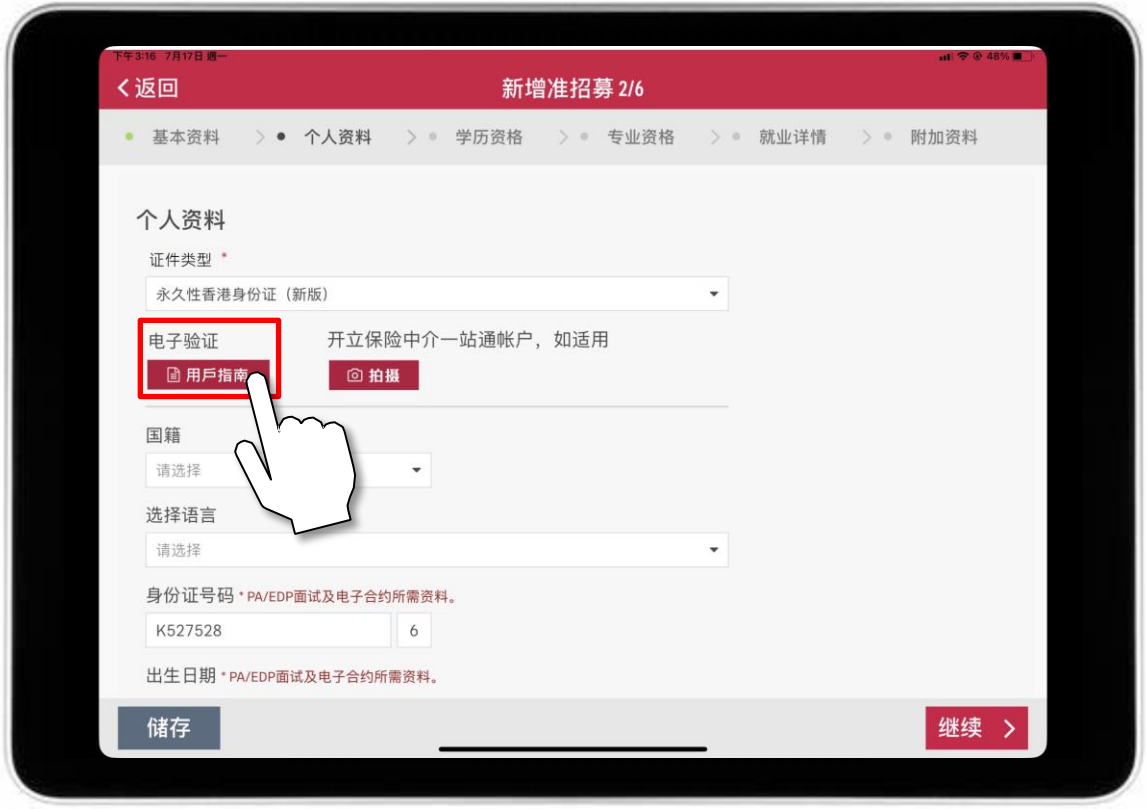
快速获取导览手册

如果有任何疑问，招募员和准招募可于进行电子验证之前阅读用户指南。

1. 按下用户指南按钮。
2. 系统显示用户指南。



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技术支援及保险中介一站通个人帐户相关问题

- 如您遇上技术上问题，您可以将遇到的技术难题发送电子邮件至 hk.helpdesk@aia.com。
- 如您有任何疑问关于开立保险中介一站通个人帐户，请发送电子邮件至 aiahkar-ia@aia.com。

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谢谢

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Purpose & Benefit of using Electronic Verification to Open IIC Account

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Use Electronic Verification to Open IIC Account saves you complicated steps!



Recruiter

- Increase the accuracy of filling in prospect's identity information
- Speed up the recruitment process



Prospect

- No need to fill in "Application for Insurance Authority (IA) Insurance Intermediaries Connect Account" application form
- Eliminate steps for video call verification
- Eliminate steps uploading copy of HKID

Tips of Electronic Verification:

- Only applicable to HK prospect without active IIC account
- Only applicable to iRecruit (iPad)
- Kick start IIC account opening process after completing electronic verification
- Allow performing electronic verification before recruiter signing CR application

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Use Electronic Verification

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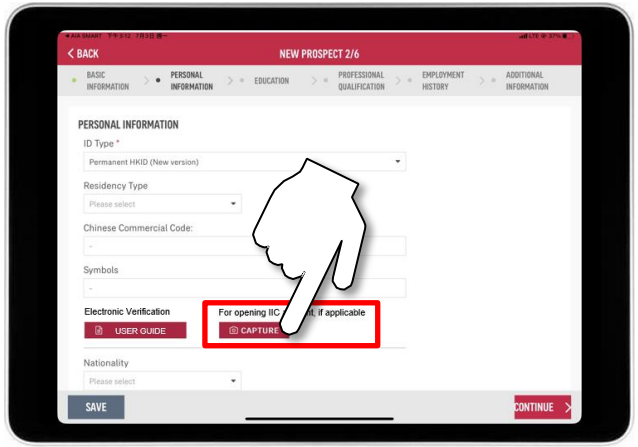
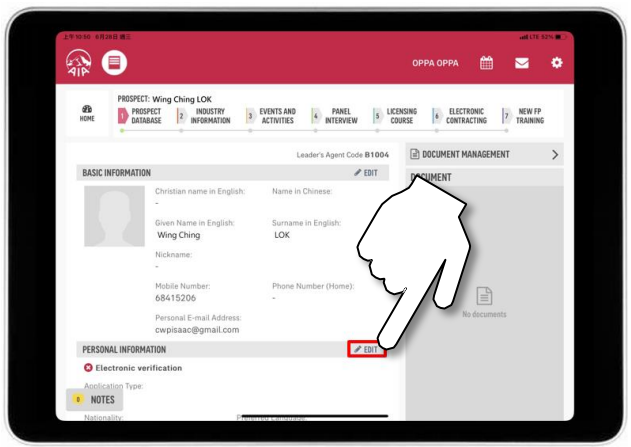
Entry Point to Start Electronic Verification

1



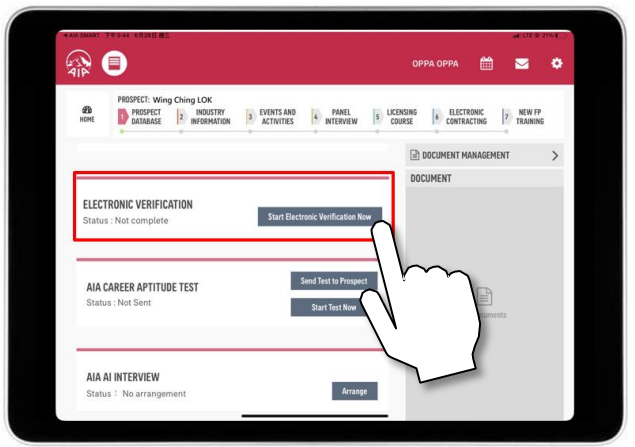
Press CAPTURE button in NEW PROSPECT 2/6

2



Access EDIT PROSPECT'S DATA page for pressing CAPTURE button

3



Access EDIT PROSPECT'S DATA page for pressing CAPTURE button

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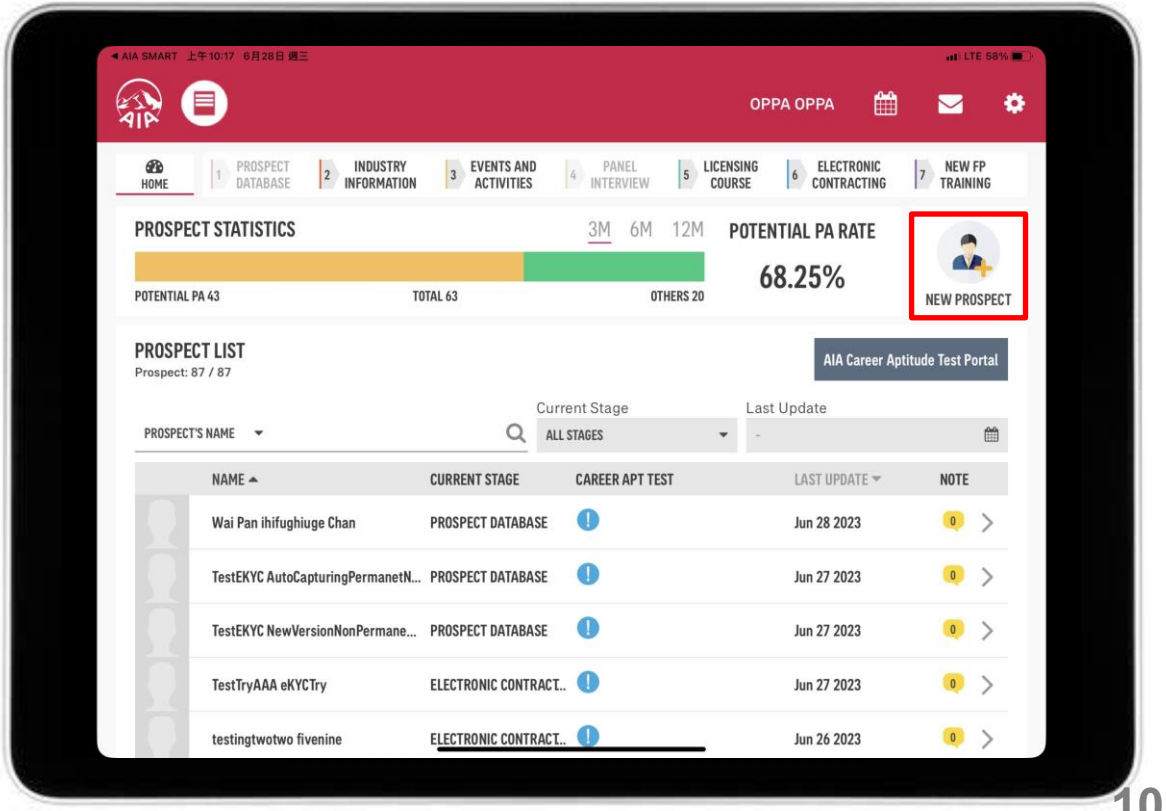
Method 1: Create New Prospect

Entry Point 1: New Prospect

Creates prospect's application profile

1. Login **iRecruit** via **AIA Smart**.
2. Press **NEW PROSPECT** button.
3. Input below information, then press **SAVE** button:

- **Given Name in English**
- **Surname in English**
- **Mobile Number**
- **E-mail Address**



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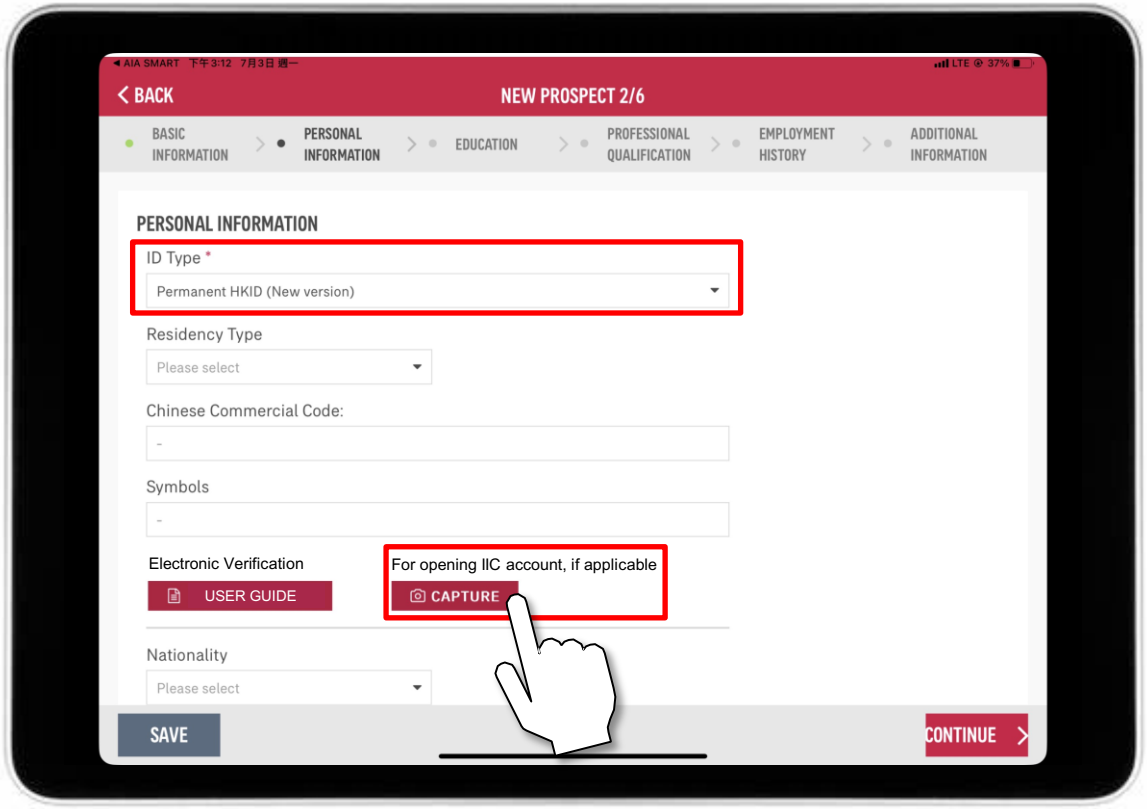
Step 1: Select ID Type

Entry Point 1: New Prospect

CAPTURE button will be disable when no **ID Type** is selected.

1. Select **ID Type** among:
   - **Permanent HKID (New Version)**
   - **Permanent HKID (Old Version)**
   - **Non-permanent HKID (New Version)**
   - **Non-permanent HKID (Old Version)**
2. Electronic verification **CAPTURE** button is activated.



