



## **User Guide**

**--- Travel Insurance ---**

**Version: August 2020**

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## **Part A**

### **Login**

**登入**

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## DO MORE

The QBE Insurance platform has been designed to support your growth by allowing you more flexibility in how you do business and providing valuable analytical insights.

[FOR MORE](#)

1

### Connect with QBE

QBE Insurance platform enables you to do business wherever you are. We give you the choice of connecting with us on the move via your mobile or tablet devices and from your office.



### Get Started

 Remember my username[LOGIN](#)[Forgot Password?](#)

2

3

4

#### 1. Login with **Email Address**

利用電郵地址登入

#### 2. Key in **Password**

輸入密碼

#### 3. [LOGIN](#)

#### 4. If you forget your password, please **“Forgot Password”**

假如您忘記密碼，請  **“Forgot Password”**

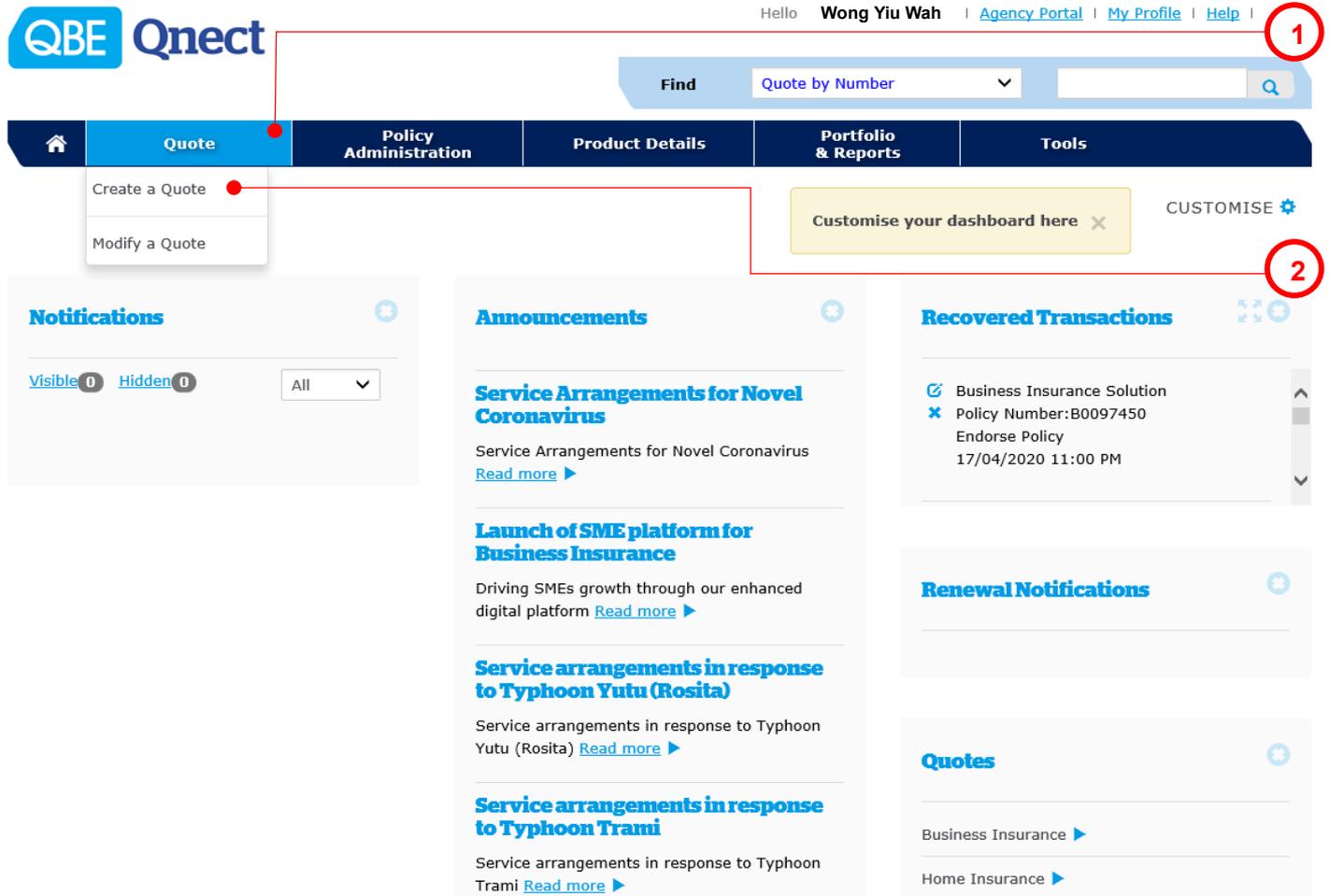
## **Part B**

### **Create Quote**

### **建立報價**

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- Ms. Wong Lai Chun (D987654(3))
- DOB: 01 January 1980
- Trip: Single Trip (1 August 2020 to 7 August 2020)
- Major Destination: Japan
- Plan: Premier
- Plan Type: Individual
- Number of Person: 1
- Email Address: wonglaichun@email.com
- Mobile Number: 92233445
- Address: Unit 610, 6/F, Ching Long Building, 321 Wanchai Road, Wanchai, Hong Kong



The screenshot shows the Qnect user interface. At the top right, the user is logged in as 'Wong Yiu Wah' with links for 'Agency Portal', 'My Profile', and 'Help'. A search bar is present with 'Quote by Number' selected. The main navigation menu includes 'Quote', 'Policy Administration', 'Product Details', 'Portfolio & Reports', and 'Tools'. The 'Quote' menu is expanded, showing 'Create a Quote' and 'Modify a Quote'. A 'Customise your dashboard here' button is also visible. The dashboard content includes sections for 'Notifications', 'Announcements', 'Recovered Transactions', 'Renewal Notifications', and 'Quotes'. Red circles '1' and '2' are overlaid on the image to indicate the steps described in the text below.

1. Choose **“Quote”** from the main menu  
從主頁面選單中，選擇 **“Quote”**
2. Select **“Create a Quote”**  
選擇 **“Create a Quote”**

**New Quote**

To obtain a new quote, choose a policy type, then click **Create Quote**.

**Product Type\***

**Account Number\***

**Inception Date\***

**Expiry Date\***

**Product Type Selection:**  
Home Insurance  
Motor Vehicle Insurance  
Personal Accident Insurance  
Travel Insurance

**Calendar 1 (Inception Date):** Aug 2020. Selected date: 01/08/2020.

**Calendar 2 (Expiry Date):** Aug 2020. Selected date: 07/08/2020.

3. Select **“Travel Insurance”** from **“Product Type”**  
從 **“Product Type”** 選項中選擇 **“Travel Insurance”**
4. Select **“Inception Date”**  
選擇 **“Inception Date”**
5. Select **“Expiry Date”**  
選擇 **“Expiry Date”**
6.

## Travel Insurance

### Insurance Details

Account **Wong Yiu Wah**  
Inception Date\* 01/08/2020  
Expiry Date\*   
Duration (days)

### Cover Type

- Single Trip
- Annual Multi Trip

7. Select “Cover Type”

選擇 “Cover Type”

8. 

