

Flowchart for Insurance Marketing Firm

Following are the steps which have to followed to register for Online Training , Online Examination and Registration of Insurance Marketing Firm on IRDAI Portal by Insurance Marketing Firm Companies.

STEPS:

Please note that there are three portals

- 1) Training Portal - www.insuranceinstituteofindia.com
- 2) Examination Portal - www.iiixams.org/
- 3) IRDAI IMF Portal -> <https://www.irdai.gov.in>

Step 0 :

To create Company profile of www.insuranceinstituteofindia.com (Training Portal Link) and www.iiixams.org Portal (Examination Portal Link), , please use following link [Applicable to Companies/Corporates]

<https://www.insuranceinstituteofindia.com/web/guest/to-create-company-profile;jsessionid=2448B6ECDFEE42EDB37CD571A93E7F6>

Step 1 : To Update GSTIN

To update GSTIN, please visit website www.insuranceinstituteofindia.com

Login – www.insuranceinstituteofindia.com(Using Login ID and Password of Training Portal Link)

Go to **IRDAI Examinations**-> Update GSTIN

The system will ask ->**Are you registered under GSTIN ?** -> Yes / No

If **Answer is Yes** – You can enter GSTIN for all the states of your company. But you have to keep one **default GSTIN**.

Bulk Payment for Training -> While making the payment by Insurance Marketing Firm Company, the system will show you all the states for which GSTIN is entered by you. You can select GSTIN state as desired by you so that you can get input for selected GSTIN state.

The Insurance Marketing Firm Company can get the input for the payment which is done by individual candidates as GSTIN of company will be printed on the receipt of the individual candidate.

Single Payment by Candidates->While making the payment by Individuals of the Insurance Marketing Firm Company. The system will show the default GSTIN selected by Insurance Marketing Firm Company on the payment receipt of individual agent.

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If **Answer is No** – If your company is not registered under GSTIN, in that case, please select “No” answer for the question “**Are you registered under GSTIN ?** → Yes / No”

Step 2: Create URN (Unique Registration Number)

After receiving ID and password of Examination Portal Link - www.iiexams.org portal, you can create URN of single candidate using “Training Registration Form” option or you can use Bulk upload format to generate URN for multiple candidates.

Step 3 : To make the payment for Training

To register for Online Training, go to www.insuranceinstituteofindia.com -> under <<IRDAI Examinations>> menu .

There are two options to make the payment

Single Payment – Individual Candidate can make the payment

- Single Registration for online training (This option is for the candidate so that candidate can make the payment for online training) -> As soon as the payment is done, candidate will receive ID and password by SMS and Email. So that candidate can start the online training.

The link which is given is for your reference.

<https://www.insuranceinstituteofindia.com/web/guest/single-registration-other-than-corporate>

Bulk Payment – Company can make the payment for multiple candidates by two payment modes 1) Online Payment i.e. Debit Card/Credit Card/Internet banking 2) Web Wallet

- After log in www.insuranceinstituteofindia.com, then company can upload bulk file of URN and can make the payment for multiple candidates by online/ webwallet mode for URNs which are uploaded by company. As soon as the payment is done, candidate will receive ID and password by SMS/Email. So that candidate can start the online training.

Please refer the following link for help manuals for online and webwallet payment mode.

- **Online Payment mode for Online Training** - > Please refer following link for help manual-> <https://www.insuranceinstituteofindia.com/documents/10156/ca6c79f1-ddf3-400a-9227-0a164446c4c9>
- **Web Wallet Payment mode for online Training** - > Please refer following link for help manual

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To start the web wallet, please refer www.insuranceinstituteofindia.com->IRDAI Examinations-> Web Wallet

Please refer the following link for help manual -><https://www.insuranceinstituteofindia.com/documents/10156/e07ffbc7-d41d-4fe6-a1e6-22489a352ab3?jsessionid=2F5E43F448978FCA4D57B8DB89FE8EBB>

- **Web Wallet Payment mode for online Examination** - > Please mail to tech.support@nseit.com

Step 4 : Training Completion Certificate

To register for examination, it is mandatory to generate training completion certificate on the website www.insuranceinstituteofindia.com under IRDAI Examinations menu.

<https://www.insuranceinstituteofindia.com/web/guest/training-completion-certificate1>

Step 5 :Examination Registration –Procedure

To register for examination, it is mandatory to generate training completion certificate on the website www.insuranceinstituteofindia.com under IRDAI Examinations menu.