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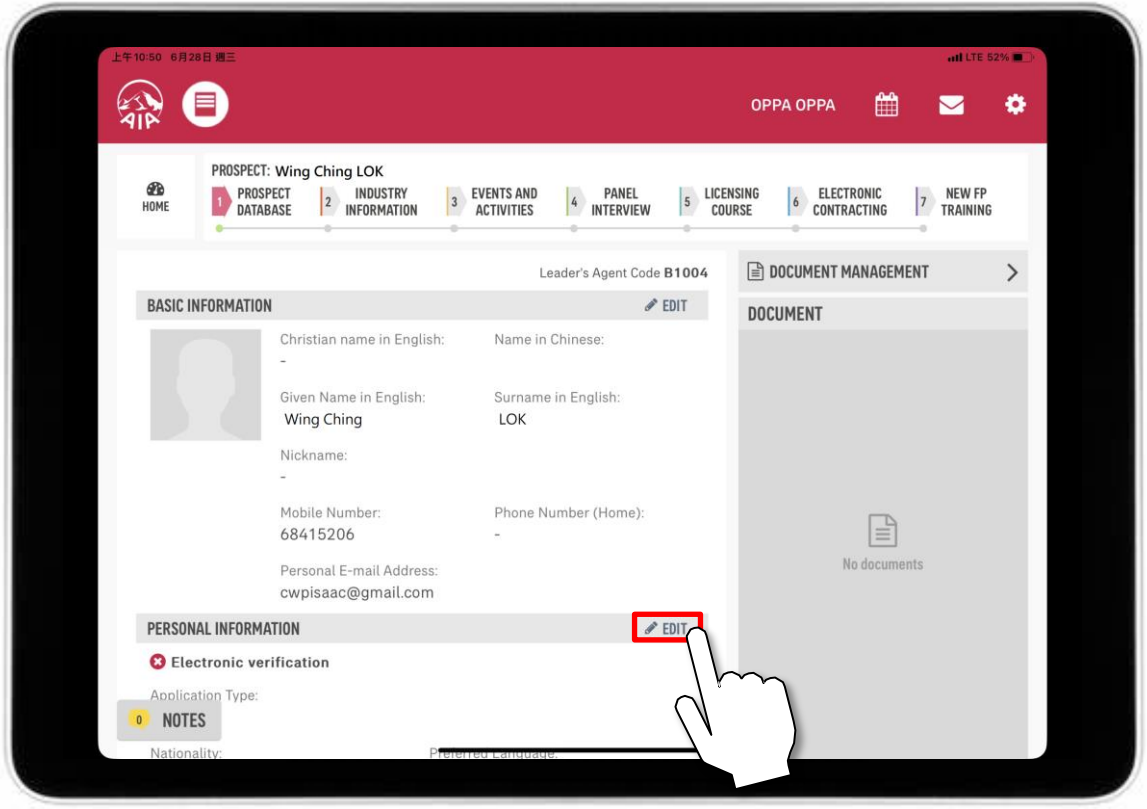
Method 2: Entry Point at Personal Information

Entry Point 2: Prospect Database

You can perform Electronic verification at **PERSONAL INFORMATION** section.

1. Press **EDIT** button of **PERSONAL INFORMATION** section in **step 1 – PROSPECT DATABASE**.



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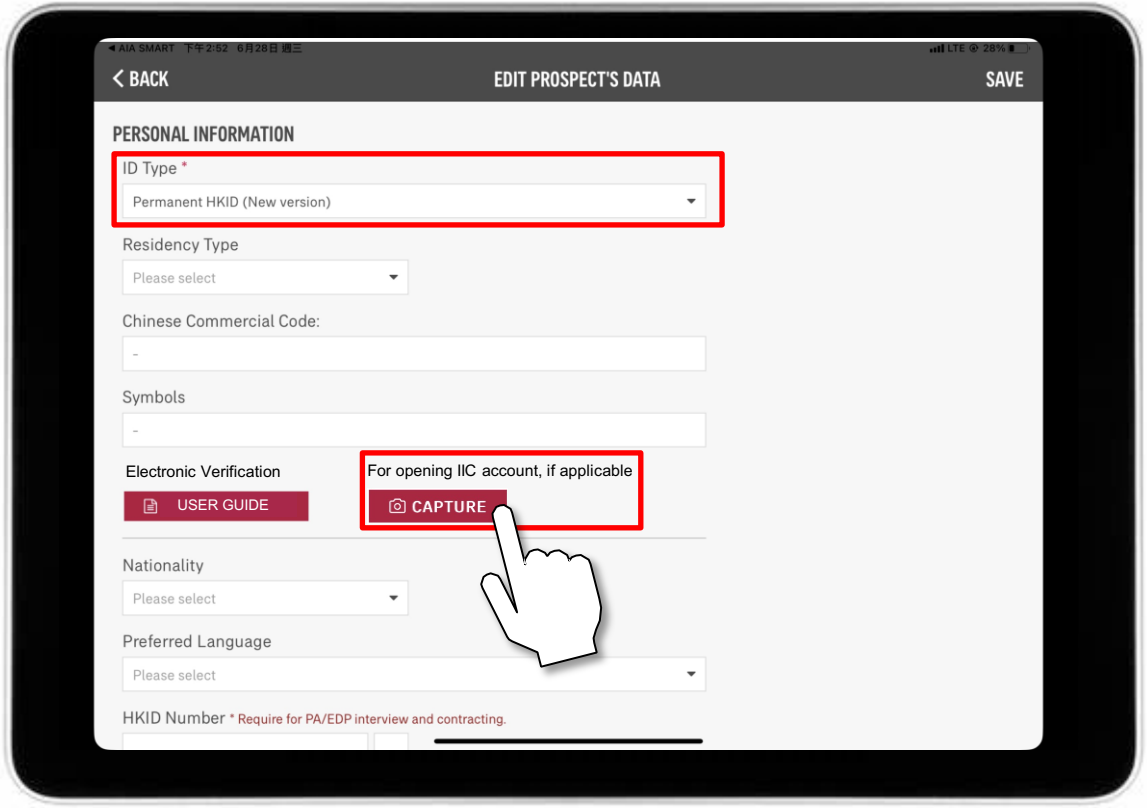
Step 1: Select ID Type

Entry Point 2: Prospect Database

CAPTURE button will be disable when no **ID Type** is selected.

1. Select **ID Type** among:
   - **Permanent HKID (New Version)**
   - **Permanent HKID (Old Version)**
   - **Non-permanent HKID (New Version)**
   - **Non-permanent HKID (Old Version)**
2. Electronic verification **CAPTURE** button is activated.



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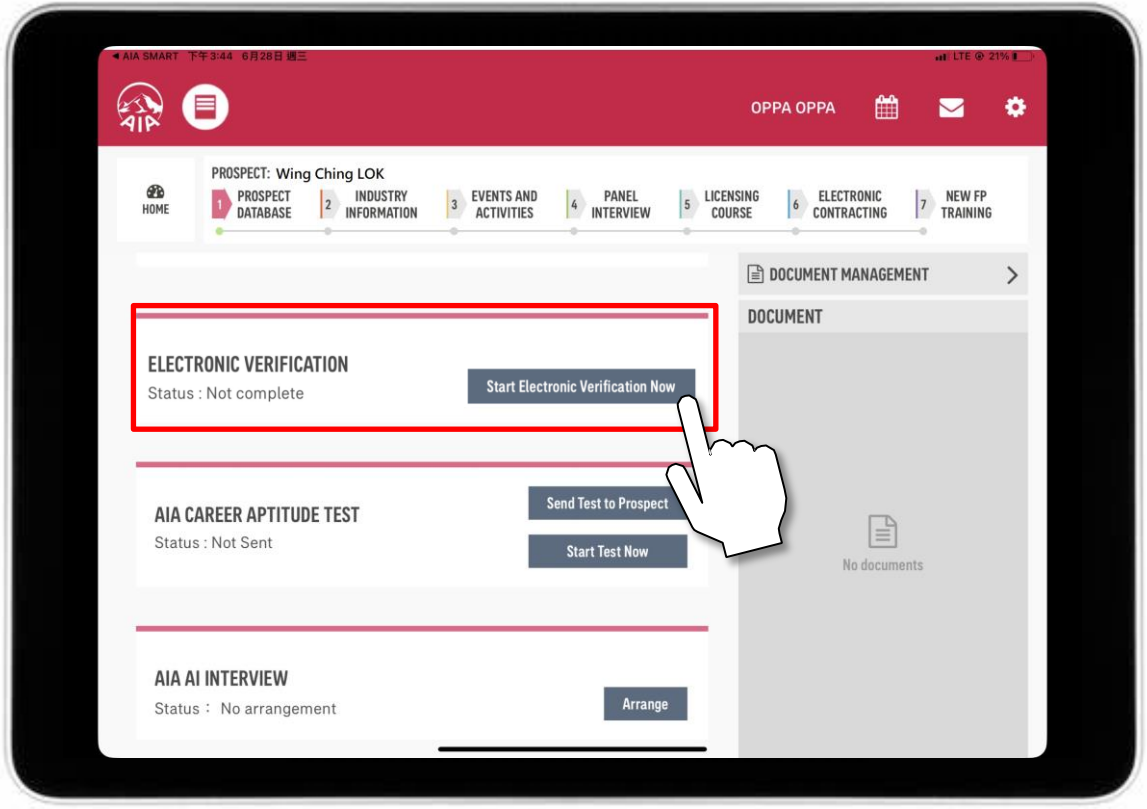
Method 2: Entry Point at Electronic Verification Section Card

Entry Point 3: Electronic Verification Section Card in Prospect Database

Recruiter can perform electronic verification at electronic verification Section Card.

1. Press **Start Electronic Verification NOW** button in **step 1 – PROSPECT DATABASE**
2. Electronic verification window shows up, recruiter can perform Electronic verification with prospect.



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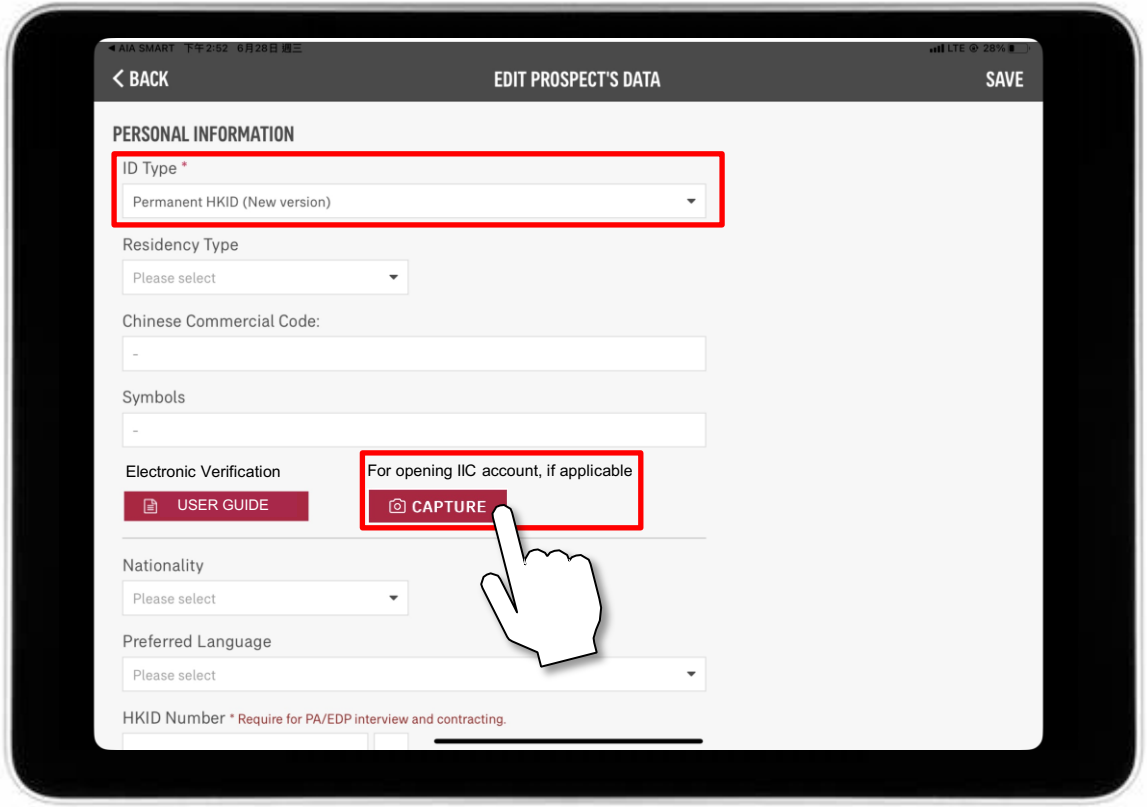
Step 1: Select ID Type

Entry Point 3: Electronic Verification Section Card in Prospect Database

CAPTURE button will be disable when no **ID Type** is selected.

1. Select **ID Type** among:
   - **Permanent HKID (New Version)**
   - **Permanent HKID (Old Version)**
   - **Non-permanent HKID (New Version)**
   - **Non-permanent HKID (Old Version)**
2. Electronic verification **CAPTURE** button is activated.



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Start Electronic Verification

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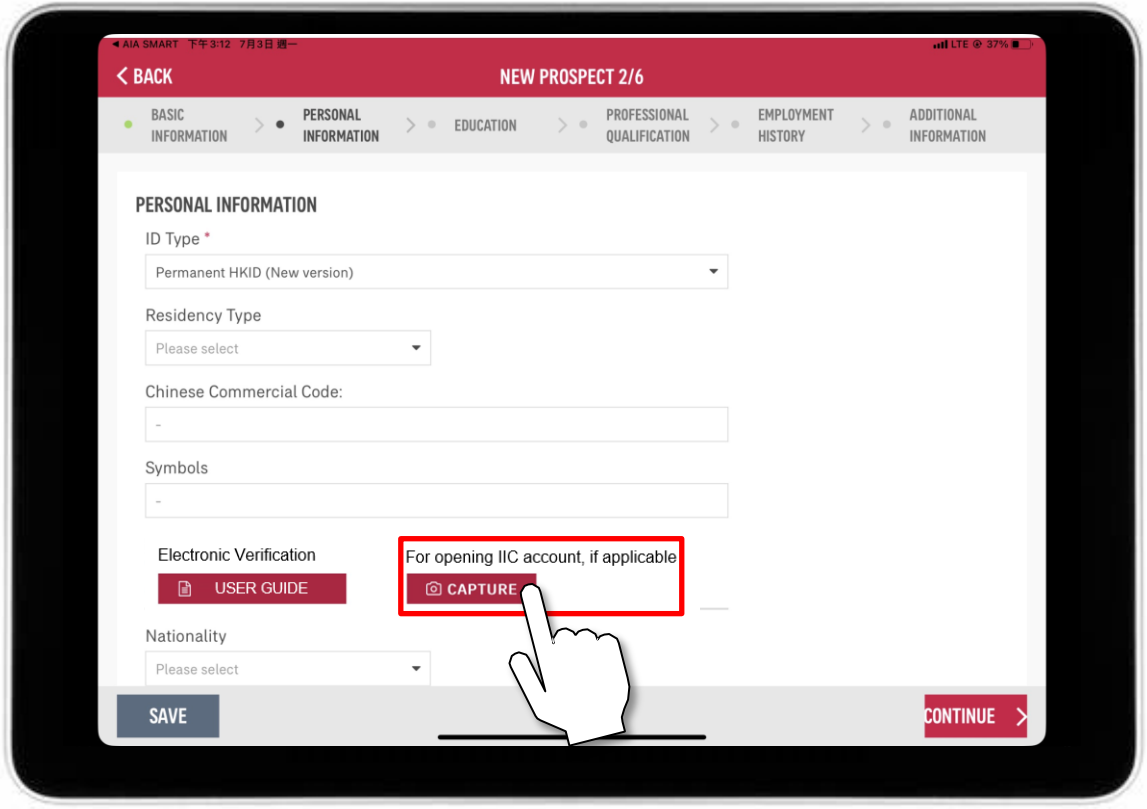
Step 2: Start Electronic Verification

You and Prospect conduct Electronic verification.