## Travel Insurance

Travel

### Travel Details

**Major Destination\***

**Cover Type**

**One Way Cover\***

**Plan Type\***

**Duration (days)**

**No. of Persons\***

France

Germany

India / Sri Lanka

Indonesia

Italy

Japan

Korea

Laos

Macau

Malaysia

Individual

### Insured Persons

**Not required for Quick Quotes. Input only for Policy Issuance**

**Surname / Given name\***

**Date of Birth (DD/MM/YYYY)\***

**HK ID Number**

Add / Clear

Surname/Given name	Date of Birth	ID Number
<a href="#">WONG LAI CHUN</a>	01/01/1980	D987654(3)

**Number of Insured Person(s):**  
Total Number of People: 1

### Select Plan

**Plan\***

Economy

Superior

Premier

### Top Ups

*We have suggested some Top Up covers for this trip. You may add or de-select any Top Ups, as required*

Golfing

Snow Sports

Cruise Voyage

Rental Vehicle Extension

Special Events

Trip Cancellation and Curtailment Expansion

Clauses (0)

**CALCULATE PREMIUM** >

9. Select “Major Destination”  
選擇 “Major Destination”
10. Select “Plan Type”  
選擇 “Plan Type”
11. Input “No. of Persons”  
輸入 “No. of Persons”

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- Input the details of the “Insured Persons”, including “Surname / Given Name”, “Date of Birth” and “HK ID Number”

輸入 “Insured Persons” 的資料

包括 “Surname / Given Name”、 “Date of Birth” 及 “HK ID Number”

- [Add](#)

If there are more than one “Insured Person”, please provide the details of each “Insured Person” with reference to Step 12 and 13 above

如果有多於一個 “Insured Person”，請參考以上步驟 12 及 13 去提供每位 “Insured Person” 的資料

- Details of the “Insured Persons” will be shown

會顯示 “Insured Persons” 的資料

- Select “Plan”

選擇 “Plan”

Can adjust the commission rate to make the quote more competitive  
可調整佣金百分比令報價更具競爭力

- Select “Top Ups”, as required

如有需要，可選擇 “Top Ups”

- [CALCULATE PREMIUM >](#)

- [Commission Rate](#) to adjust the

commission rate

- [Commission Rate](#) 去調整佣金百分比

- Input new commission rate

輸入新佣金百分比

- [CALCULATE](#)

- [SAVE](#)

- [OK](#)

- [NEXT >](#)

Premium Breakdown:	Annual Premium	Premium Due	Levy	Total Due	Commission Rate	Commission Amount
Economy	\$211.00	\$211.00	\$0.18	\$211.18	35.0%	\$73.85
Superior	\$329.00	\$329.00	\$0.28	\$329.28	35.0%	\$115.15
Premier	\$536.00	\$536.00	\$0.46	\$536.46	35.0%	\$187.60
<b>Total Premium</b>					<b>\$536.46</b>	HKD

- [NEXT >](#)

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### Customer Details

SEARCH FOR EXISTING CUSTOMER

**Customer Type\***

**Name\***

**ID Number\***

**Title**

**Gender\***

**Date of Birth**

**Nationality**

**Home Telephone Number**

**Business Telephone Number**

**Mobile Number**

**Fax Number**

**Email Address**

**Unit / Floor Number**

**Building Number and Name**

**Street Number and Name\***

**District**

**Country\***

### Search Customer

**Customer Type**

**Search By**

**Name**

Also print documents in

**Total Premium 536.46 HKD**

24. If Ms. Wong is an existing customer,  to retrieve her details

如果黃小姐已是現有客戶，  取得她的資料

25.

26. If Ms. Wong is a new customer, enter her information in the fields provided (\* is compulsory)

如果黃小姐是新客戶，按表單內容輸入她的資料 (\* 必須填寫)

27. Please select “**Chinese**” if you want both English and Chinese policy documents

如果需要英文及中文保單文件，請選擇 “**Chinese**”

28.

## Part C

### Issue Policy

### 簽發保單

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Three options for **“Make Payment”**, namely **“Customer Payment”**, **“Pay Now”** and **“Issue Policy”**

**“Make Payment”** 有三種模式以供選擇，包括 **“Customer Payment”**、**“Pay Now”** 及 **“Issue Policy”**

- If you select **“Customer Payment”**, please refer to Step 1 to Step 16

如果您選擇 **“Customer Payment”**，請參考步驟 1 至步驟 16

- If you select **“Pay Now”**, please refer to Step 17 to Step 35

如果您選擇 **“Pay Now”**，請參考步驟 17 至步驟 35

- If you select **“Issue Policy”**, please refer to Step 36 to Step 49

如果您選擇 **“Issue Policy”**，請參考步驟 36 至步驟 49

## “Make Payment” by “Customer Payment”

Also print documents in Chinese Customer Payment

Total Premium **5.** Pay Now Issue Policy

**SAVE PENDING** **MAKE PAYMENT**

1. Customer selects “Customer Payment”

客戶選擇 “Customer Payment”

2. Verify the “Email Address” and “Mobile Number” of the customer  
核對客戶之 “Email Address” 及 “Mobile Number”

3. **SUBMIT**

**Customer Payment**

Email Address\*

Verify Email Address\*

Country Code

Mobile Number

[+](#)

Please note that an SMS will be sent to the customer and/or any other mobile numbers captured using a third party provider with details provided in accordance with the data privacy policy outlined in Qnect used in your country

**CANCEL** **SUBMIT**

## Policy

**Insurance Details**

**Policy No:** T0891161 **Policy Status:** Pending New Business

**Policy Type:** Travel Insurance (PTR) **Policy of Insurance:** 01/08/2020 to 07/08/2020

**Insured:** WONG LAI CHUN **Wording:** UWD.PTRVS.E.V4.1807

**Address:** UNIT 610 6/F CHING HONG BUILDING 321  
WANCHAI ROAD WANCHAI

**Agent:** Wong Yiu Wah

[Risks](#) [Transaction History](#) [Documents](#)

Section	Risk	Location / Type of Business	Commence	Terminated
Travel	<a href="#">001</a>	HONG KONG	01/08/2020	

4. The “Policy Status” will show “Pending New Business”

“Policy Status” 會顯示 “Pending New Business”

- The customer will receive a “Payment Request Email” and can use the “Make Payment” link enclosed to settle the premium

客戶收到 “Payment Request Email” 後，可利用隨件附上之 “Make Payment” 連結去繳付保費

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## Qnect - Payment request for T0891161

QnectAsia@qbe.com

To wonglaichun@email.com

Dear WONG LAI CHUN,

5

Thank you for insuring with QBE.

Your travel policy has been successfully processed for the period from 1 Aug 2020 to 7 Aug 2020.

To ensure the validity of your insurance coverage, please click on the 'Make Payment' link below to make payment. This link will be valid for the next 5 days (upon receiving this email) or up to and inclusive of the date of your departure, whichever ends earlier. Please ensure you complete the premium payment process before you leave for your destination, otherwise, your insurance cover will not be in force.

Should you have any queries, please do not hesitate to contact your intermediary Wong Yiu Wah.

