

Check Policy Status and Coverage Details Anytime & Anywhere

In the Palm of Your Hand!

Check Coverage Details

Please scan the QR code to login Individual Customer Portal
cs.chinalife.com.hk

My Policy

1 Policy Status

2 Type of Inforce Coverage

3 Inforce (Premiums Paying)

Application No.	Policy Date (YYYY/MM/DD)	Insured	Modal Premium	Premium Due Date (YYYY/MM/DD)
0103455678		Chan Tai Man	HKD 83,000.00	2017/10/04

Policy No.	Policy Date (YYYY/MM/DD)	Insured	Modal Premium	Premium Due Date (YYYY/MM/DD)	Paying Premium by
8100000002	2010/04/23	Chan Tai Man	HKD 1,800.00	2018/04/23	Automatic Premium Loan

Policy No.	Policy Date (YYYY/MM/DD)	Insured	Modal Premium	Premium Due Date (YYYY/MM/DD)
8100256733	2009/05/23	Chan Tai Man	HKD 23,000.00	2017/10/04

Main Manual

After logging into the Individual Customer Portal, the drop-down menu offers various functions, including but not limited to "My Policy", "E-Change", "E-Claim", "Application Status", "Past Records" and "E-Notice".

Display Section

Functions include "Message Notification", "Change Password", "Select Language", "Select Branch" and "Logout".

Policy Overview

1. Click a colour in the "Policy Status" circle to view details of policies under the corresponding status.
2. In the "Type of Inforce Coverage" section, you may click a colored image to check the types of coverage provided by all of your inforce policies, including Life Protection, Savings, Investment Linked, Critical Illness, Medical and Accident/Disability Protection.
3. Click the policy no. with status of "Inforce (Premiums Paying)" or "Inforce (Paid-up)" in the policy list to enter the "Policy Details" page and know about the inforce policy contents, or click the application no. with status of "Application Underway" to enter the "Application Status" page and know the status of insurance application.

[^]If your application for new policy has not been approved for any of various reasons, the application will not continue to be shown in the Customer Portal account.

Policy Details

Policy No. 8103566136
Inforce (Premiums Paying)
Download Policy Summary

Basic Information

Policyholder: **Chan Tai Man** Insured: **Chan Tai Man**

Insurance Intermediary Information

Name: **Ms. Cheung Mei Lai (Code : 812670)** Telephone No.: **98764321**

Beneficiary Information

Beneficiary: **Chan Siu Ming** Share %: **100%**

Coverage

Basic Plan	Sum Assured / Basic Amount (if applicable)	Policy Date / Effective Date (YYYY/MM/DD)	Benefit Expiry Date (YYYY/MM/DD)	Premium Expiry Date (YYYY/MM/DD)	Modal Premium
(C206)Superior Wealth Plus Whole Life Plan	HKD120,000.00	2015/08/28	2074/08/28	2020/08/28	HKD2,500.00
(Without premium levy) Modal(Monthly payment) Total Amount					HKD2,500.00

Note(s) : For details, please refer to the policy provisions.

Payment Information

Payment Mode: **Monthly payment**
 Payment Method: **Autopay**
 Premium Due Date (YYYY/MM/DD): **2018/03/28** Premium offset by automatic premium loan

Autopay Status: **Suspended** Apply for Change of Reactivate Autopay Instruction

PPS Bill No.: **2123456789012345** Merchant Code: **9375** Link to PPS

Please click here for details of payment methods

Account Information

As of (YYYY/MM/DD): **2018/05/19**
 Cash Value: **HKD50,923.66**

Policy Deposits: Equal to (a) + (b) + (c) **HKD1,120.91**

Prepay Premiums: **HKD0.00**

Levy Account: **HKD0.00**

Loan: Equal to (d) + (e) + (f) + (g) **HKD28,143.50**

The above account information is for reference only.

Policy Maturity Information

Policy Maturity Date (YYYY/MM/DD): **2074/08/28 (Maturity Payment Instruction is not registered)** E-Change

Remarks : If we have not received your payment instruction before the Policy Maturity Date, we will pay the maturity amount in a crossed cheque.

Payment Records

Period: **Last 3 Transactions** From: to:

Premium Term	Premium Due Date (YYYY/MM/DD)	Payment Mode	Received Date (YYYY/MM/DD)	Premium Amount	Note(s)
3rd Payment Year 7th Installment	2018/02/28	Monthly payment	2018/02/27	HKD1,066.80	Premium offset by automatic premium loan

Policy Summary content options (*Must be displayed)

Basic Information Insurance Intermediary Information Beneficiary Information Coverage

Payment Information Account Information Policy Maturity Information Payment Records

Please select the language of Policy Summary Chinese (Traditional) Chinese (Simplified) English

Reset
Confirm

1. After logging into the Individual Customer Portal, on the "Policy Details" page, you may check policy basic information, information on insurance intermediary, beneficiary, coverage, modal premium, account records, Policy Maturity Information and payment records.

2. Click "Download Policy Summary" to download and print the information shown on the "Policy Details" page.

2a. Select Policy Summary content options or click "Select all" for all content options.

2b. Select Language.

2c. Click "Confirm".