1. Press **CAPTURE** button.
2. Electronic verification window shows up.

Tips :

- **Prospect's Surname & Given Name in prospect profile must be the same of the one on prospect's HKID.**



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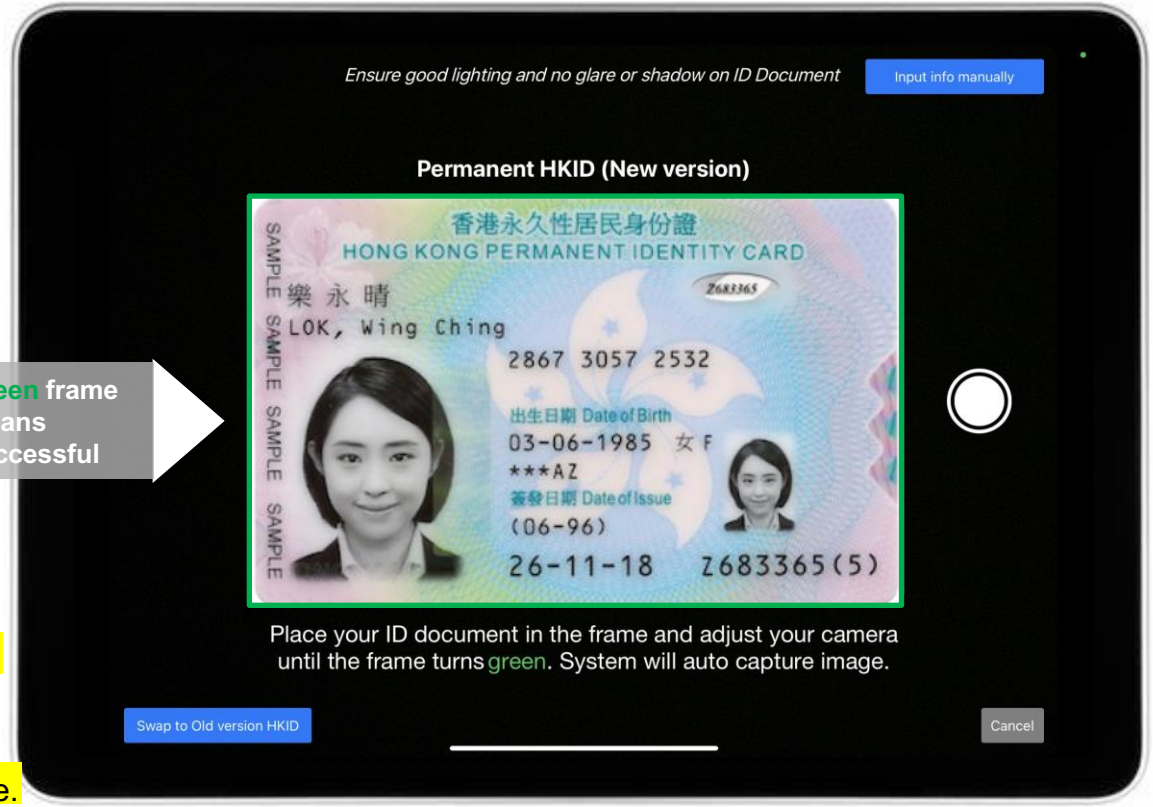
Step 3: Capture Frontside of HKID

1. Place HKID inside the frame. If HKID fits into the frame, frame turns from **Orange** to **green** and **HKID is captured automatically**.



Tips:

- Ensure good lighting.
- No shadow or glare on ID card.
- Place the document at a 45-degree angle to reduce glare.

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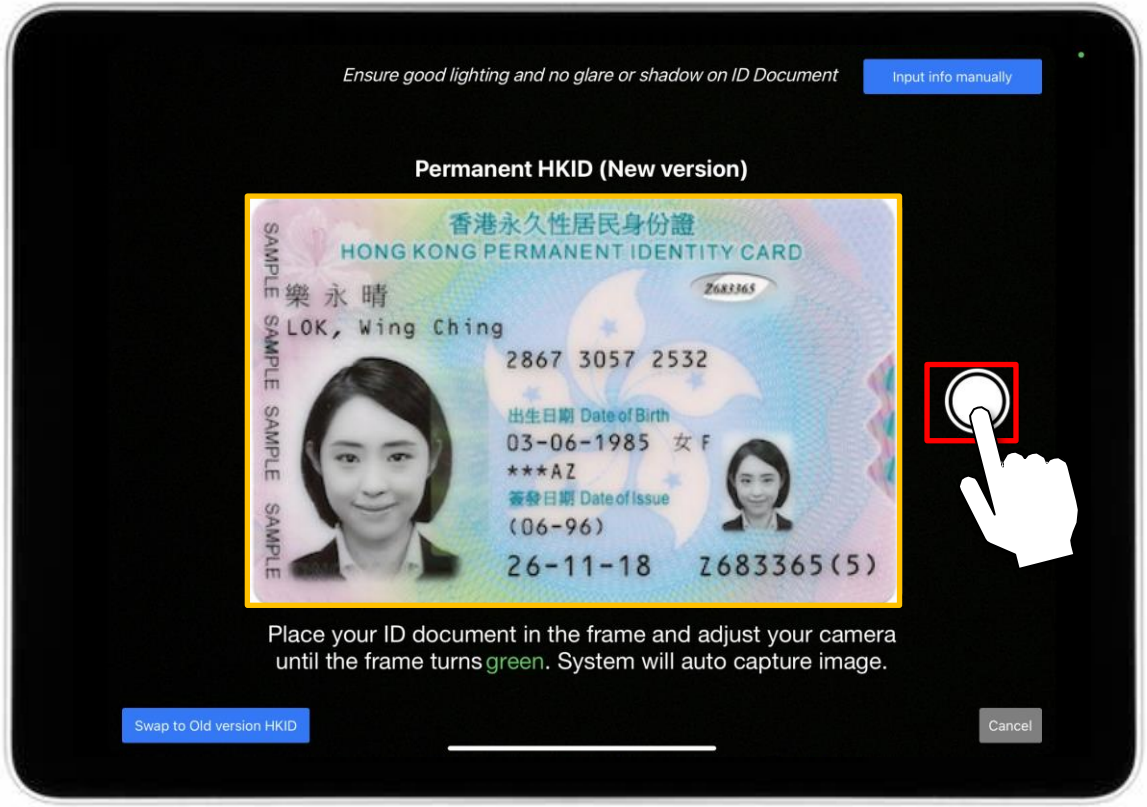
Step 3: Capture Frontside of HKID

Alternative way to capture frontside of HKID.

1. Place HKID inside the frame.
2. Press **shutter button** to capture HKID.
3. Complete step of capturing frontside of HKID.
4. Window of capturing Prospect's photo shows up.



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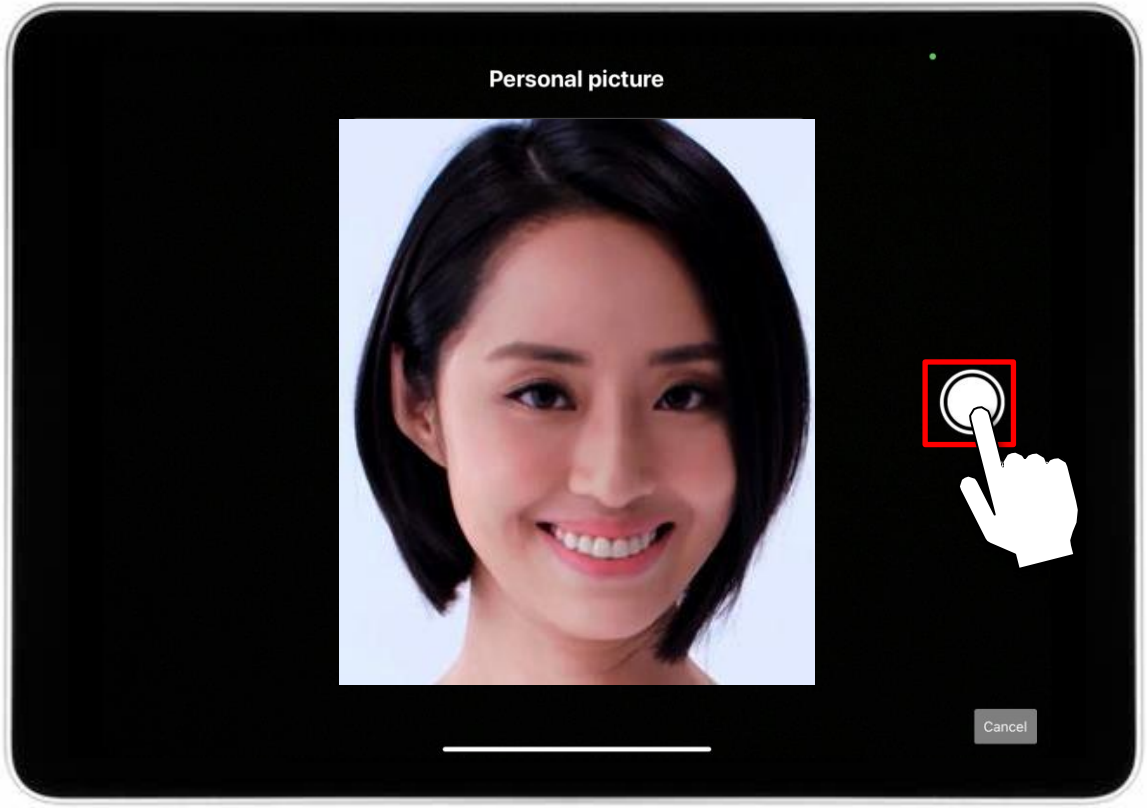
Step 4: Capture Personal Picture

Capture Prospect's selfie.

1. Place prospect's face to the frame.
2. Press **shutter button** to capture Prospect's selfie.

Page of loading electronic verification result shows up.



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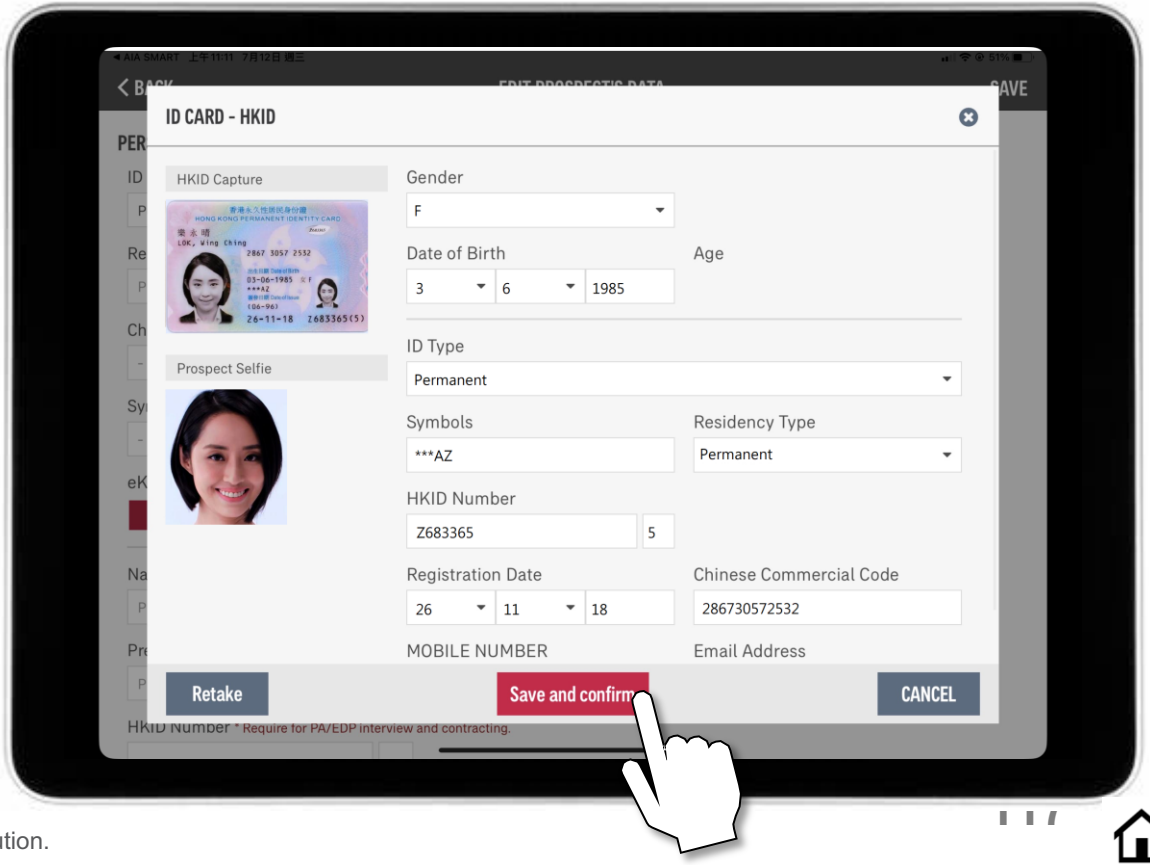
Step 5: Display Electronic Verification Successful Result

After loading, electronic verification result shows up. If there is no warning message displayed, that means electronic verification success. Electronic verification result window displays:

- Gender
- Date of Birth
- Age
- ID Type
- Symbols
- Residence Type
- HKID Number
- Registration Date
- Chinese Commercial Code
- Mobile Number
- Email Address

Press **SAVE AND CONTINUE** Electronic verification result to complete electronic verification.