[Make Payment >](#)



5. Customer receives the “**Payment Request Email**”  
客戶收到 “**Payment Request Email**”

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## Travel Insurance Payment - Policy Summary - T0891161

### Policy Summary

#### Important Notice

The Insured Person/s :

- will not be travelling contrary to the advice of a medical practitioner or for the purpose of obtaining medical treatment
- is/are in good health and free from any physical impairment, infirmity, disability or deformity
- is/are accompanied by parents or guardian if they are under 12 years of age
- agree(s) that the Policy is non-refundable (Single Trip Policy) and non-transferrable once the Policy is issued
- agree(s) that the maximum duration is 182 days for Single Trip Policy and 90 days per trip for Annual Multi-Trip.
- accept(s) the terms, exclusions and conditions as set out in the Policy
- has/ have read and consented to the [Personal information Collection Statement](#)

I agree with the declarations and confirm the details contained in this page are true and correct.

#### Insured

**Customer No** 04729116  
**Full Name** WONG LAI CHUN

#### Travel Details

<b>Major Destination</b>	Japan	<b>Policy Type</b>	Single Trip	<b>Return Trip</b>
<b>Inception Date</b>	01/08/2020	<b>Expiry Date</b>	07/08/2020	
<b>Plan Type</b>	Single Trip	<b>No. of Persons</b>	1	<b>7 days</b>

#### Insured Person(s)

WONG LAI CHUN born 01/01/1980

If there are any errors or omission, please click on 'Abandon' and contact your intermediary. Otherwise please make the payment.

Travel Insurance Policy - Travelon( Premier )

Premium HKD 536.46

**MAKE PAYMENT** >



6. Customer reviews the “Importance Notice” under the “Policy Summary”

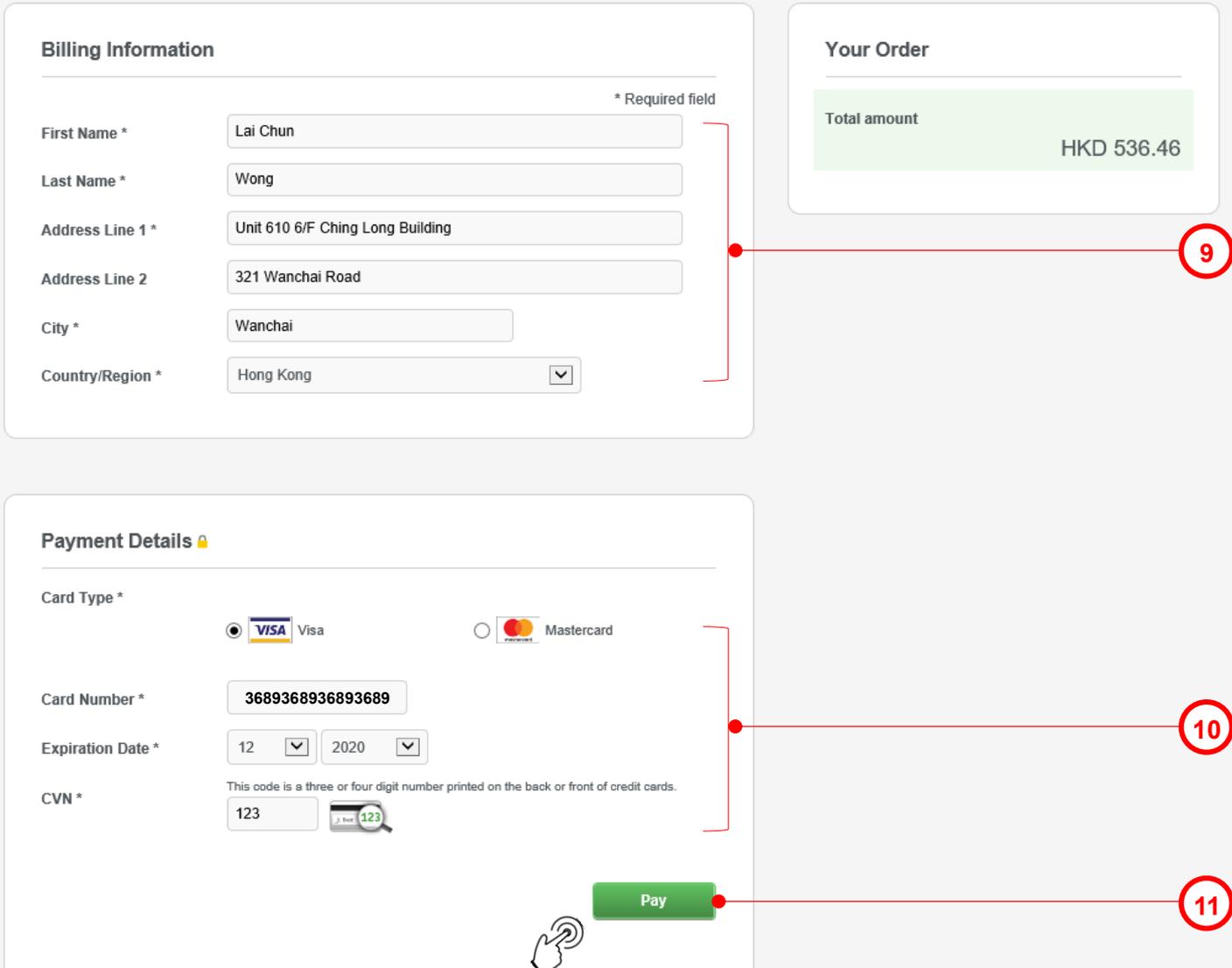
客戶檢閱 “Policy Summary” 內之 “Importance Notice”

7. Customer agrees to “Policy Summary”, then checks the box

客戶同意 “Policy Summary” 內容，然後在方格內打勾

8. **MAKE PAYMENT** >

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**Billing Information**

\* Required field

First Name \*

Last Name \*

Address Line 1 \*

Address Line 2

City \*

Country/Region \*

**Your Order**

Total amount **HKD 536.46**

**Payment Details** 🔒

Card Type \*   Visa   Mastercard

Card Number \*

Expiration Date \*

CVN \*  

9. Customer inputs the **“Billing Information”**

客戶輸入 **“Billing Information”**

10. Customer inputs the **“Payment Details”**

客戶輸入 **“Payment Details”**

11. 

## Payment Confirmation

### Payment Confirmation

Thank you for insuring with QBE.  
Your policy has been issued. Policy documents will be sent to your contact email address in 24 hours.  
You may print payment confirmation details for your reference.

#### Policy Details

Policy Number	<b>T0891161-PTR</b>
Insured	<b>WONG LAI CHUN</b>
Period of Insurance	<b>From 1 Aug 2020</b> <b>To 7 Aug 2020</b>
Receipt number	<b>5936808056536643103001</b>
Amount	<b>HKD 536.46</b>

CLOSE

12

12.



CLOSE

QBE Travel Policy No.: HKSI-T0891161-PTR. Period: 01/08/20-07/08/20. 24-hr helpline: [+852 2862 0138](tel:+85228620138). QBE Claims: [claims.qbe.com/hk/travel](https://claims.qbe.com/hk/travel). Thank you!  
昆士蘭聯保旅遊保險保單號碼：HKSI-T0891161-PTR。日期：01/08/20-07/08/20。24小時緊急援助熱線：[+852 2862 0138](tel:+85228620138)。網上索賠：[claims.qbe.com/hk/travel](https://claims.qbe.com/hk/travel)。謝謝！

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13. Customer receives the SMS with QBE Travel Policy No. and 24-hr Helpline No.