<https://www.insuranceinstituteofindia.com/web/guest/training-completion-certificate1?jsessionid=2F5E43F448978FCA4D57B8DB89FE8EBB>

Once the candidate has completed the required training from III Training Portal (www.insuranceinstituteofindia.com- liiindia.org.in OR iii.learningmate.com) then the Insurance Marketing Firm Company has to register the candidate for the examination.

For examination registration, Batch ID has to be generated on www.iiiexams.org portal by the Corporates/Companies. No individual candidate can create batch ID/Transaction ID for examination registration.

To create batch ID, corporate can go to www.iiiexams.org , under <<Examination Registration>> Tab, please select applicant date of URN and preferred examination date and create batch ID.

Follow the below steps for exam registration.

To create a Batch ID, follow the below steps.

1. Select the date in Application from date and to date on which date the URN was created. [To find Application Date -> Care Site -> IRDA URN Details-> Applicant Details Created On (Application Date)]
2. Then click on submit then after it will populate the record which was created in the given application date range and for which the training is completed and valid.
3. Now enter the preferred exam date in 'OnOrAfter' column in dd MMM YYYY format e.g.

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24 Oct 2016.

4. Now click the record for which you want to register for exam and you have entered the preferred exam date and click on save to generate Batch ID.

5. Once the batch ID is generated then no modification is allowed.

6. After generation of Batch ID you can make the payment of the Batch ID/transaction ID through the given URL:

<http://nseitexams.com/OnlinePayment/paymentRequest.jsp>

7. Payment for the Batch ID/transaction ID can be made after 24 hours or next day of the Batch creation date.

Examination Registration Screens

Click on the “Examination Registration” option under the login of Insurance Marketing Firm Company on www.iiiexams.org portal.

- 1) Select the Application from date and to date on which the URN was created. List of the URN will be display in the below window if available in the given date range.

The screenshot shows the 'Examination Registration' page for a Corporate Agent User. The page includes a navigation menu on the left with options like Profile, Care Site, Examination, Reports, and Corporate Branch. The main content area has a header for 'Examination Registration' with links for bulk upload and download template. Below this is a form with fields for 'Application From Date' (06 Sep 2017), 'To Date' (06 Sep 2017), 'Exam Body' (Insurance Institute of India), and 'Exam Center' (All). A 'Submit' button is at the bottom of the form.

- 2) Once it displays the list of URN at the same time it will show the batch mode and scheduling mode.

The screenshot shows the 'Examination Registration' page for a Corporate Designated Person. The page includes a navigation menu on the left with options like Profile, Administration, Licensing, Care Site, Examination, Reports, and Corporate Branch. The main content area has a header for 'Examination Registration' with links for bulk upload and download template. Below this is a form with fields for 'Payment Mode' (Online Paymer), 'Batch Mode' (Bulk Batch, Single Candidate Batch), and 'Scheduling Mode' (Auto Scheduling, Self Scheduling). There is also a 'Remarks' text area and a table for 'Trained Applicants' with columns for Applicant Name, URN, Enrollment No., ATI Center, Training Hours, and Training End Date.

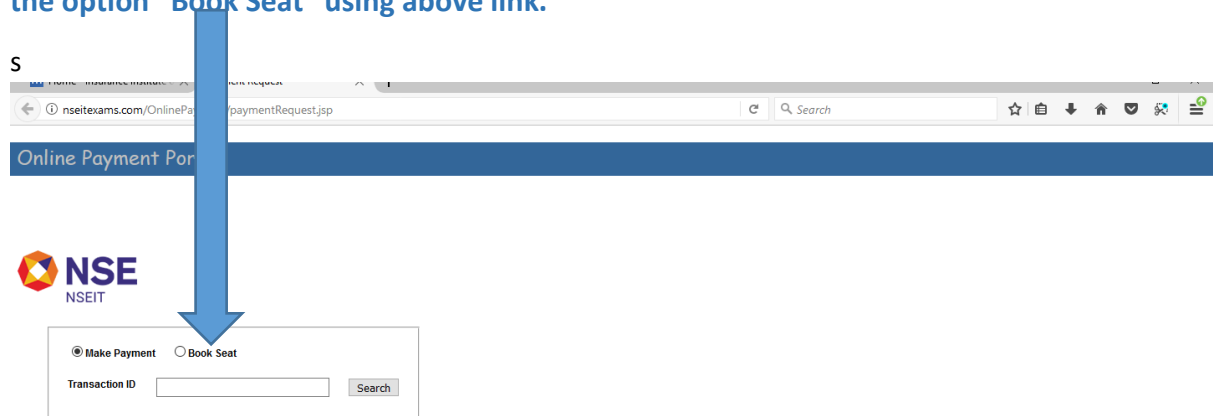
There are combinations of ‘Batch Mode’ and ‘Scheduling mode’ is given For Insurance Marketing Firm:

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Payment Mode	Batch Mode	Scheduling Mode	Meaning
Online Payment	Bulk	Auto	Single batch ID will be created and examination slot will be provided by NSEIT
	Bulk	Self	Single batch ID will be created and examination slot has to be selected by the candidate
	Single	Auto	URN = Batch ID will be created and examination slot will be given by NSEIT
	Single	Self	URN = Batch ID will be created and examination slot has to be selected by the candidate

Self Scheduling

In case Scheduling mode is “Self Scheduling”, then after making the payment , you can use the option “Book Seat” using above link.

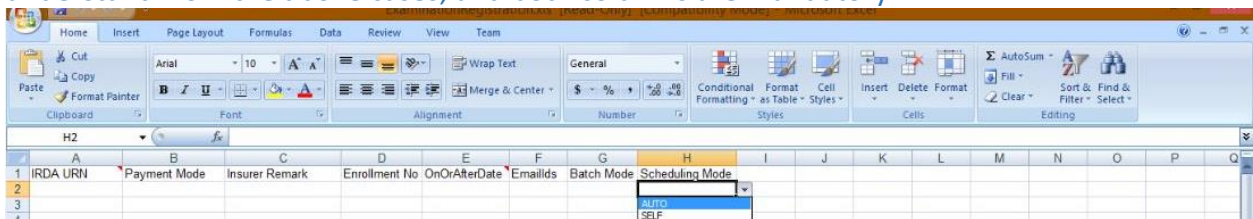


Instructions:

1. Candidate can make a payment next day after confirmed for examination.
2. For any payment related query, insurance company/candidate needs to contact the respective bank.
3. Please do not close the browser till you get an appropriate message (Payment Successful/Unsuccessful) and note down the Customer Reference number.
4. In case the message shows as payment is "Unsuccessful" and amount is debited from bank account then kindly contact your respective bank.
5. Exam fees once paid will not be refunded under any circumstances once scheduled, even if candidate chooses to remain absent for the examination.
6. **In case of payment confirmation not received, transaction amount will be refunded back within 3-4 working days.**
7. Our helpline number is 022-42706500 (timing 9:30 am to 5:30 pm). You may also send an email to iiaexam_reg@nseit.com

Below is the screen shot of new Examination Registration template for Bulk upload, which has the same option of batch and scheduling in the last two columns respectively.

These option are also has the same functionality as par the payment mode as we have understand from the above cases, and both columns are mandatory.



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- **Step 6 : Venue and Examination Slot**

The venue & Examination Slot details will be informed to the candidate by SMS.

- **Step 7 : Admission Card and Score Card**

You can download Hallticket (Admission Card) and Score Card using following link.

<http://www.iiiexams.org/PublicAccess/PubPrintHallTicket.aspx>

- **Step 8 :**

After passing the examination, you can download examination passing certificate on www.insuranceinstituteofindia.com using following link :

<https://www.insuranceinstituteofindia.com/web/guest/examination-passing-certificate>

Step 9 :

You can email/contact to following email IDs / contact Nos as per query-**Contact details**

Portal	Query	Email IDs	Telephone Nos
www.insuranceinstituteofindia.com and iiiexams.org	Corporate /Company Profile	reg.exams@iii.org.in	022-26544298/208/220/257
www.iiexams.org	Bulk upload file – URN Generation	Tech.support@nseit.com	022-42706500
www.iiexams.org	Training Registration Form	Tech.support@nseit.com	022-42706500
www.insuranceinstituteofindia.com	Online training (ID and Password, Online Payment for Training etc)	reg.exams@iii.org.in	022-26544298/208/220/257
https://iii.learningmate.com	Web/Internet Based Training - >Timer not working/No courses found	Support.lx@learningmate.com	
https://iiiindia.org.in	Web + Mobile App based Training	iiiteam@ambrosiainfotech.com	
www.iiexams.org	Examination Registration, Hall Ticket, Score Card/Online Payment for examination	Exams_schedule@nseit.com	022-42547510,022-42547458
http://imf.irda.gov.in/	Insurance Marketing Firm on IRDAI Portal	Imf@irda.gov.in	040-20204000, 040-20204470 (3 PM to 5 PM)

Regarding Training and Examination, if any query is not resolved, please feel free to write the mail to reg.exams@iii.org.in