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Step 6: Display Reminder Message

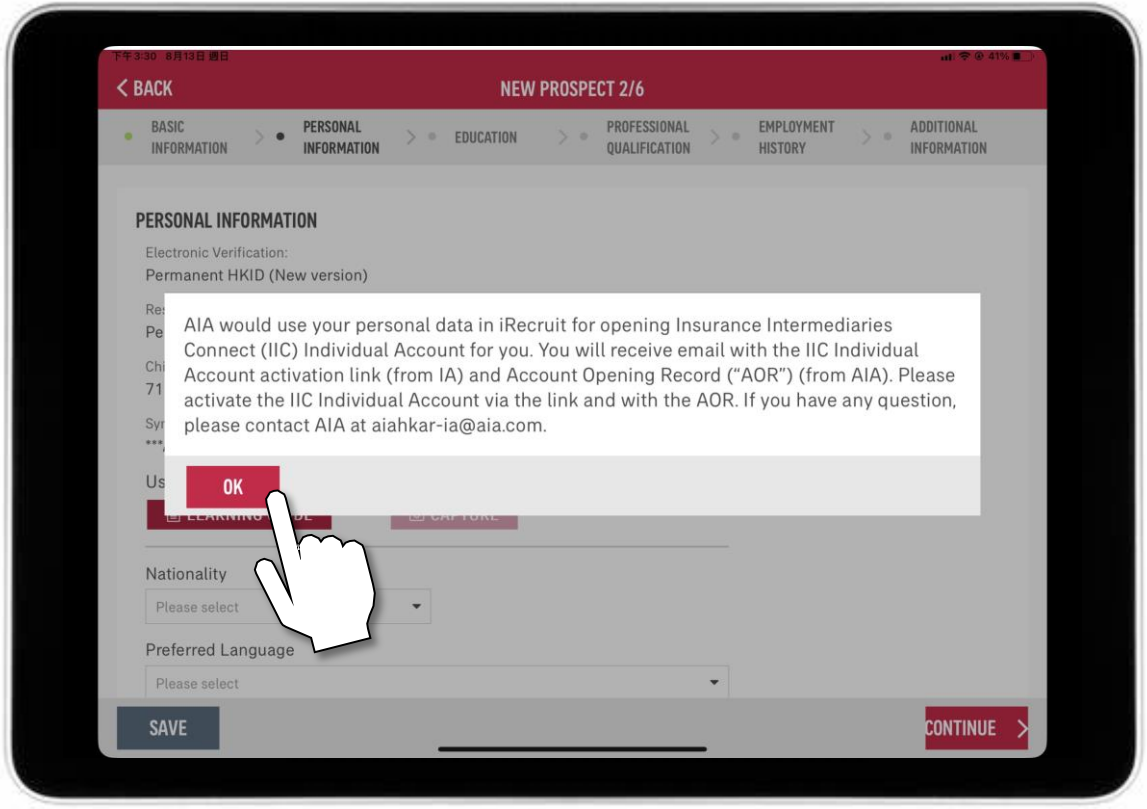
SAVE AND CONTINUE
electronic verification result to complete Electronic verification.

1. Press **OK b**utton of reminder window.
2. Press **CONTINUE** button to finish remaining steps.

Remark :

Saved data will be used for opening IIC account.

If you have any question, please contact AIA at aiahkar-ia@aia.com.



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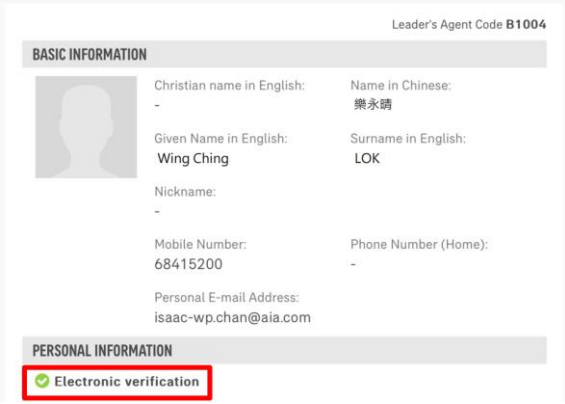
How To Know Electronic Verification Has Already Completed Successfully?

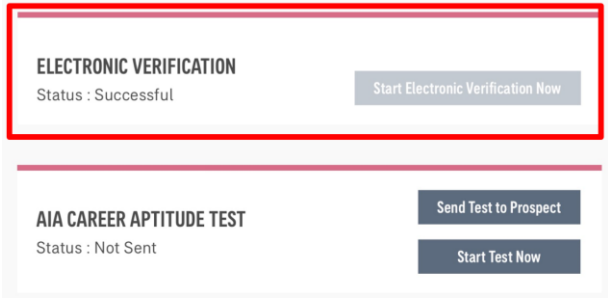
Electronic verification STATUS in **PERSONAL INFORMATION** section.

1. Status is "**green tick**" symbol.



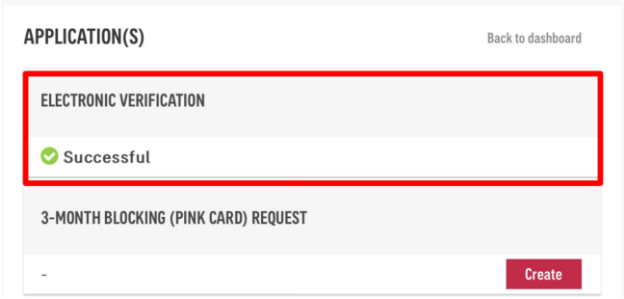
Electronic verification Section Card in **Step 1 – PROSPECT DATABASE**.

1. Status is **Successful**.
2. Button of **Start Electronic Verification Now** is



Electronic verification Section Card in **Step 6 – ELECTRONIC CONTRACTING**.

1. Status is **Successful**.
2. Button of **Start Electronic Verification Now** is removed.



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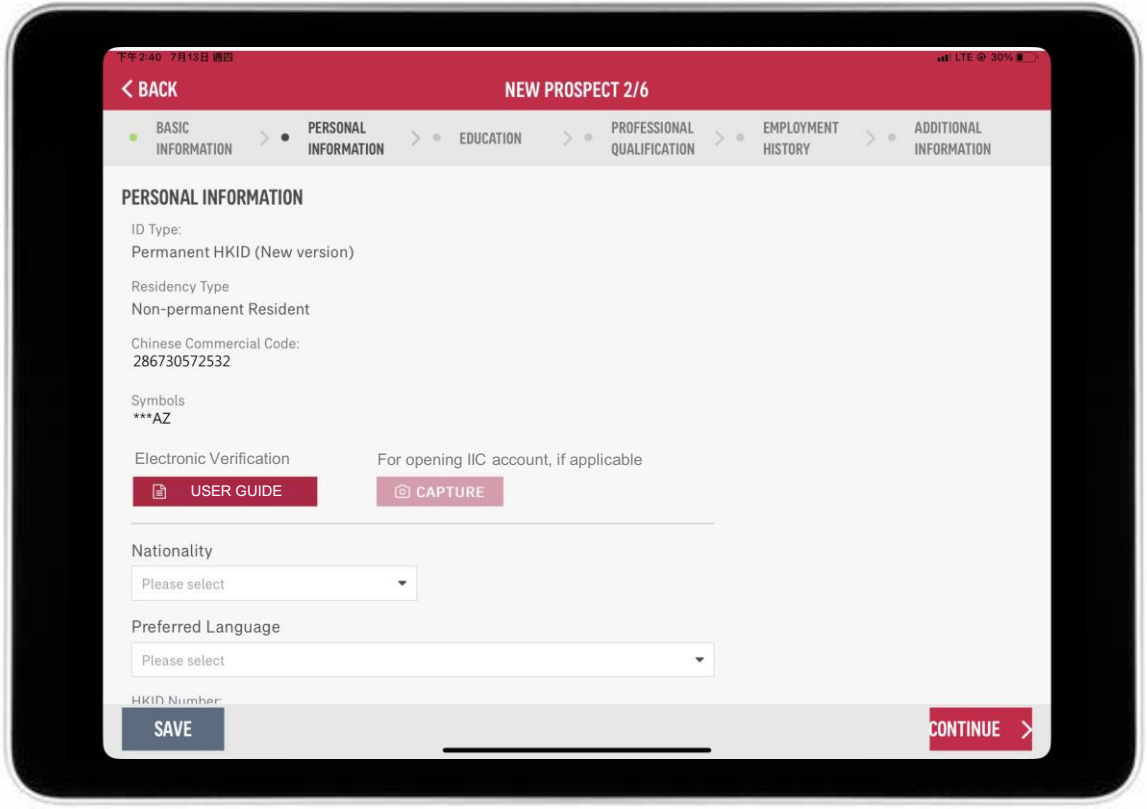
Completed Electronic Verification Successfully – Verified Data Will be filled to Prospect Database on iRecruit

After successfully complete and confirm results of electronic verification:

1. Electronic verification results are filled to related fields automatically.
2. Related fields are locked and cannot be amended.



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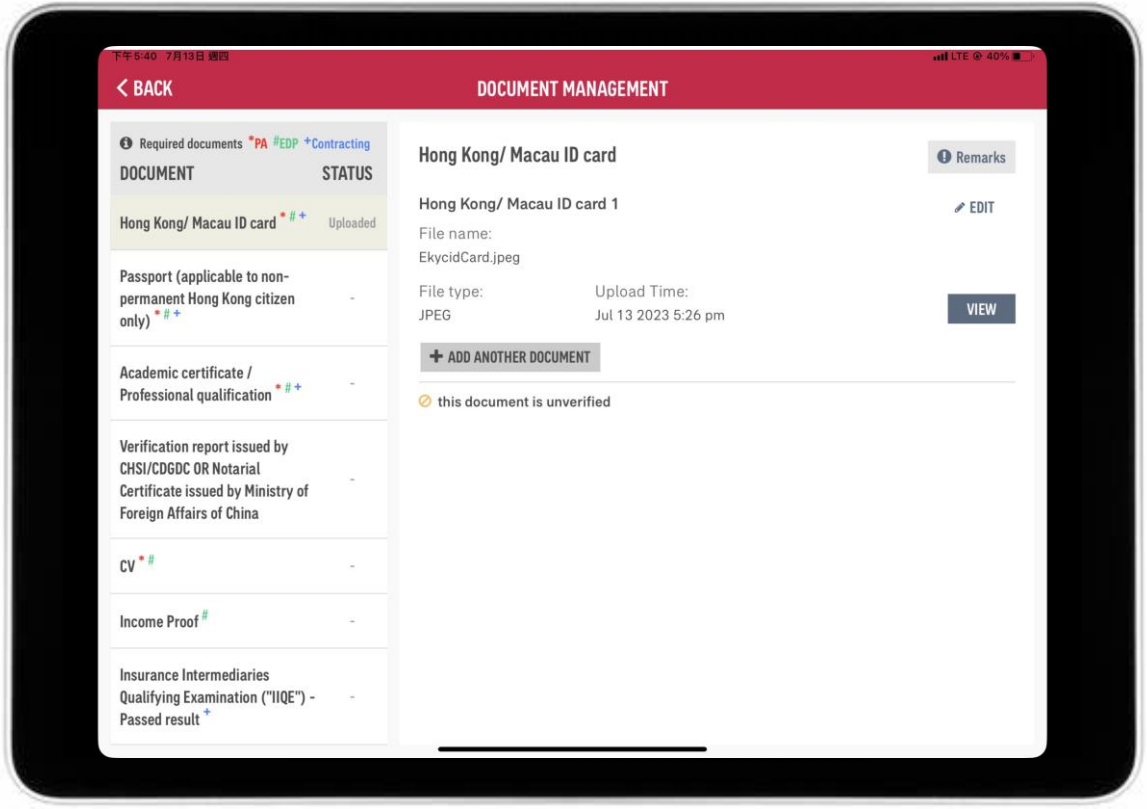
[AIA – INTERNAL]

Completed Electronic Verification Successfully – Captured HKID Will Be Uploaded to Document Management

After successfully complete and confirm results of electronic verification:

Auto upload captured HKID to DOCUMENT MANAGEMENT when electronic verification result is successful.



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Reload Electronic Verification Result

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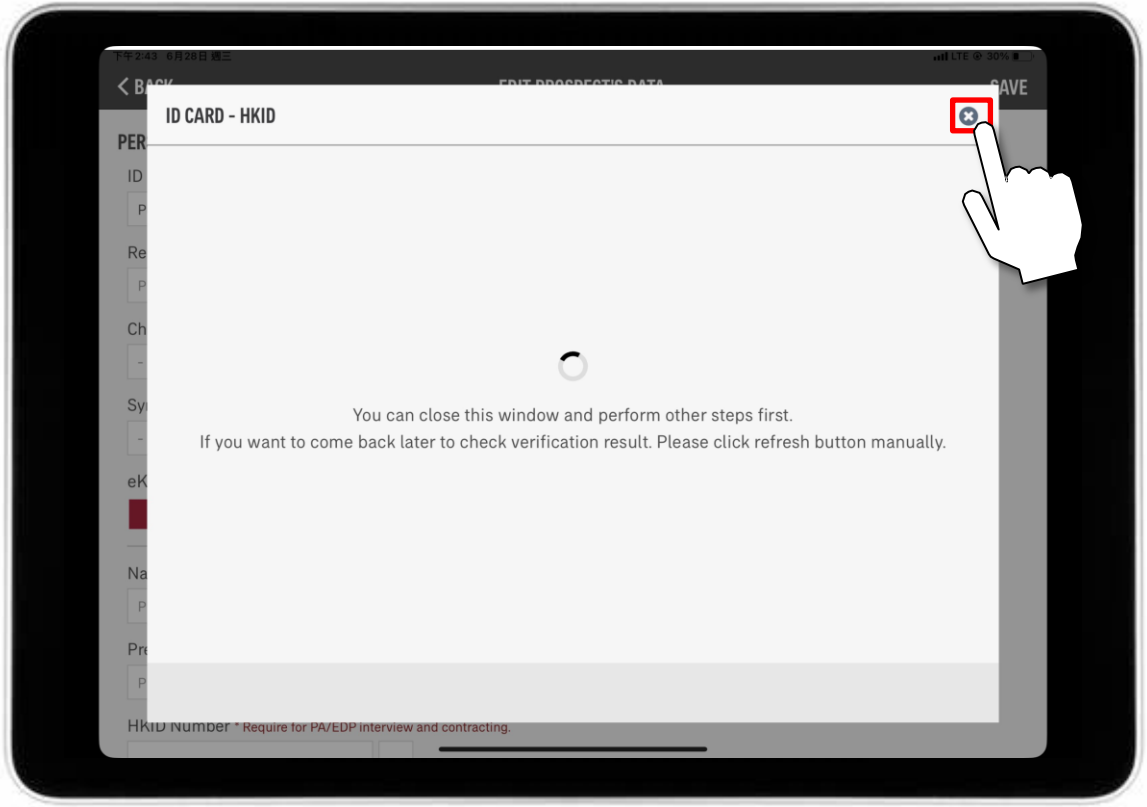
Check Back Later for Electronic Verification Result

Loading page will be changed to below after 15 seconds waiting.