客戶收到一個 SMS，內有 QBE Travel Policy No. and 24-hr Helpline No.

14. Customer receives the “**Payment Receipt**” email

客戶收到 “**Payment Receipt**” 電郵

15. Agent receives the “**Payment Receipt**” email

Agent 收到 “**Payment Receipt**” 電郵

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## Qnect - Travel Policy T0891161 Payment Receipt - WONG LAI CHUN

QnectAsia@qbe.com  
To wonglaichun@email.com

Thank you for insuring with QBE.

Your policy has been issued. Policy documents will be sent to your contact email address in 24 hours.  
You may print policy confirmation details for your reference.

### Policy Details

Policy Number : T0891161 - PTR  
Insured : WONG LAI CHUN  
Period of Insurance : From: 1 Aug 2020 To: 7 Aug 2020  
Payment Amount : HKD 536.46  
Receipt Number : 5936808056536643103001

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Travel insurance claims are now easier and faster with QBE Claims [claims.qbe.com/hk/travel](https://claims.qbe.com/hk/travel). From January 2019, only online submissions on the QBE Claims will be accepted.

### QBE Claims Servicing Pledge

Claims Submission Acknowledgment Email – 1 working day  
Claims Decision (approval / declinature)\* – 5 working day  
Claims Payment (cheque / bank transfer)\* – 5 working day  
\* From the receipt of all required claims documents

Have a safe trip.

Made possible



## Qnect - Travel Insurance Policy T0891161 Payment Receipt - WONG LAI CHUN

QnectAsia@qbe.com  
To Wong Yiu Wah

Dear Wong Yiu Wah,

Please note that the insured (WONG LAI CHUN) online credit card payment for Policy T0891161 with payment amount HKD 536.46 was successful.

The policy documents will be sent to the insured under a separate email shortly.

If you have any further queries, please contact your designated account handler.

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Made possible



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## Qnect - Travel Insurance T0891161 Policy Document

QnectAsia@qbe.com

To wonglaichun@email.com

 Attached file: Summary of Benefits-ASIA_17816297.pdf 249 KB	 Attached file: Schedule - Client Copy-ASIA_17816285.pdf 66 KB
 Attached file: Receipt-ASIA_17816284.pdf 37 KB	 Attached file: Policy Wording (CHINESE)-ASIA_17816296.pdf 1 MB
 Attached file: Outbound Travel Alert-ASIA-OTALERT_CHINESE.pdf 194 KB	 Attached file: Policy Wording-ASIA_17816295.pdf 940 KB
 Attached file: Summary of Benefits (CHINESE)-ASIA_17816298.pdf 432 KB	 Attached file: 24-hr Worldwide Emergency Assistance Cards-ASIA_17816299.pdf 22 KB
 Attached file: Schedule - Client Copy (CHINESE)-ASIA_17816286.pdf 84 KB	 Attached file: Outbound Travel Alert-ASIA-OTALERT.pdf 147 KB
 Attached file: 24-hr Worldwide Emergency Assistance Cards (CHINESE)-ASIA_17816300.pdf 37 KB	

Dear WONG LAI CHUN,

16

Thank you for insuring with QBE Insurance. We advise that you read the policy prior to your trip and carry with you the QBE 24-Hour Worldwide Emergency Assistance Card as attached which contains the necessary emergency number.

If you have any enquiries on the coverage, Policy Schedule and Policy Wording, please do not hesitate to contact your agent – Wong Yiu Wah.

We, at QBE wish you a safe and enjoyable journey.

Travel insurance claims are now easier and faster with QBE Claims [claims.qbe.com/hk/travel](https://claims.qbe.com/hk/travel). From January 2019, only online submissions on the QBE Claims will be accepted.

### QBE Claims Servicing Pledge

Claims Submission Acknowledgment Email – 1 working day

Claims Decision (approval / declinature)\* – 5 working day

Claims Payment (cheque / bank transfer)\* – 5 working day

\* From the receipt of all required claims documents

Have a safe trip.



16. Customer receives the “Policy Document” email

客戶收到 “Policy Document” 電郵

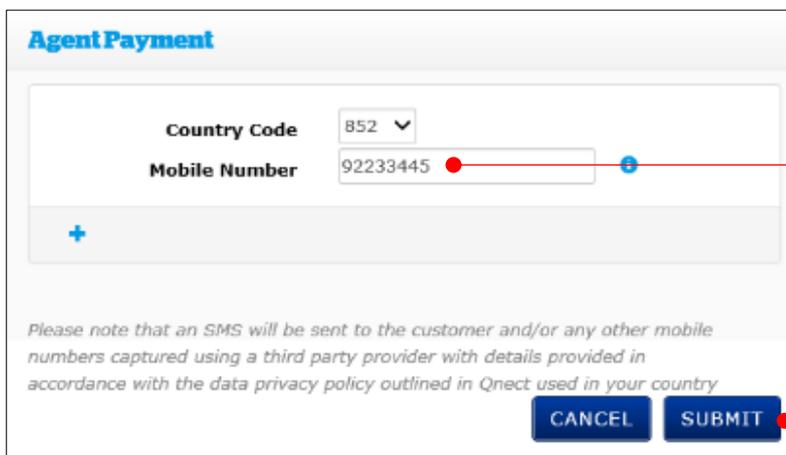
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## “Make Payment” by “Pay Now”



17. Customer selects “Pay Now”

客戶選擇 “Pay Now”



18. Verify the Mobile Number of the customer

核對客戶之 Mobile Number

19.  

**Billing Information**

\* Required field

First Name \*

Last Name \*

Address Line 1 \*

Address Line 2

City \*

Country/Region \*

**Payment Details**

Card Type \*  Visa  Mastercard

Card Number \*

Expiration Date \*

CVN \*

This code is a three or four digit number printed on the back or front of credit cards.

20. Customer inputs the “**Billing Information**”

客戶輸入 “**Billing Information**”

21. Customer inputs the “**Payment Details**”

客戶輸入 “**Payment Details**”

22.

## Payment Confirmation

### Payment Confirmation

Thank you. Your payment has been accepted.  
This is your confirmation for :

#### Policy Details

Policy Number	T0891161-PTR
Insured	WONG LAI CHUN
Period of Insurance	From 1 Aug 2020 To 7 Aug 2020
Receipt number	5936808056536643103001
Amount	HKD 536.46

CLOSE

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23.



CLOSE

QBE Travel Policy No.: HKSI-T0891161-PTR. Period: 01/08/20-07/08/20. 24-hr helpline: [+852 2862 0138](tel:+85228620138). QBE Claims: [claims.qbe.com/hk/travel](https://claims.qbe.com/hk/travel). Thank you!  
昆士蘭聯保旅遊保險保單號碼：HKSI-T0891161-PTR。日期：01/08/20-07/08/20。24小時緊急援助熱線：[+852 2862 0138](tel:+85228620138)。網上索賠：[claims.qbe.com/hk/travel](https://claims.qbe.com/hk/travel)。謝謝！

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24. Customer immediately receives the SMS with QBE Travel Policy No. and 24-hr Helpline No.