3. You may scroll down the list to check details of other policies.

E-Notice

The screenshot displays the 'E-Notice' interface. On the left sidebar, the 'E-Notice' menu item is highlighted with a red circle and the number '1'. The main content area features a table of notices with the following columns: Policy No., Type of Notice, Issue Date (YYYY/MM/DD), Name of Notice, and Status. The table contains 8 records. The first two rows have 'Unread' buttons, with the second row's button highlighted by a red circle and the number '3'. Above the table, there are filter dropdowns for 'Type of Notice' (set to 'All'), 'Status' (set to 'All'), and 'Issue Date' (set to 'Last 6 months'). A search bar for 'Policy No.' is also present. A red circle with the number '2' highlights the filter dropdowns.

Policy No.	Type of Notice	Issue Date (YYYY/MM/DD)	Name of Notice	Status
810000002	Payment Notice	2018/05/18	Payment Notice	Unread
810000004	Payment Notice	2018/05/17	Direct Debit Collec	Unread
810000003	Payment Notice	2018/05/12	Overdue Payment Notice	Read
810000003	Payment Notice	2018/05/12	Overdue Premium Levy Payment Notice	Read
810000005	Coverage/ Policy Status Notice	2018/05/11	Policy Increase Sum Assured Notice	Read
810000001	Coverage/ Policy Status Notice	2018/05/10	Policy Maturity Notice	Read
810000010	Coverage/ Policy Status Notice	2018/05/09	Notice of Policy Lapsation	Read
810000003	Policy Annual Statement	2018/04/12	Policy Annual Statement	Read

1. After logging into the Individual Customer Portal, select "E-Notice" from the main manual.
2. On "E-Notice" page, you may filter notice by "Type of Notice", "Status", "Issue Date" or policy no. to view e-notice issued in the last 3 years.
3. Click "Search Results" to download e-notice.

E-Policy

Step 1 Select Policy

1

2

1. After logging into the Individual Customer Portal, select "My Policy" from the main manual.
2. Select one of the policies from the policy list to enter the "Policy Details" page.
3. If your selected policy was issued on or after 1 September 2018, you may click on "Please click here" to Step 2.
4. If your selected policy was issued before 1 September 2018, you will be

3

4

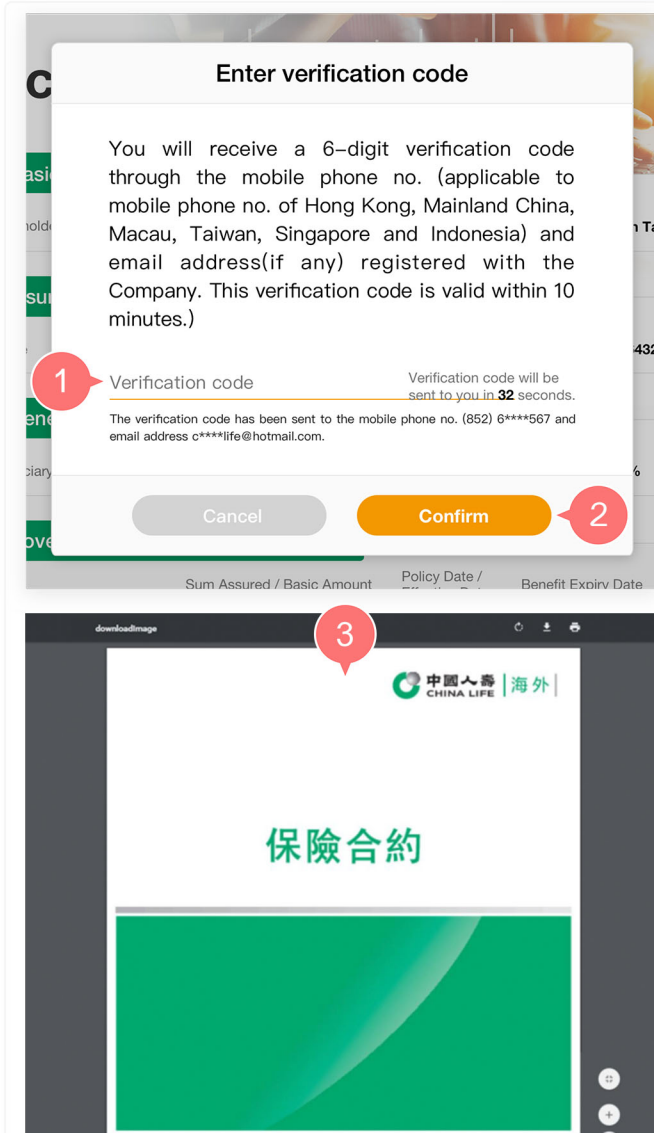
Notice

As the selected policy was issued before 1 September 2018, it is not eligible for using E-Policy service.

Confirm



Step 2 Enter Verification Code



After clicking the button "Please click here", you will receive a 6-digit verification code through the mobile phone no. (applicable to mobile phone no. of Hong Kong, Mainland China, Macau, Taiwan, Singapore or Indonesia) and email address(if any) registered with the Company. This verification code is valid within 10 minutes.

1. Enter the 6-digit verification code
2. Click "Confirm"
3. The new page will display "E-Policy" in PDF format