1. You are able to close the pop-up window and perform other application steps OR keep waiting for the electronic verification results.



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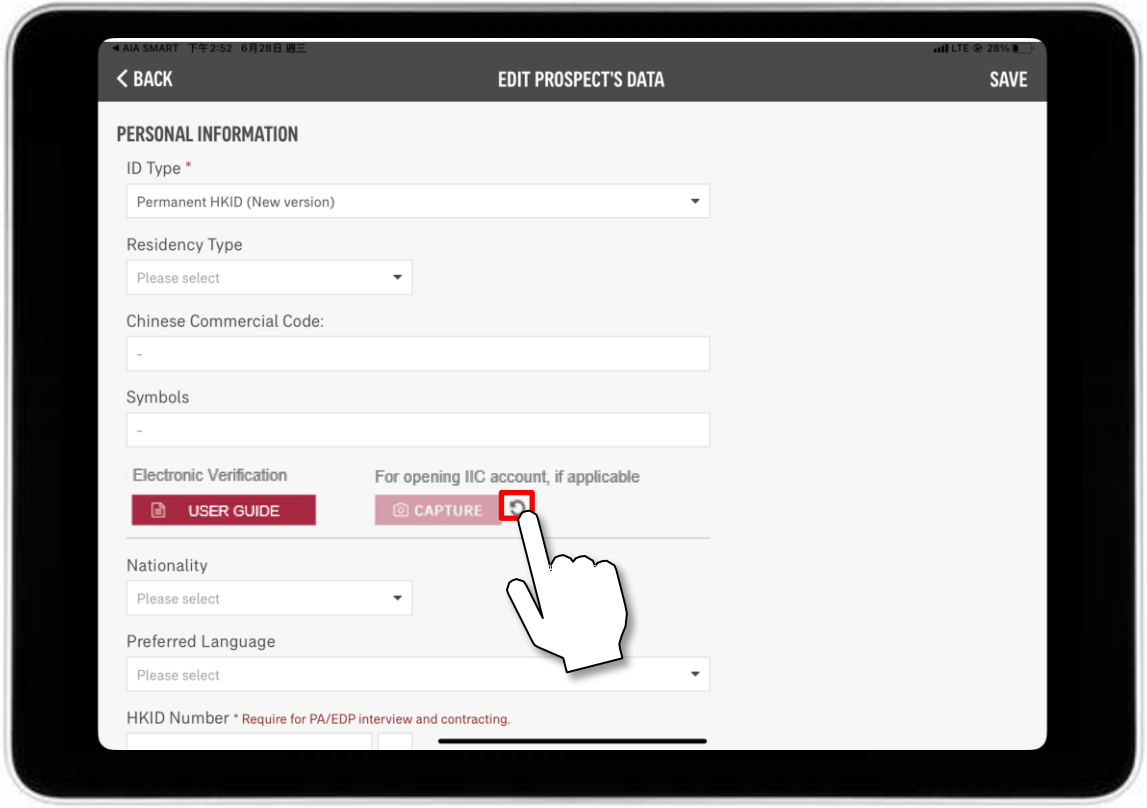
Reload Electronic Verification Result

If You close the pop-up window, recruiter can click the **refresh** button.

1. Electronic verification result window shows up if electronic verification result is ready.



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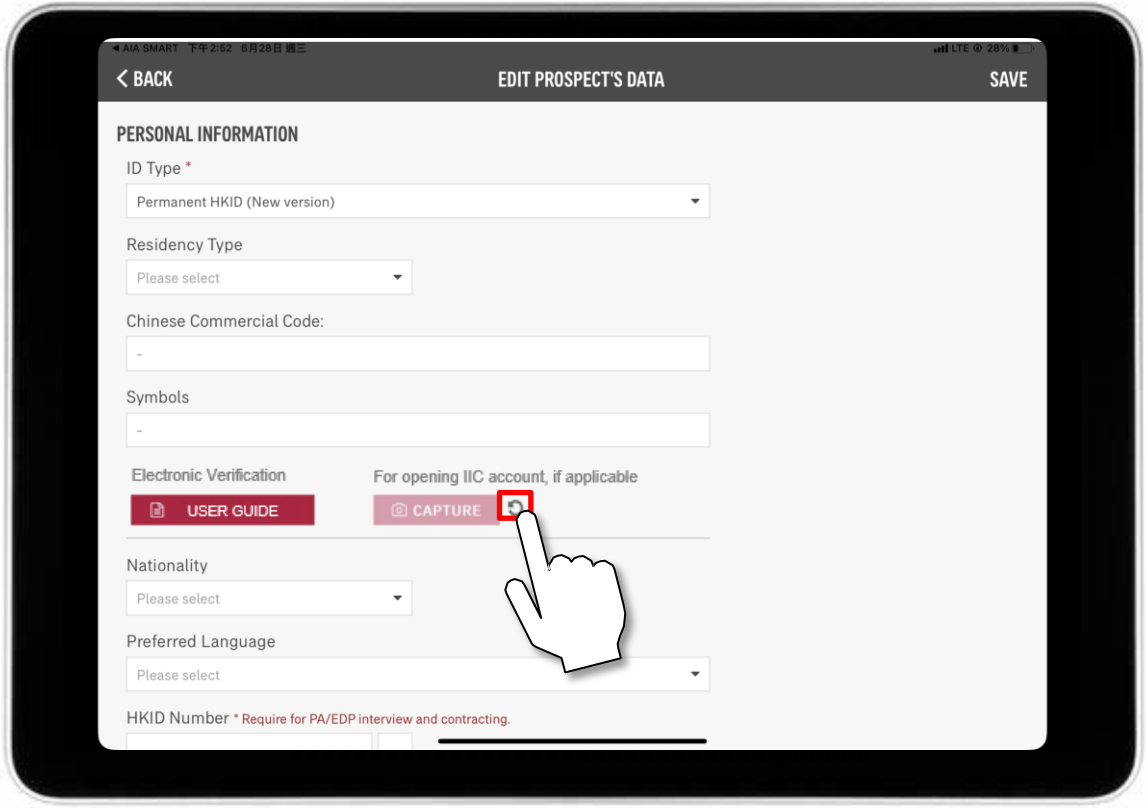
Reload Electronic Verification Result

If you close the pop-up window, recruiter can click the **refresh** button.

1. Loading page shows up if electronic verification result is not ready.
2. You are able to close the pop-up window and perform other application steps OR keep waiting for the results.



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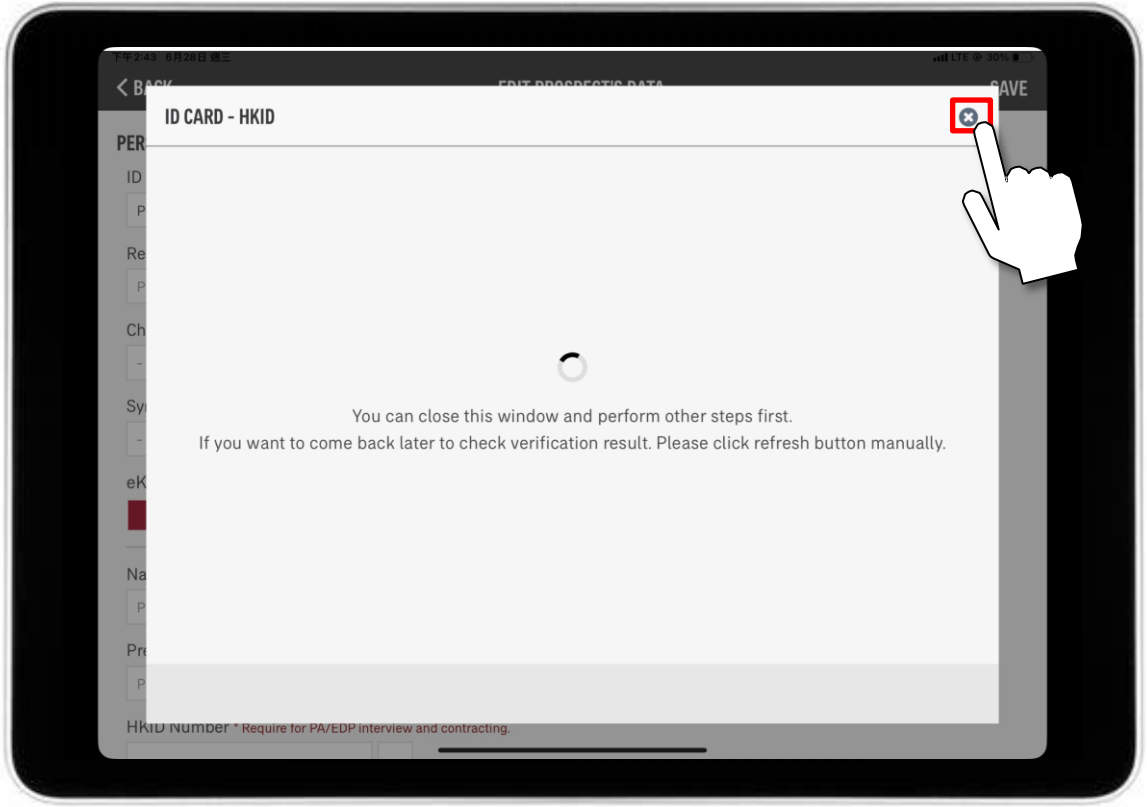
Check Back Later for Electronic Verification Result

If you close the pop-up window, recruiter can click the **refresh** button.

1. Loading page shows up if electronic verification result is not ready.
2. You are able to close the pop-up window and perform other application steps OR keep waiting for the results.



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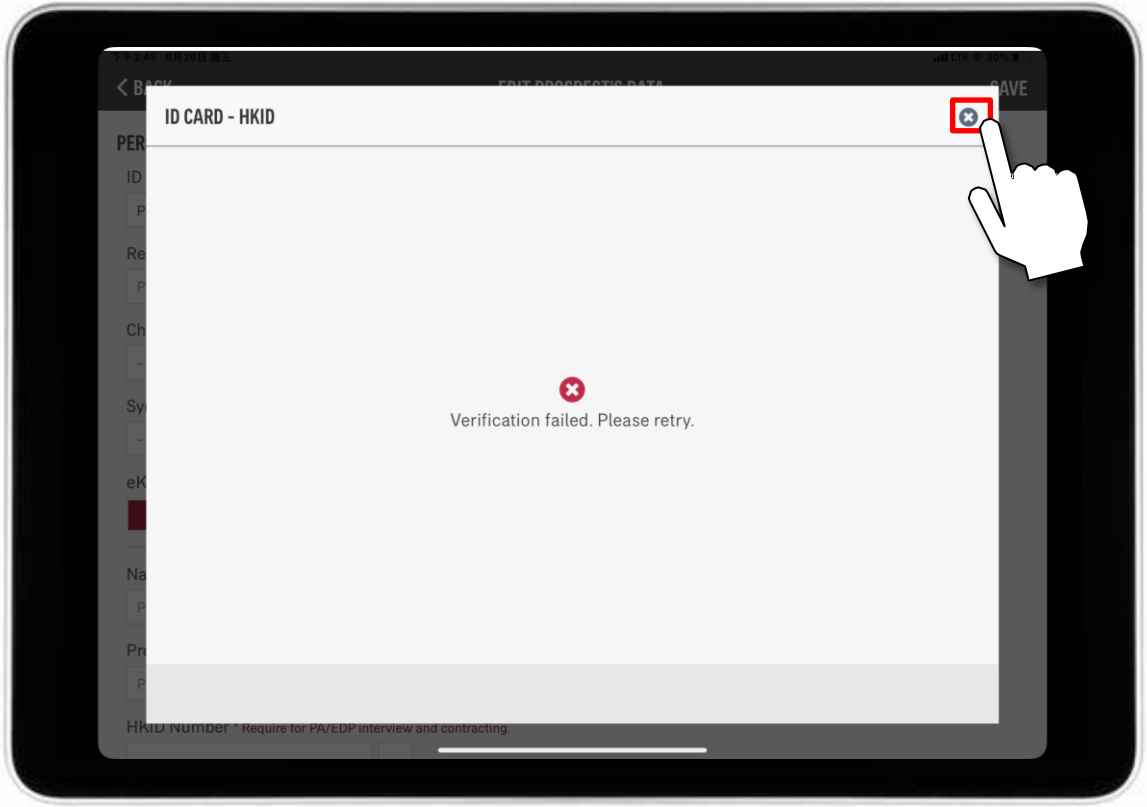
Verification Failed

If you close the pop-up window, recruiter can click the **refresh** button.

1. Error page shows up if electronic verification result is fail.
2. You can close the pop-up window and press **Capture** button again for retry electronic verification.



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How Can I Retry Electronic Verification if Electronic Verification fails?