客戶馬上收到一個 SMS，內有 QBE 保單號碼及 24 小時緊急援助熱線

25. At the same time, Agent receives the “Payment Receipt” email

與此同時，Agent 收到 “Payment Receipt” 電郵

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## Qnect - Travel Insurance T0891161 Payment Receipt - WONG LAI CHUN

QnectAsia@qbe.com

To Wong Yiu Wah

Dear WONG LAI CHUN,

Thank you. Your payment has been accepted.

This is your confirmation for:

Policy Details

Policy Number : T0891161

Insured : WONG LAI CHUN

Period of Insurance : From: 1 Aug 2020 To: 7 Aug 2020

Payment Amount : HKD 536.46

Receipt Number : 5936808056536643103001

**Made possible**



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## Policy

### Insurance Details

**Policy No:** T0891161  
**Policy Type:** Travel Insurance (PTR)  
**Insured:** WONG LAI CHUN  
**Address:** UNIT 610 6/F CHING HONG BUILDING 321  
 WANCHAI ROAD WANCHAI  
**Agent:** Wong Yiu Wah

**Policy Status:** In Force  
**Policy of Insurance:** 01/08/2020 to 07/08/2020  
**Wording:** UWD.PTRVS.E.V4.1807  
**SP Attn Code:** 00  
**Branch:** 01

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[Risks](#) [Transaction History](#) [Documents](#)

**Transaction Type (expand/collapse)**      **Effective Date**      **Email**      **Document Type**

New Business Issue

01/08/2020

#### Policy Documents:

- [Schedule - Client Copy](#)
  - [Schedule - Intermediary Copy](#)
  - [Policy Wording](#)
  - [Debit Credit Note - Client Copy](#)
  - [Debit Credit Note - Intermediary Copy](#)
  - [Summary of Benefits](#)
  - [Outbound Travel Alert](#)
  - [24-hr Worldwide Emergency Assistance Cards](#)
  - [Receipt](#)
- Policy Documents: Chinese**
- [Schedule - Client Copy \(CHINESE\)](#)
  - [Schedule - Intermediary Copy \(CHINESE\)](#)
  - [Policy Wording \(CHINESE\)](#)
  - [Debit Credit Note - Client Copy \(CHINESE\)](#)
  - [Debit Credit Note - Intermediary Copy \(CHINESE\)](#)
  - [Summary of Benefits \(CHINESE\)](#)
  - [Outbound Travel Alert \(CHINESE\)](#)
  - [24-hr Worldwide Emergency Assistance Cards \(CHINESE\)](#)

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[CHECK FOR DOCUMENTS](#)

[POLICY OPTIONS+](#)

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26. [Documents](#) to enter the documents folder

[Documents](#) 進入文件夾頁面

27. “Document Type”

document link to view the document

文件連結去檢閱文件

28. to send the “Policy Document” to the customer

將 “Policy Document” 發送給客戶

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**From:** Wong Yiu Wah      **Date:** 3/7/2020      **New Business Issue**

**To\*** wonglai Chun@email.com

**Cc**

**Bcc**

**Subject** Customer WONG LAI CHUN

**Text**  
Dear WONG LAI CHUN,  
  
Thank you for insuring with QBE Insurance.  
We advise that you read the policy prior to  
your trip and carry with you the QBE 24-Hour

**Attachments****Policy Documents:**

- Schedule - Client Copy
- Schedule - Intermediary Copy
- Policy Wording
- Debit Credit Note - Client Copy
- Debit Credit Note - Intermediary Copy
- Summary of Benefits
- Outbound Travel Alert
- 24-hr Worldwide Emergency Assistance Cards
- Receipt

**Policy Documents: Chinese**

- Schedule - Client Copy (CHINESE)
- Schedule - Intermediary Copy (CHINESE)
- Policy Wording (CHINESE)
- Debit Credit Note - Client Copy (CHINESE)
- Debit Credit Note - Intermediary Copy (CHINESE)
- Summary of Benefits (CHINESE)
- Outbound Travel Alert (CHINESE)
- 24-hr Worldwide Emergency Assistance Cards (CHINESE)

**SEND** 

**Message Sent**

Your e-mail has been sent.

**OK**

29. **“To”** – System will default it to be the customer email address  
(can add other email addresses, using semicolon ( ; ) to separate them)  
**“To”** – 系統會預設它為客戶之電郵地址 (可以加入其他電郵地址 ; 並以 ( ; ) 相隔)
30. **“Subject”** – System will default the **“Subject”** to be the customer name but you may enter your own subject  
**“Subject”** – 系統會預設 **“Subject”** 為客戶名稱，但您可以輸入自定之郵件標題
31. **“Text”** – System will default the email content but you may enter your own email content  
**“Text”** – 系統會預設郵件內容，但您可以輸入自定之郵件內容
32. **“Attachments”** – System will default **“Policy Documents”** to be sent and you may uncheck the box besides the document’s name if you do not want to send it  
**“Attachments”** – 系統已預設附上 **“Policy Documents”**，但如該文件是不需要，可以剔除對應之方格
33.  
34. A pop-up message will show that the email has been sent and then    
頁面會有顯示電子郵件已發送，然後  

## Qnect - Travel Insurance T0891161 Policy Document

QnectAsia@qbe.com

To wonglaichun@email.com

 Attached file: Summary of Benefits-ASIA_17816297.pdf 249 KB	 Attached file: Schedule - Client Copy-ASIA_17816285.pdf 66 KB
 Attached file: Receipt-ASIA_17816284.pdf 37 KB	 Attached file: Policy Wording (CHINESE)-ASIA_17816296.pdf 1 MB
 Attached file: Outbound Travel Alert-ASIA-OTALERT_CHINESE.pdf 194 KB	 Attached file: Policy Wording-ASIA_17816295.pdf 940 KB
 Attached file: Summary of Benefits (CHINESE)-ASIA_17816298.pdf 432 KB	 Attached file: 24-hr Worldwide Emergency Assistance Cards-ASIA_17816299.pdf 22 KB
 Attached file: Schedule - Client Copy (CHINESE)-ASIA_17816286.pdf 84 KB	 Attached file: Outbound Travel Alert-ASIA-OTALERT.pdf 147 KB
 Attached file: 24-hr Worldwide Emergency Assistance Cards (CHINESE)-ASIA_17816300.pdf 37 KB	

Dear WONG LAI CHUN,

35

Thank you for insuring with QBE Insurance. We advise that you read the policy prior to your trip and carry with you the QBE 24-Hour Worldwide Emergency Assistance hotline number (852) 2862 0138.

If you have any enquiries on the coverage, Policy Schedule and Policy Wording, please do not hesitate to contact your agent – Wong Yiu Wah.

We, at QBE wish you a safe and enjoyable journey.

Travel insurance claims are now easier and faster with QBE Claims [claims.qbe.com/hk/travel](https://claims.qbe.com/hk/travel). From January 2019, only online submissions on the QBE Claims will be accepted.



