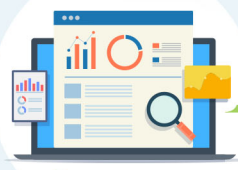


View **Application Status** and **Records** in Real Time

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View **Application Status** and **Past Records**



Application Status

The screenshot displays the 'Application Status' page with the following details:

- Application for New Policy:** Application No. 0101234567, Insured Chan Tai Man, Received Date 2021/11/12, Name of Basic Plan (C208)Superior Wealth Plus Whole Life Plan. Status: Process Underway.
- Application for Claims (Hospitalisation Benefit):** Policy No. 8100000000, Insured Chan Tai Man, Received Date 2021/11/09, Name of Basic Plan (C024)Time Lady Protection Plan, Claim No. F9837323. Status: Process Underway - We have applied to obtain the required medical document...
- Application for Change of Policy (Pre-Application/Application for Policy Maturity Benefit):** Policy No. 8100000002, Insured Chan Tai Man, Received Date 2021/11/08, Name of Basic Plan (C057)Supreme Wealth (10-Year) Whole Life Plan, Claim No. 2021810100336748223. Status: Follow-up Letter Issued.

A timeline on the right shows the following steps:

- Application Received (Via Customer Portal) - 2021/11/08 16:58:03
- Under Review - 2021/11/09 17:38:06 (3 working days)
- Follow-up Letter Issued - 2021/11/10 12:06:08
- Reply Received and Under Review

1. After logging into the Individual Customer Portal, select "Application Status" from the main manual.
2. On the "Application Status" page, you may check (i) the Application for New Policy and Application for Change of Policy which have been submitted by filling out paper forms, and (ii) the status of the Application for Claim submitted online or by filling out paper forms. You may also sort or filter records by policy no., received date of application or application type.
3. Check the application and approval progress for the submitted Pre-Application/Application for Policy Maturity Benefit, Policy Value Withdrawal and Change of Policy Ownership Transfer in real-time.
4. Click "Follow-up Letter" (if any) to check the required follow-up details.

Note

- Only Received Date of Applications on or after 1 May 2018 are shown.
- You may also select "My Policy" from the main manual, and click policy no. with status of "Application Underway" in the policy list to enter the "Application Status" page and know the status of insurance application.

Past Records

The screenshot displays the 'Past Records' interface. At the top, there are filters for 'Received Date' (set to 'Last 6 months') and 'Application Type' (set to 'All'). Below the filters is a table with 12 records. The table columns are 'Application Type', 'Policy No.', 'Application Details', and 'Received Date (YYYY/MM/DD)'. The first record is 'Application for Claims (Hospitalisation Benefit (inpatient/hospital income))' with Policy No. 8100000000 and Claim No. -202123111765123456-1, received on 2021/11/12. The second record is 'Application for Claims (Waiver of Premium)' with Policy No. 8100000001 and Claim No. -202123111765123434-, received on 2021/11/10. The third and fourth records are 'Application for Change of Policy (Pre-Application/Application for Policy Maturity Benefit)' with Policy Nos. 8100000002 and 8100000003, both received on 2021/11/09. A sidebar on the left shows the 'Past Records' menu item highlighted with a red circle '1'. A red circle '2' highlights the first row of the table. A red circle '3' highlights the process flow diagram on the left, which shows three steps: 'Application Received (Paper-based Form)', 'Under Review', and 'Application Process Complete'. A red circle '4' highlights the 'Download Endorsement' button in the fourth record. At the bottom of the table, a case number '2021810100336748223' is shown with a detailed timeline of events: 'Application Received (Paper-based Form)' on 2021/11/08 at 16:58:03, 'Under Review' on 2021/11/09 at 17:38:06, and 'Application Process Complete' on 2021/11/12 at 09:23:01.

1. After logging into the Individual Customer Portal, select "Past Records" from the main manual.
2. On "Past Records" page, you may check records of all processed Applications for Change of Policy and Application for Claims submitted online or by filling out paper forms. You may also sort or filter records by policy no., received date of application or application type.
3. The process points and approval progress for the completed Pre-Application/Application for Policy Maturity Benefit, Policy Value Withdrawal or Change of Policy Ownership Transfer can be checked in real-time.
4. Click the download button (if any) in "Application Details" section to know status of the Application for Change of Policy and the Application for Claim.

Note:

Only Received Date of Applications on or after 1 May 2018 are shown.