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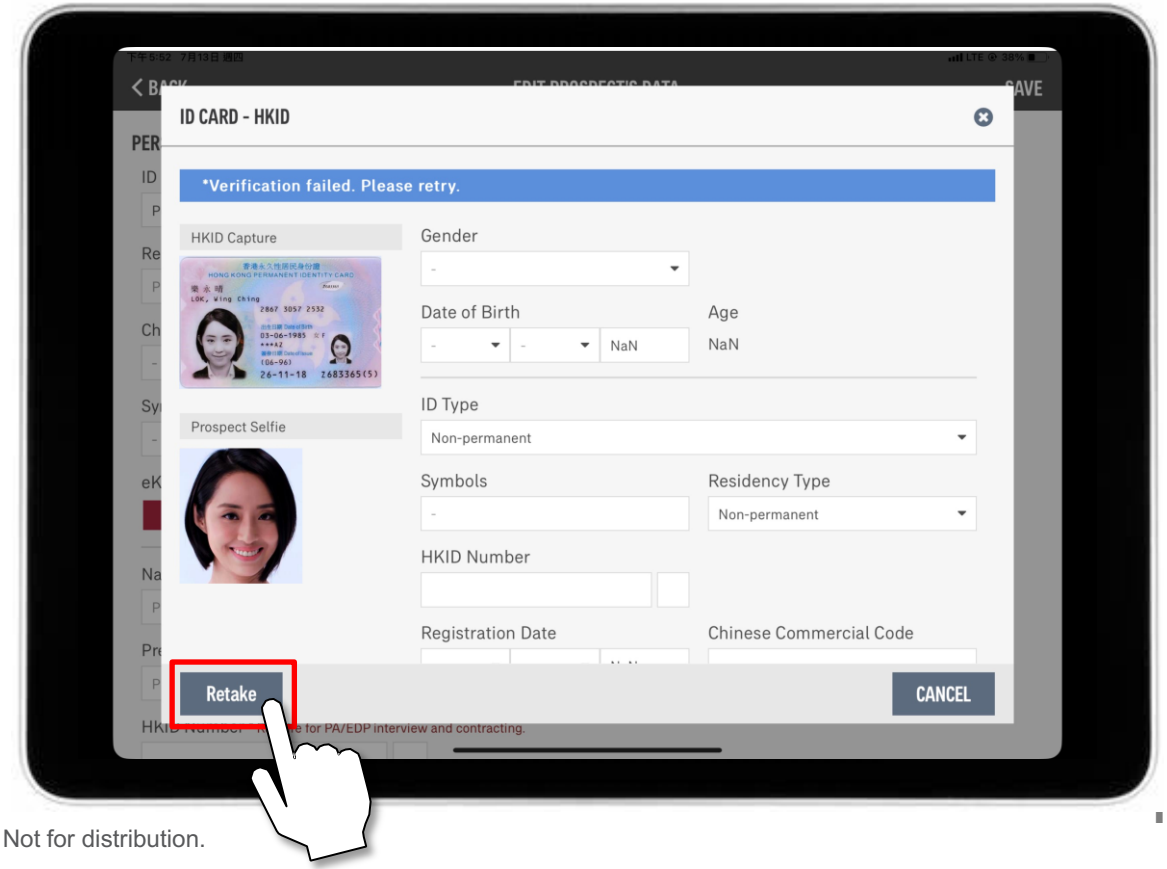
Retry Electronic Verification

Prerequisite

Complete capturing prospect's HKID and selfie.

If electronic verification result is fail when Electronic verification result = Fail.

1. Press **Retake** button for retry electronic verification, then you can retry electronic verification process with prospect.



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Can I Be Waived From Electronic Verification After 4 Consecutive Electronic Verification failures?

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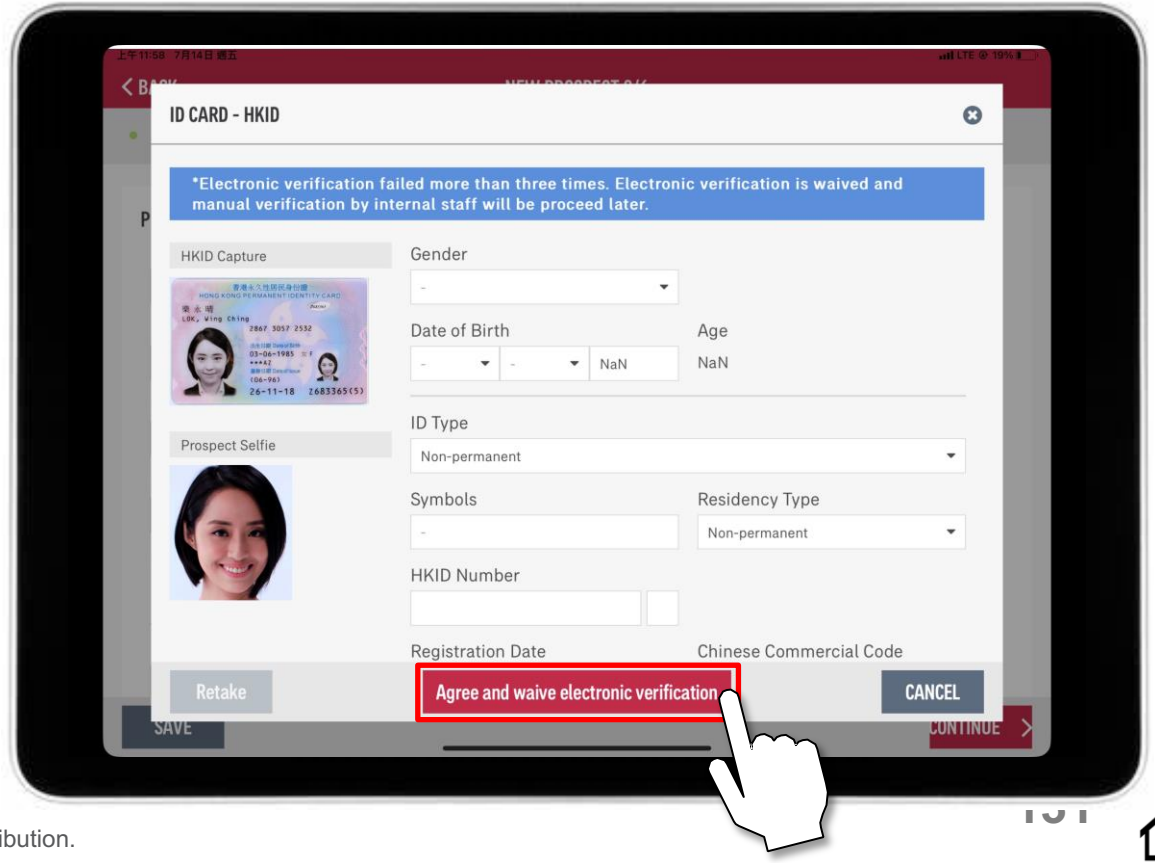
After 4 Consecutive Electronic Verification failures, You Can Waive Electronic Verification

When You and prospect encounter 4 Consecutive Electronic Verification failures, you can waive electronic verification.

Waive electronic verification when you and Prospect fail electronic verification in consecutive 4 times.

1. Press **Agree and Waive** button for waiving electronic verification. Internal Staff will contact Prospect to perform identity verification.
2. Electronic verification results are filled to related fields automatically.
3. Related fields are not locked and can be amended.



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Display Reminder Message

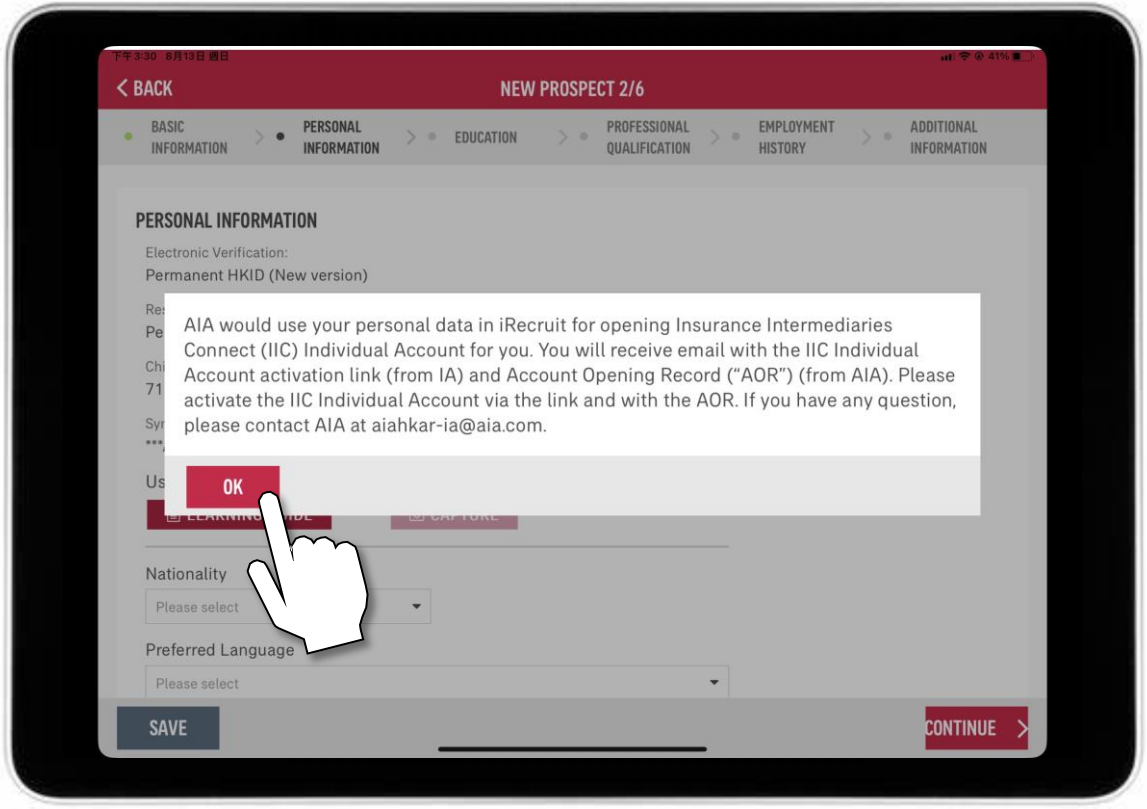
Waive electronic verification result to complete electronic verification.

1. Press **OK b**utton of reminder window.
2. Press **CONTINUE** button to finish remaining steps.

Remark :

Saved data will be used for opening IIC account.

If you have any question, please contact AIA at aiahkar-ia@aia.com.



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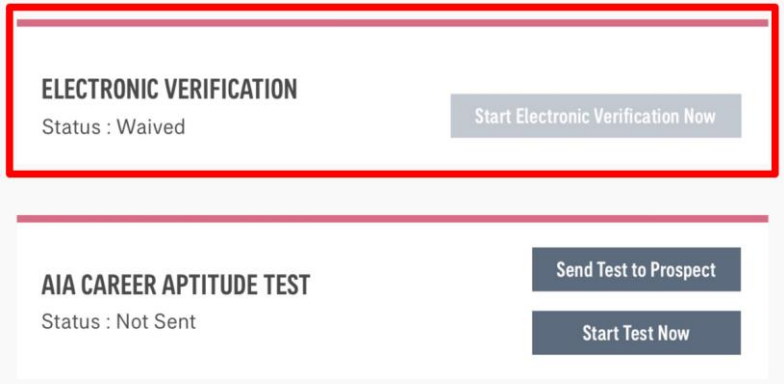
Electronic Verification Status Changes To Waived

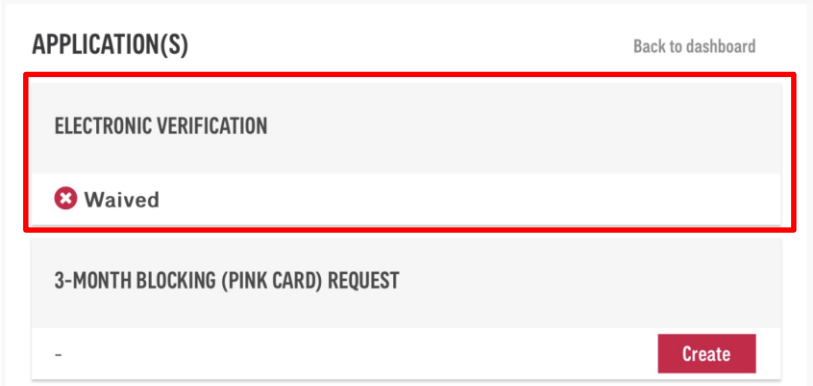
Electronic verification Section Card in **Step 1 – PROSPECT DATABASE**.

1. Status changes to **Waived**.
2. Button of **Start Electronic**



Electronic verification Section Card in **Step 6 – ELECTRONIC CONTRACTING**.

1. Status changes to **Waived**.
2. Button of **Start Electronic Verification Now** is removed.



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Can I Be Waived From Electronic Verification If I Have Not Had a meetup With Prospect When I Submit CR Application?

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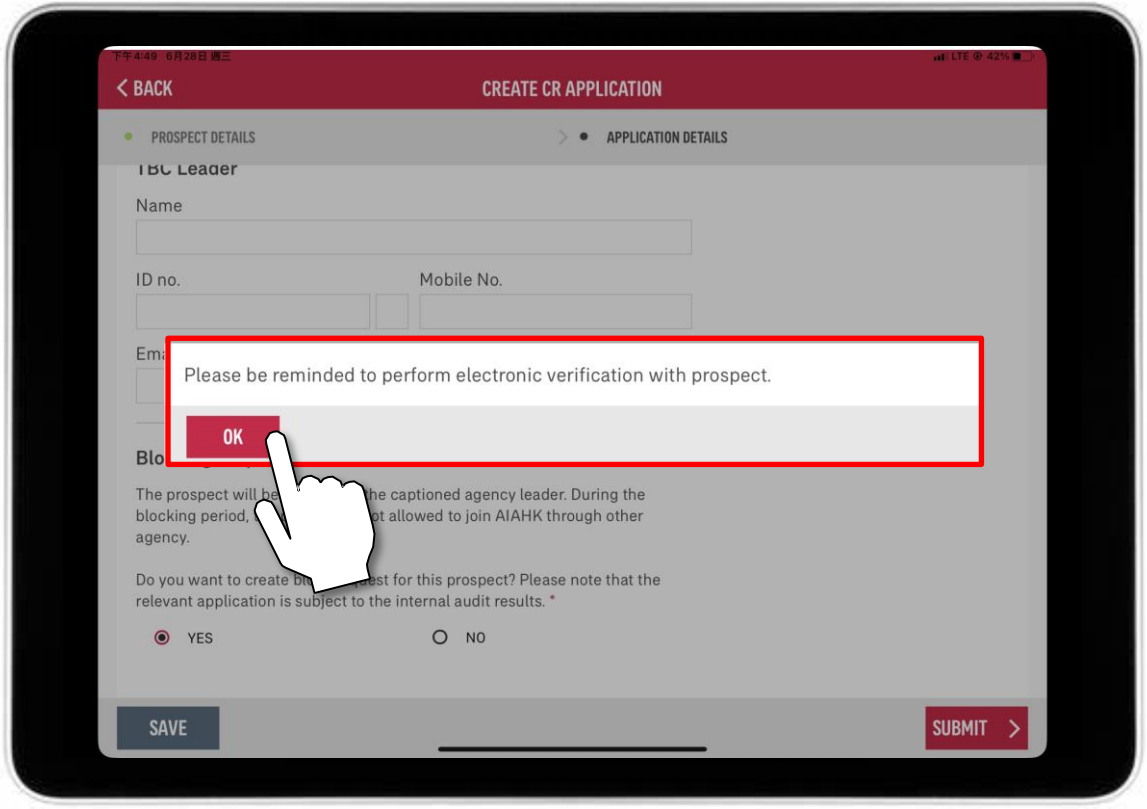
When You create CR Application, System Will Display Electronic Verification Reminder Message

When you create CR application, if you have not complete electronic verification with prospect, system will display electronic verification reminder message.