35. Customer receives the “Policy Document” email

客戶收到 “Policy Document” 電郵

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## “Make Payment” by “Issue Policy”

### 36. Customer selects “Issue Policy”

客戶選擇 “Issue Policy”



### 37. Check the Mobile Number of the customer

核對客戶之 Mobile Number



## Policy

### Insurance Details

**Policy No:** T0891161  
**Policy Type:** Travel Insurance (PTR)  
**Insured:** WONG LAI CHUN  
**Address:** UNIT 610 6/F CHING HONG BUILDING 321  
 WANCHAI ROAD WANCHAI  
**Agent:** Wong Yiu Wah

**Policy Status:** In Force  
**Policy of Insurance:** 01/08/2020 to 07/08/2020  
**Wording:** UWD.PTRVS.E.V4.1807  
**SP Attn Code:** 00  
**Branch:** 01

[Risks](#) [Transaction History](#) [Documents](#)

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**Transaction Type (expand/collapse)**  
 New Business Issue

**Effective Date**  
 01/08/2020

**Email**

**Document Type**

**Policy Documents:**

- [Schedule - Client Copy](#)
- [Schedule - Intermediary Copy](#)
- [Policy Wording](#)
- [Debit Credit Note - Client Copy](#)
- [Debit Credit Note - Intermediary Copy](#)
- [Summary of Benefits](#)
- [Outbound Travel Alert](#)
- [24-hr Worldwide Emergency Assistance Cards](#)

**Policy Documents: Chinese**

- [Schedule - Client Copy \(CHINESE\)](#)
- [Schedule - Intermediary Copy \(CHINESE\)](#)
- [Policy Wording \(CHINESE\)](#)
- [Debit Credit Note - Client Copy \(CHINESE\)](#)
- [Debit Credit Note - Intermediary Copy \(CHINESE\)](#)
- [Summary of Benefits \(CHINESE\)](#)
- [Outbound Travel Alert \(CHINESE\)](#)
- [24-hr Worldwide Emergency Assistance Cards \(CHINESE\)](#)

**CHECK FOR DOCUMENTS** **POLICY OPTIONS**

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- 40. [Documents](#) to enter the documents folder
- [Documents](#) 進入文件夾頁面

### 41. “Document Type”

- document link to view the document
- 文件連結去檢閱文件

- 42. to send the “Policy Document” to the customer
- 將 “Policy Document” 發送給客戶

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**From:** Wong Yiu Wah**Date:** 3/7/2020

New Business Issue

**To\*** wonglai Chun@email.com**Cc****Bcc****Subject** Customer WONG LAI CHUN**Text**  
Dear WONG LAI CHUN,  
  
Thank you for insuring with QBE Insurance.  
We advise that you read the policy prior to  
your trip and carry with you the QBE 24-Hour**Attachments****Policy Documents:**

- Schedule - Client Copy
- Schedule - Intermediary Copy
- Policy Wording
- Debit Credit Note - Client Copy
- Debit Credit Note - Intermediary Copy
- Summary of Benefits
- Outbound Travel Alert
- 24-hr Worldwide Emergency Assistance Cards

**Policy Documents: Chinese**

- Schedule - Client Copy (CHINESE)
- Schedule - Intermediary Copy (CHINESE)
- Policy Wording (CHINESE)
- Debit Credit Note - Client Copy (CHINESE)
- Debit Credit Note - Intermediary Copy (CHINESE)
- Summary of Benefits (CHINESE)
- Outbound Travel Alert (CHINESE)
- 24-hr Worldwide Emergency Assistance Cards (CHINESE)

**SEND** 

**Message Sent**

Your e-mail has been sent.

**OK**



43. **“To”** – System will default it be the customer email address  
(can add other email addresses, using semicolon ( ; ) to separate them)  
**“To”** – 系統會預設它為客戶之電郵地址 (可以加入其他電郵地址 ; 並以 ( ; ) 相隔)
44. **“Subject”** – System will default the **“Subject”** to be the customer name but you may enter your own subject  
**“Subject”** – 系統會預設 **“Subject”** 為客戶名稱 , 但您可以輸入自定之郵件標題
45. **“Text”** – System will default the email content but you may enter your own email content  
**“Text”** – 系統會預設郵件內容 , 但您可以輸入自定之郵件內容
46. **“Attachments”** – System will default **“Policy Documents”** to be sent and you may uncheck the box besides the document’s name if you do not want to send it  
**“Attachments”** – 系統已預設附上 **“Policy Documents”** , 但如該文件是不需要 , 可以剔除對應之方格
47.  
48. A pop-up message will show that the email has been sent and then    
頁面會有顯示電子郵件已發送 , 然後  

## Qnect - Travel Insurance T0891161 Policy Document

QnectAsia@qbe.com

To wonglaichun@email.com

 Attached file: Debit Credit Note - Client Copy-ASIA_17833413.pdf 41 KB	 Attached file: Schedule - Client Copy-ASIA_17833411.pdf 66 KB
 Attached file: Summary of Benefits (CHINESE)-ASIA_17833423.pdf 480 KB	 Attached file: Summary of Benefits-ASIA_17833422.pdf 297 KB
 Attached file: Outbound Travel Alert-ASIA-OTALERT_CHINESE.pdf 194 KB	 Attached file: Schedule - Client Copy (CHINESE)-ASIA_17833412.pdf 84 KB
 Attached file: Debit Credit Note - Client Copy (CHINESE)-ASIA_17833416.pdf 59 KB	 Attached file: Outbound Travel Alert-ASIA-OTALERT.pdf 147 KB
 Attached file: 24-hr Worldwide Emergency Assistance Cards-ASIA_17833424.pdf 22 KB	 Attached file: 24-hr Worldwide Emergency Assistance Cards (CHINESE)-ASIA_17833425.pdf 36 KB
 Attached file: Policy Wording (CHINESE)-ASIA_17833421.pdf 1 MB	 Attached file: Policy Wording-ASIA_17833419.pdf 968 KB

Dear WONG LAI CHUN,

49

Thank you for insuring with QBE Insurance. We advise that you read the policy prior to your trip and carry with you the QBE 24-Hour Worldwide Emergency Assistance hotline number (852) 2862 0138.

If you have any enquiries on the coverage, Policy Schedule and Policy Wording, please do not hesitate to contact your agent – Wong Yiu Wah.

We, at QBE wish you a safe and enjoyable journey.

Travel insurance claims are now easier and faster with QBE Claims [claims.qbe.com/hk/travel](https://claims.qbe.com/hk/travel). From January 2019, only online submissions on the QBE Claims will be accepted.

Made possible



49. Customer receives the “Policy Document” email

客戶收到 “Policy Document” 電郵

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## **Part D**

### **Endorsement**

### **更改保單**

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The screenshot shows the Qnect dashboard with a navigation menu. The 'Policy Administration' menu is open, and 'Endorse a Policy' is highlighted with a red circle and the number '1'. Other menu items include 'Create a Marine Declaration', 'Find a Quote', 'Find a Policy / Cover Note', and 'Find Renewal Policies'. The dashboard also features a search bar, a 'Customise your dashboard here' button, and several content cards for notifications and transactions.

1 Use “Policy Administration” – “Endorse a Policy”  
 利用 “Policy Administration” 中之 “Endorse a Policy” 功能

2 “Search By” – “Policy Number / Cover Note”  
 從 “Search By” 中，  
 選擇 “Policy Number / Cover Note”  
 ▪ Input T0891161  
 輸入 T0891161

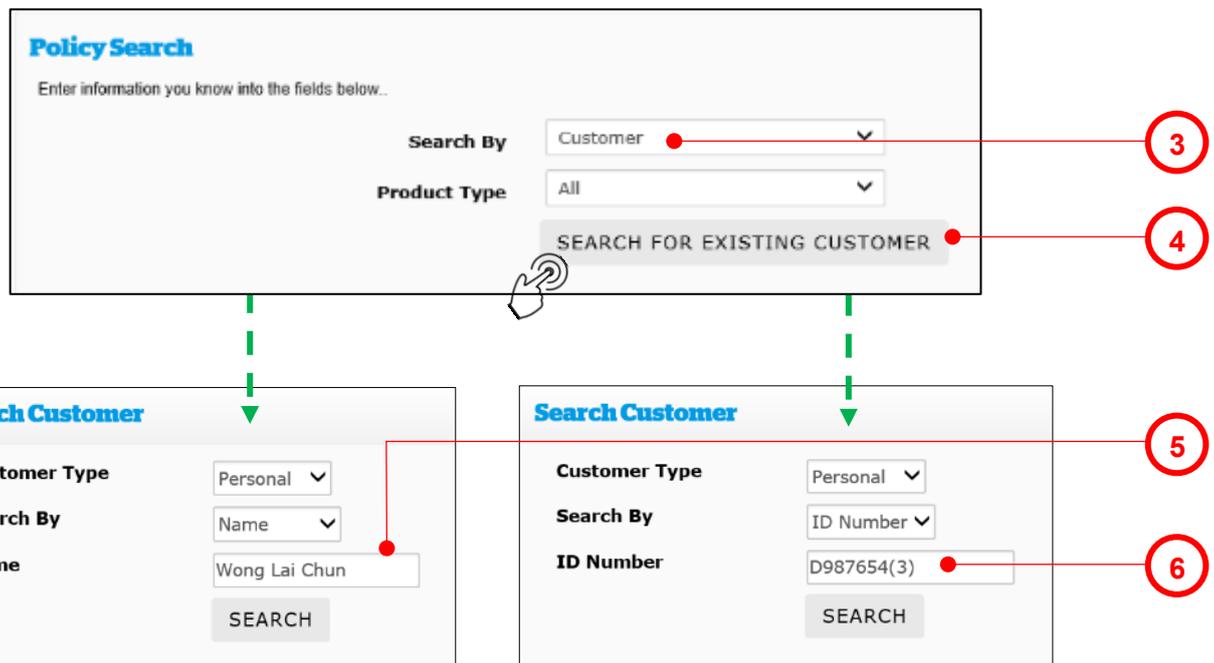
3 “Search By” – “Customer”  
 從 “Search By” 中，  
 選擇 “Customer”

SEARCH FOR EXISTING CUSTOMER 4  
 Personal

5 Select “Search By” – “Name”  
 從 “Search By” 中選擇 “Name”

6 Select “Search By” – “ID Number”  
 從 “Search By” 中選擇 “ID Number”

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## Policy

**Policy Search**  
Enter information you know into the fields below..

Effective Date\*: 03/07/2020

Search By: Policy Number / Cover Note

Policy Number\*: T0891161 (2)

SEARCH

**Search Results**

Policy / Cover Note #	Name of insured	Policy type	Status	Expires	Links
<a href="#">T0891161</a>	WONG LAI CHUN	Travel Insurance (PTR)	In Force	7/08/2020	

7. [T0891161](#) (7)

- Policy Number **T0891161** and go to the policy details
- Policy Number **T0891161** 去進入保單內容

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## Policy

### Insurance Details

**Policy No:** T0891161  
**Policy Type:** Travel Insurance (PTR)  
**Insured:** WONG LAI CHUN  
**Address:** UNIT 610 6/F CHING HONG BUILDING 321  
                  WANCHAI ROAD WANCHAI  
**Agent:** Wong Yiu Wah

**Policy Status:** In Force  
**Policy of Insurance:** 01/08/2020 to 07/08/2020  
**Wording:** UWD.PTRVS.E.V4.1807  
**SP Attn Code:** 00  
**Branch:** 01

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[Risks](#)   [Transaction History](#)   [Documents](#)

Section	Risk	Location / Type of Business	Commence	Terminate
No risks are active based on the effective date of inquiry. Click <a href="#">here</a> to inquire based on Inception Date of the policy.				

Clone  
Endorsement  
View Policy

POLICY OPTIONS

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8. “Insurance Details” main page

“Insurance Details” 頁面

9.  POLICY OPTIONS

10. Select “Endorsement”

選擇 “Endorsement”

- Major Destination: **Korea**
- Email Address: [wonglai Chungrace@email.com](mailto:wonglai Chungrace@email.com)
- Address: Unit 610, 6/F, Ching **Long** Building, 321 Wanchai Road, Wanchai, Hong Kong

**Endorsement**

Effective Date\* 01/08/2020

Reason\* Error correction

Period 01/08/2020 to 07/08/2020

Modify Cover Section  
Modify Risk Detail  
**Error correction**  
Modify Period of Insurance

SUBMIT

11. System will default endorsement “**Effective Date**” as policy effective date but it can be changed according to the customer’s needs.

系統已預設修改保單之 “**Effective Date**” 為保單生效日期，但可以根據客戶之實質需要去改變

12. Select “**Reason**” (e.g. “**Error correction**”)

選擇 “**Reason**” (例如 “**Error correction**”)

13. **SUBMIT**

**Travel** MODIFY

**Travel Details**

Major Destination\* Korea

Cover Type Single Trip

One Way Cover\* No

Plan Type\* Individual

Duration (days) 7

No. of Persons\* 1

Premium Breakdown:	Annual Premium	Premium Due	Levy	Total Due
Total	\$536.00	\$0.00	\$0.00	\$0.00
<b>Total Premium</b>				<b>0.00</b> HKD

14. **MODIFY**

15. Change “**Major Destination**” to Korea

更改 “**Major Destination**” 為 Korea

16. **NEXT**

**NEXT**

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## Customer Details

Customer Type*	Personal	▼
Name*	WONG LAI CHUN	
ID Number*	D987654(3)	
Title		▼
Gender*	Female	▼
Date of Birth	01/01/1980	
Nationality	HONG KONG	▼
Home Telephone Number		
Business Telephone Number		
Mobile Number	92233445	
Fax Number		
Email Address	wonglaichungrace@email.com	●
Unit / Floor Number	UNIT 610 6/F	
Building Number and Name	CHING LONG BUILDING	●
Street Number and Name*	321 WANCHAI ROAD	
District	WANCHAI	
Country*	HONG KONG	▼

Also print documents in Chinese ▼

Total Premium **0.00** HKD

17. Change the “Email Address”  
更改 “Email Address”

18. Change the “Address”  
更改 “Address”

- 19. ISSUE ENDORSEMENT
- 20. YES
- 21. OK

**Confirmation**

You are about to issue a policy contract with QBE. Are you sure that you have checked all information and that it is correct? Clicking on 'Yes' will mean that all information entered is accurate.

Click on 'No' if you have not checked the accuracy of all information entered or if you have incorrectly selected the Issue Policy option.