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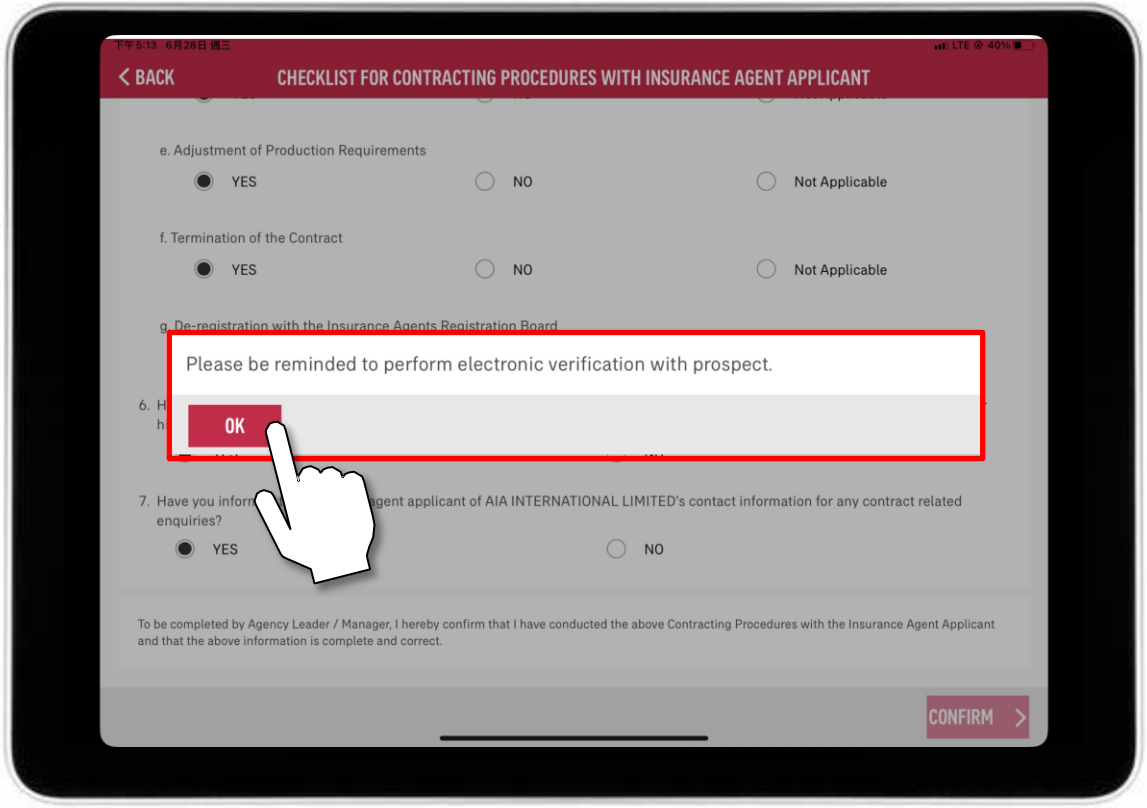
When You create CR Checklist, System Will Display Electronic Verification Reminder Message

When you create CR Checklist, if you have not complete electronic verification with prospect, system will display electronic verification reminder message.



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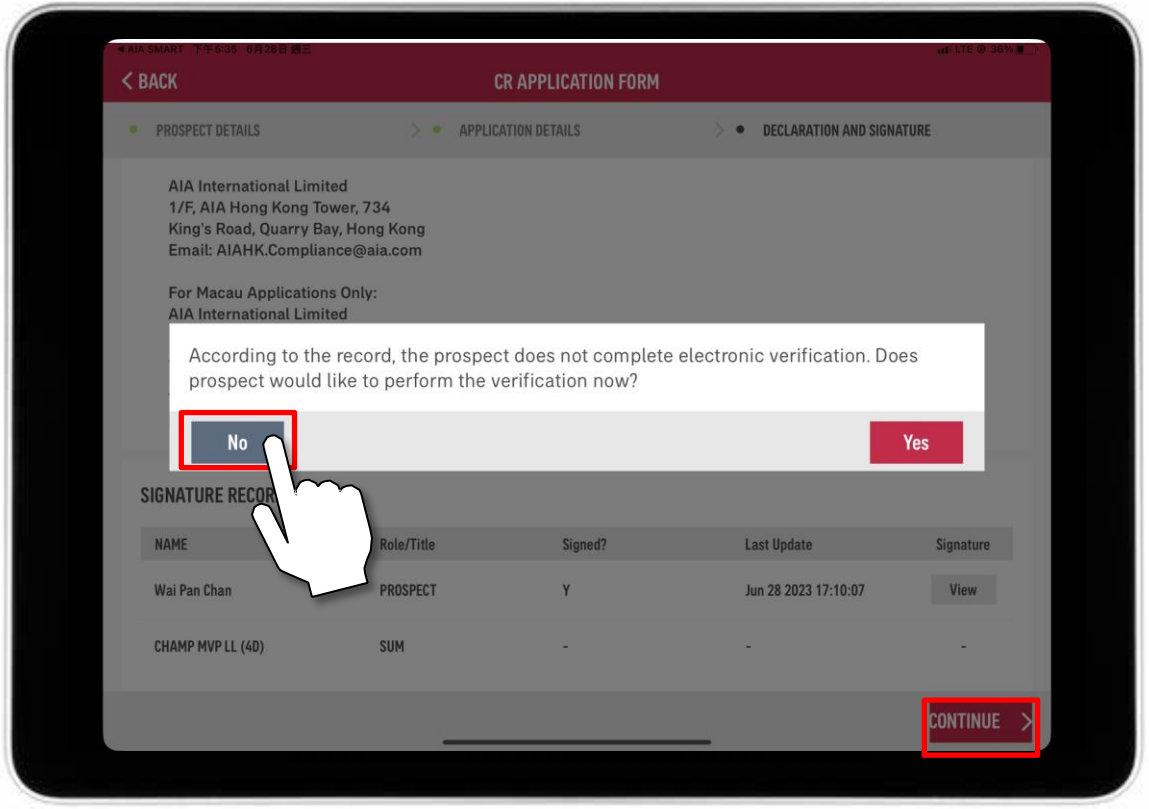
If You Have Not Had a meetup With Prospect, You Can Open IIC Account Via Paper Form

If you cannot meet prospect before signing CR application.

1. Waiving window shows up when you complete signing CR Application Form.
2. Press **No** to waive Electronic verification.
3. Electronic verification is waived and Internal Staff will contact Prospect to perform identity verification.
4. Prospect is required to fill in and submit IA registration form to AIA.



Remark :

Prospect needs to submit the completed "Application for Insurance Authority (IA) Insurance Intermediaries Connect Account" application form together with the Prospect's HKID copy to the Company. Otherwise, this CR application cannot be further processed.

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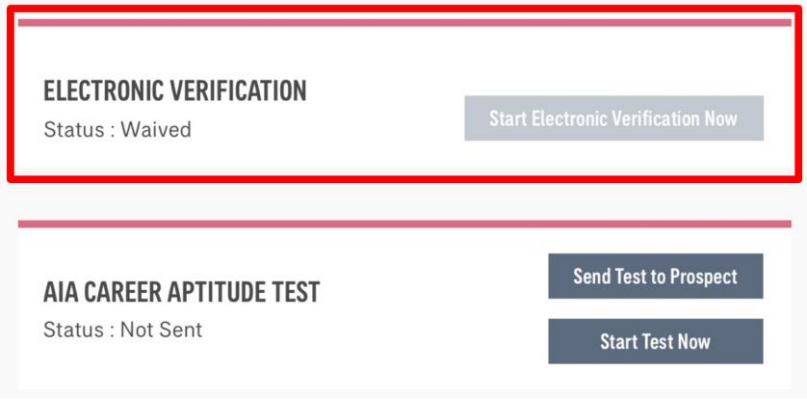
After Waiving Electronic Verification, You need To Open IIC account Via Paper Form

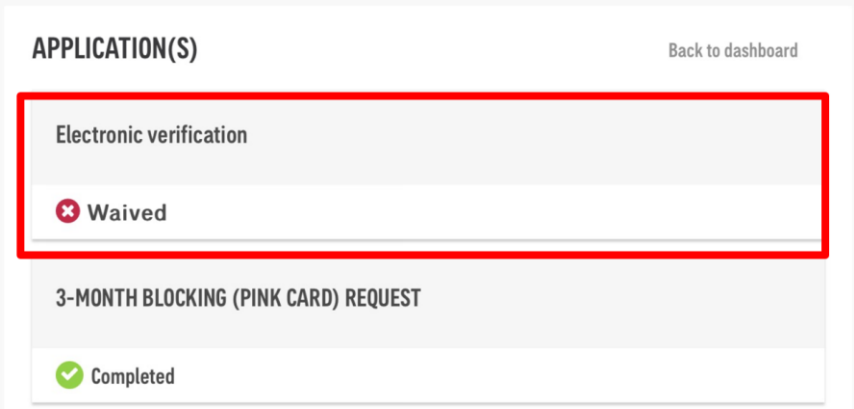
Electronic verification Section Card in **Step 1 – PROSPECT DATABASE**.

1. Status changes to **Waived**.
2. Button of **Start Electronic Verification Now** is disable.



Electronic verification Section Card in **Step 6 – ELECTRONIC CONTRACTING**.

1. Status changes to **Waived**.
2. Button of **Start Electronic Verification Now** is removed.



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How Can I Change ID Type During Electronic Verification Process?

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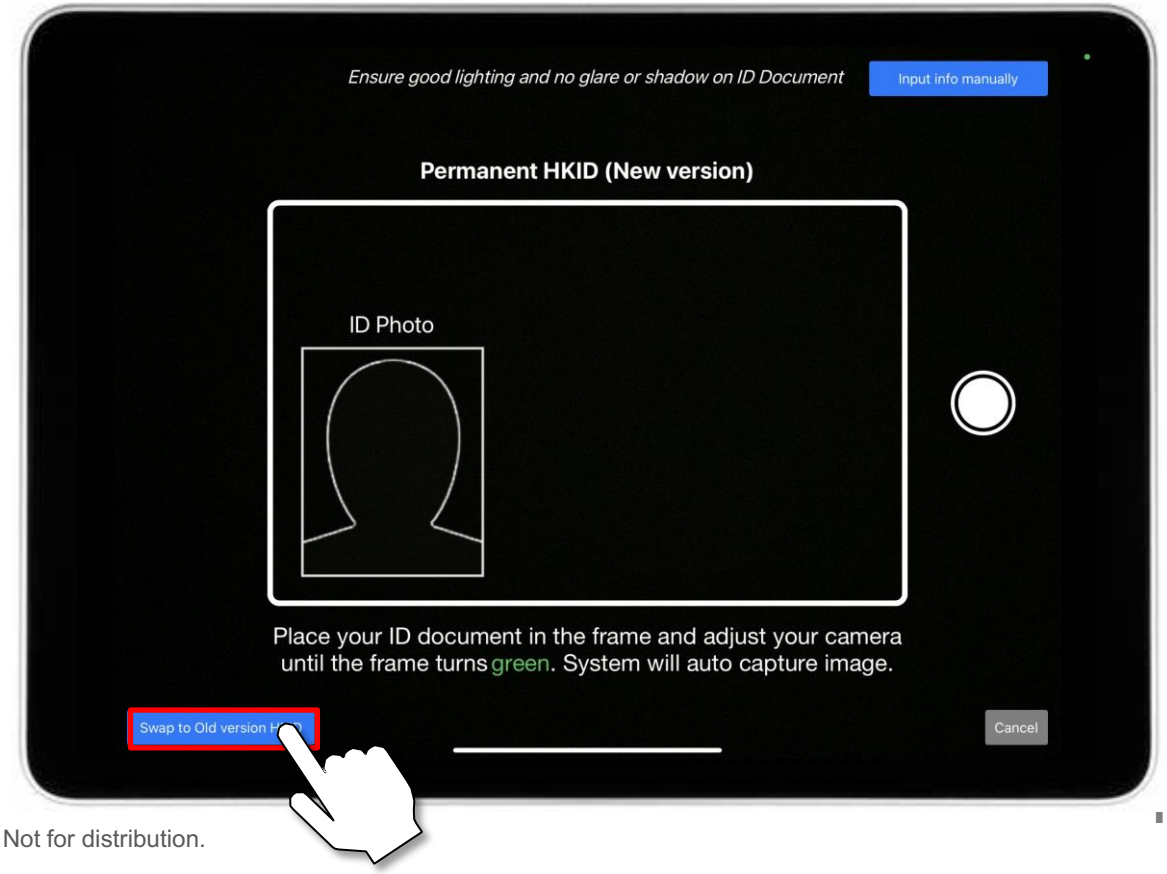
Change to HKID Old Version

You can change HKID version from new version to old version.