YES

Endorsement has been successfully issued.

OK

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## Policy

### Insurance Details

**Policy No:** T0891161  
**Policy Type:** Travel Insurance (PTR)  
**Insured:** WONG LAI CHUN  
**Address:** UNIT 610 6/F CHING LONG BUILDING 321  
 WANCHAI ROAD WANCHAI  
**Agent:** Wong Yiu Wah

**Policy Status:** In Force  
**Policy of Insurance:** 01/08/2020 to 07/08/2020  
**Wording:** UWD.PTRV5.E.V4.1807  
**SP Attn Code:** 00  
**Branch:** 01



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Risks Transaction History Documents

Transaction Type (expand/collapse)	Effective Date	Email	Document Type
Endorsement Issue	01/08/2020		<b>Policy Documents:</b> <a href="#">Schedule - Client Copy</a> <a href="#">Schedule - Intermediary Copy</a> <a href="#">Endorsement Note - Client Copy</a> <a href="#">Endorsement Note - Intermediary Copy</a> <a href="#">24-hr Worldwide Emergency Assistance Cards</a>

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- Documents to enter the documents folder  
 Documents 進入文件夾頁面
- “Document Type”**  
 document link to view the document  
 文件連結去檢閱文件
- to send the “Endorsement” to the customer  
 將 “Endorsement” 發送給客戶

QBE Hongkong & Shanghai Insurance Limited  
 23/F, Central Plaza, Leighton Road, 279 Hong Kong  
 Customer Service Hotline: +852 2920 1999

QBE  
 香港保險有限公司  
 香港保險有限公司  
 香港保險有限公司  
 香港保險有限公司  
 香港保險有限公司

Page 1 of 2 Date of Issue: 03/07/2020

**Travelon**  
**POLICY SCHEDULE** **Endorsement**

**Name and Address of the Insured**  
 WONG LAI CHUN  
 UNIT 610 6/F  
 CHING LONG BUILDING  
 WANCHAI  
 HONG KONG

Policy Number 保單號碼	Period of Insurance 承保日期 (Both Dates Inclusive)	Account Number 賬號
001000004 PTRB E002	01/08/2020 to 07/08/2020	00000000 Wong Yiu Wah

The updated Schedule of the Policy with effect from 01/08/2020 as follows:

**The Insured**  
 WONG LAI CHUN

**Coverage Summary**

**Travelon Single Trip**

**Insured Person(s)**  
 1. WONG LAI CHUN (ADULT)

**Plan Covered** Travelon Premier Individual **Major Destination** Korea  
**Departure Date** 01/08/2020  
**Duration (days)** 7  
**One Way Cover** NO

**Benefits Covered**  
 The benefits, sum insured and limits of liability are subject to the terms and conditions set forth in the Policy.  
 For any insured person above 75 or below 18 years of age, Personal Accident Benefits are subject to 50% of sum insured. Double Indemnity for Accidental Death or Permanent Disability on Common Carrier is not applicable.

**Declaration / Consent**  
 The Insured Person(s) will not be traveling contrary to the advice of a medical practitioner or for the purpose of obtaining medical treatment.  
 The Insured Person(s) is/are in good health and free from any physical impairment, infirmity, disability or deformity.  
 The Insured Person(s) is/are accompanied by parents or guardian if they are under 12 years of age.  
 The Insured Person(s) agreed(s) that the Policy is non-refundable (Single Trip Policy) and non-transferable once the Policy is issued.  
 The Insured Person(s) agreed(s) that the maximum duration is 182 days for Single Trip Policy and 90 days per trip for Annual Multi-Trip.  
 The Insured Person(s) accept(s) the terms, exclusions and conditions as set out in the Policy.  
 The Insured Person(s) has/have read and consented to the Personal Information Collection Statement  
<https://www.qbe.com.hk/privacy-policy.html>

**Travelon Single Trip**

**Insured Person(s)**  
 1. WONG LAI CHUN (ADULT)

**Plan Covered** Travelon Premier Individual **Major Destination** Korea  
**Departure Date** 01/08/2020  
**Duration (days)** 7  
**One Way Cover** NO

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## Correspondence

T0891161PTR

From: Wong Yiu Wah

Date: 3/7/2020

Endorsement Issue



To\* wonglaichungrace@email.com

Cc

Bcc

Subject Customer WONG LAI CHUN

Text  
Dear WONG LAI CHUN,  
  
Thank you for insuring with QBE Insurance.  
We advise that you read the policy prior to  
your trip and carry with you the QBE 24-Hour

### Attachments

#### Policy Documents:

- Schedule - Client Copy
- Schedule - Intermediary Copy
- Endorsement Note - Client Copy
- Endorsement Note - Intermediary Copy
- 24-hr Worldwide Emergency Assistance Cards

#### Policy Documents: Chinese

- Schedule - Client Copy (CHINESE)
- Schedule - Intermediary Copy (CHINESE)
- Endorsement Note - Client Copy (CHINESE)
- Endorsement Note - Intermediary Copy (CHINESE)
- 24-hr Worldwide Emergency Assistance Cards (CHINESE)

SEND



**Message Sent**

Your e-mail has been sent.

OK



[Back to Contents](#) 返回目錄

25. **“To”** – System will default it be the customer email address  
(can add other email addresses, using semicolon ( ; ) to separate them)  
**“To”** – 系統會預設它為客戶之電郵地址 (可以加入其他電郵地址 ; 並以 ( ; ) 相隔)
26. **“Subject”** – System will default the **“Subject”** to be the customer name but you may enter your own subject  
**“Subject”** – 系統會預設 **“Subject”** 為客戶名稱，但您可以輸入自定之郵件標題
27. **“Text”** – System will default the email content but you may enter your own email content  
**“Text”** – 系統會預設郵件內容，但您可以輸入自定之郵件內容
28. **“Attachments”** – System will default **“Policy Documents”** to be sent and you may uncheck the box besides the document’s name if you do not want to send it  
**“Attachments”** – 系統已預設附上 **“Attachments”**，但如該文件是不需要，可以剔除對應之方格
29.  
30. A pop-up message will show that the email has been sent and then    
頁面會有顯示電子郵件已發送，然後  
31. Customer receives the **“Policy Document”** email  
客戶收到 **“Policy Document”** 電郵

## Customer WONG LAI CHUN

QnectAsia@qbe.com

To wonglaichungrace@email.com

 Attached file: Schedule - Client Copy-ASIA_17835780.pdf 66 KB	 Attached file: Schedule - Client Copy (CHINESE)-ASIA_17835781.pdf 84 KB
 Attached file: 24-hr Worldwide Emergency Assistance Cards (CHINESE)-ASIA_17835795.pdf 37 KB	 Attached file: 24-hr Worldwide Emergency Assistance Cards-ASIA_17835794.pdf 22 KB

Dear WONG LAI CHUN,

31

Thank you for insuring with QBE Insurance. We advise that you read the policy prior to your trip and carry with you the QBE 24-Hour Worldwide Emergency Assistance hotline number (852) 2862 0138.

If you have any enquiries on the coverage, Policy Schedule and Policy Wording, please do not hesitate to contact your agent – Wong Yiu Wah.

We, at QBE wish you a safe and enjoyable journey.

Made possible



~ End ~

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