1. Switch to **Old version HKID**.



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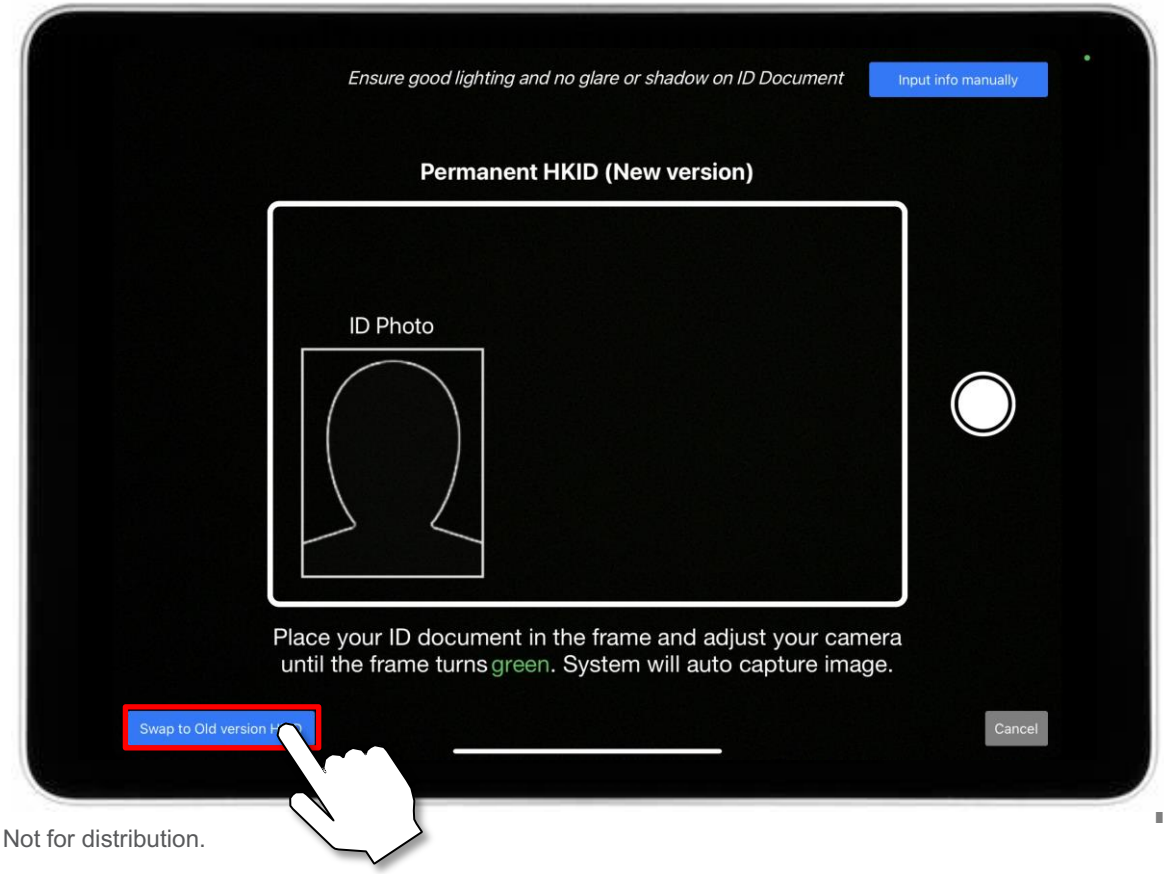
Change to HKID New Version

You can change HKID version from old version to new version.

1. Switch to **New version HKID**.



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Interrupt Process While Performing Electronic Verification

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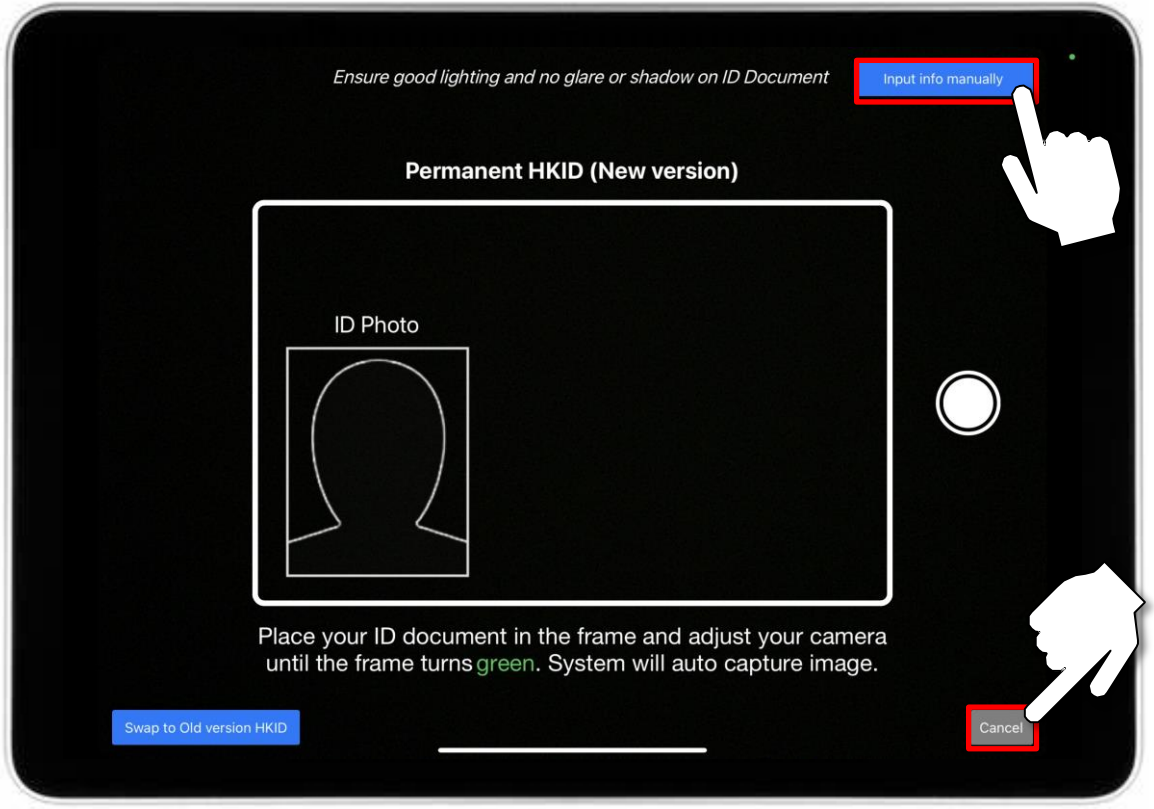
Interrupt Process While Performing Electronic

How to cancel electronic verification during electronic verification process.

1. Press **Input info manually** or **Cancel** button to go back to original page.



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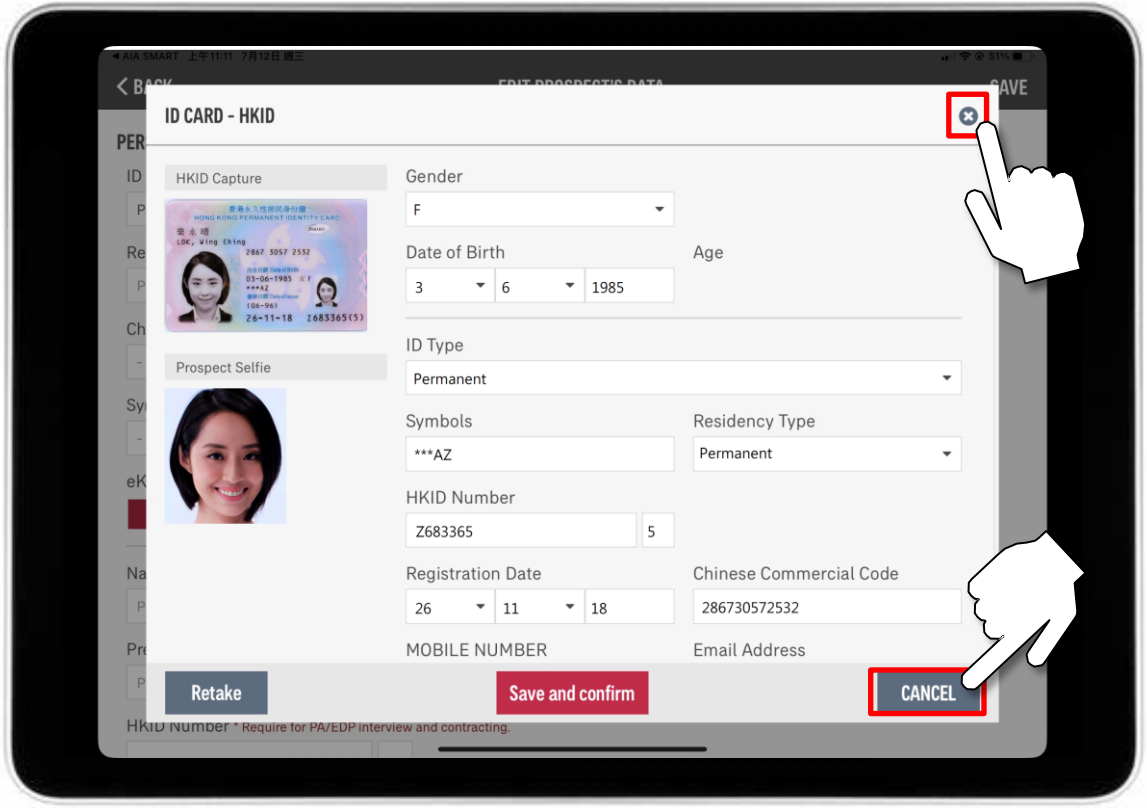
[AIA – INTERNAL]

Interrupt Process While Performing Electronic

Cancel electronic verification at electronic verification result window.

1. Press **X** or **Cancel** button to go back to original page.



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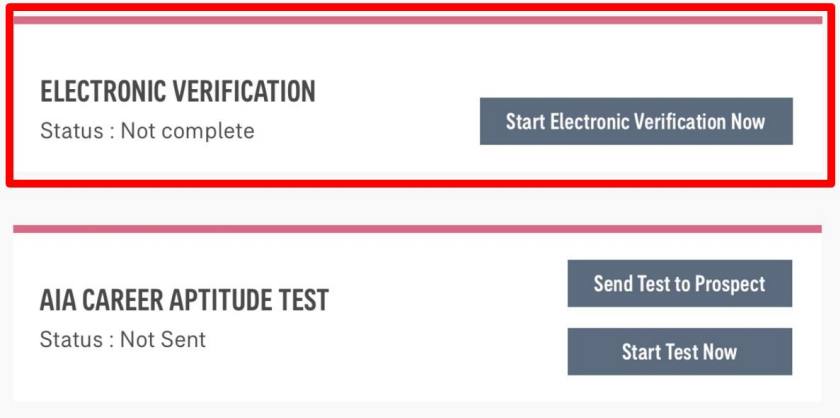
Electronic Verification Status Changes To Not Complete

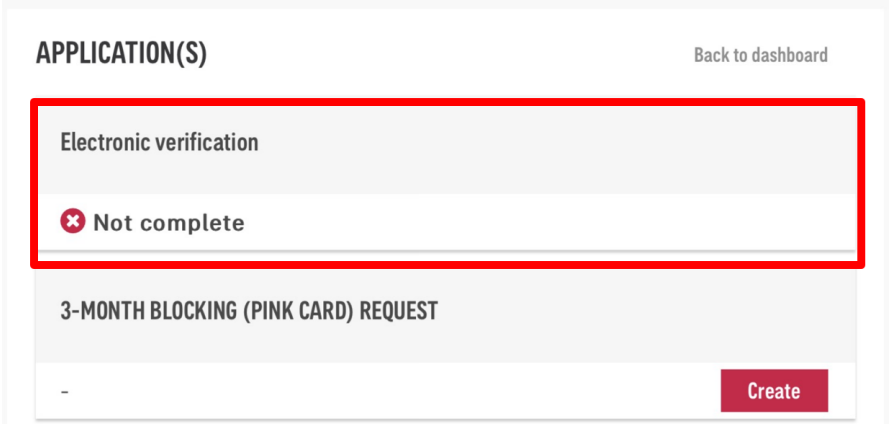
Electronic verification Section Card in **Step 1 – PROSPECT DATABASE**.

1. Status changes to **Not complete**.



Electronic verification Section Card in **Step 6 – ELECTRONIC CONTRACTING**.

1. Status changes to **Not complete**.



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Electronic Verification Guidebook

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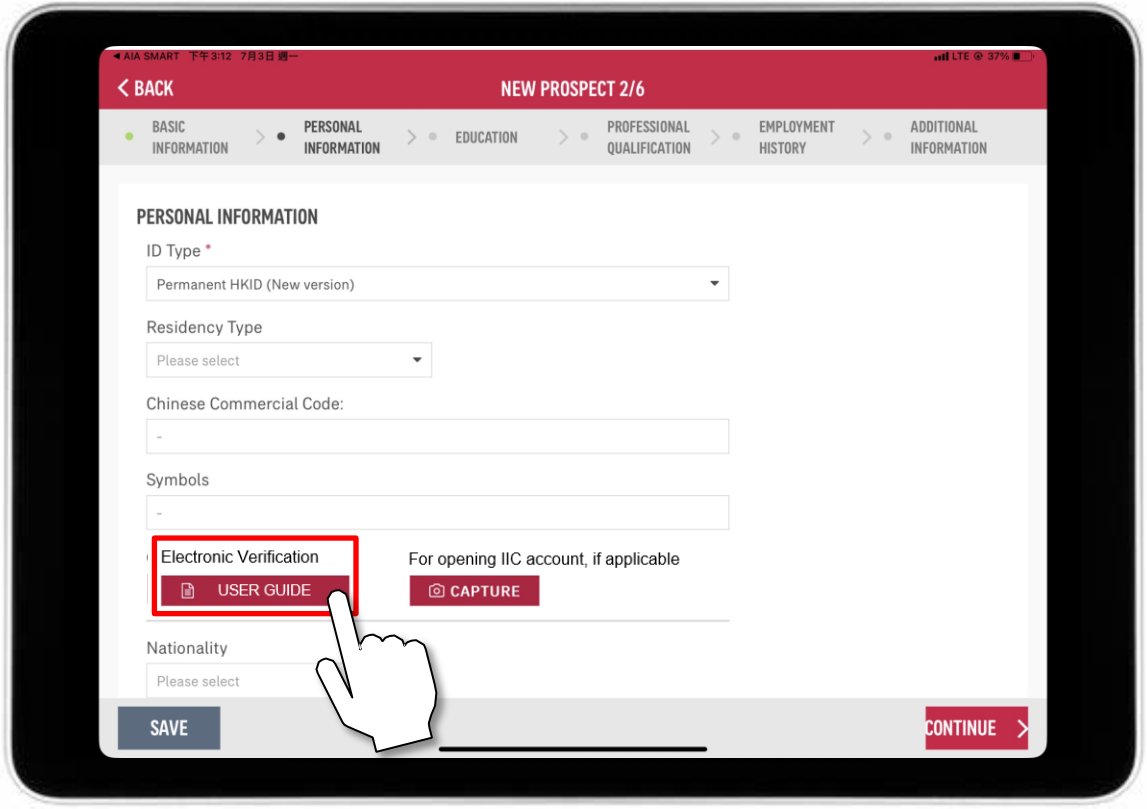
Quick Accessing Guidebook

Internal | Recruiter

If there is any questions, you and Prospect can read Learning Guide before conducting electronic verification.

1. Press **LEARNING GUIDE** button.
2. Electronic verification Learning Guide is displayed.



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Technical Support & Question Related To IIC Account Opening

Internal | Recruiter

- If you encounter technical problems, you can email the technical difficulties that you encounter to hk.helpdesk@aia.com.
- If you have any questions about opening IIC individual account, please email aiahkar-ia@aia.com.

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Thank You

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