

Programme Guide

Professional Agency Management Programme (PAMP)

SIC Claimable Programme Workflow

1. Enrolment
 - 1.1 PIC submits a training request to Asian Institute of Insurance (Aii).
 - 1.2 Upon confirmation of the training engagement, PIC downloads the **Registration** template from Aii's iLMS and completes it with the required details: name, IC number, email address, agent code, agency unit and contact number. (Appendix 1)
 - 1.3 PIC uploads the completed Registration template into Aii's iLMS within **T+3 business days**.
 - 1.4 PIC will receive the **payment invoice**, and the **Pre-Training Tracking** template (Appendix 2a/2b) to input the pre-training performance data e.g., MAPA, 1st year and 2nd year persistency, and CFF completion rate for the respective participants.
 - 1.5 The pre-training performance data will include data for **six (6) consecutive months** leading up to the month in which the training programme is held.

Illustration:

Scheduled Training Date	6 – 7 July 2026 (early month)	or	14 – 15 July 2026 (mid-month)	or	23 – 24 July 2026 (month end)
Pre-Training Performance Data	June 2026 (1 month before training month) May 2026 (2 months before training month) April 2026 (3 months before training month) March 2026 (4 months before training month) February 2026 (5 months before training month) January 2026 (6 months before training month)				

- 1.6 The PIC / life insurance company shall:
 - i. arrange full payment based on the invoice issued by Aii.
 - ii. completes and return the *Pre-Training Tracking* template to Aii within **T+10 business days** before the first day of training.
- 1.7 Aii will send email reminders to participants **10** and **3 business days** prior to the training date to confirm and welcome their attendance. (Appendix 3a/3b)
- 1.8 The training programme shall be conducted as scheduled.

1.9 Within **T+1 business day** after the training is concluded, PIC downloads the **Post-Training Tracking** template (Appendix 5a/5b) from iLMS to input the post-training performance data. This template is required to be completed **monthly** for **six (6) consecutive months** and submits to Aii **monthly**.

1.10 The first post-training report is due by the 5th day of the subsequent month, based on the month-end cycle after training.

Illustration:

Training Concluded	6 – 7 July 2026 (early month)	or	14 – 15 July 2026 (mid-month)	or	23 – 24 July 2026 (month end)
End of Month	31 July 2026 (Month 0) 31 August 2026 (Month 1) 30 September 2026 (Month 2) 31 October 2026 (Month 3) 30 November 2026 (Month 4) 31 December 2026 (Month 5) 31 January 2027 (Month 6)				
Submission to Aii	5 September 2026 (*Month 1 report) 5 October 2026 (*Month 2 report) 5 November 2026 (*Month 3 report) 5 December 2026 (*Month 4 report) 5 January 2027 (*Month 5 report) 5 February 2027 (*Month 6 report)				

2. Overdue Reporting

2.1 In the event of a delay, Aii will send a reminder email on **T+3 business days after** the due date for submission of the Month 1/2/3/4/5/6 reports (Appendix 6a/7a/8a/9a/10a/11a).

2.2 If the report is received on time, no reminder email is sent.

3. Acknowledgement and Notification

3.1 Upon receipt of each monthly report, Aii sends an acknowledgement email to the PIC (Appendix 6b/7b/8b/9b/10b/11b).

3.2 Within **T+10 business days** from the date of submission of Month 6 (final) report, the PIC will be able to download all reports together with the consolidated **SIC Claim Submission Report** (Appendix 12) from iLMS.

The following reports are available for download:

Appendix 2b	Pre-Training Tracking template
Appendix 4	Post-Training Attendance Record
Appendix 5b	Post-Training Tracking template
Appendix 12	SIC Claim Submission Report

3.3 All downloadable reports are in PDF file format with Aii logo as watermark.

Programme Guide

Professional Agency Management Programme (PAMP)

Appendixes

Appendix 1 – Registration Template

[illegible]

Appendix 2a – Email Notification on Invoice and Pre-Training Tracking template

Subject: Invoice and Pre-Training Tracking Template – “Programme Name”

Dear PIC Name,

Thank you for your trust in our “Programme Name”. Attached is the invoice to complete the registration process.

We have also enclosed the Pre-Training Tracking template. Please complete and return it within 10 business days before the programme date so we can ensure a smooth and successful experience for your agency.

The template is to include pre-training performance data for **six (6) consecutive months** prior to the month training programme takes place.

We are committed to support your team in this learning journey. Should you have any questions, please do not hesitate to reach out to us at FacultyLife@aiiasia.org

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Appendix 2b – Pre-Training Tracking (PAMP)

Pre-Training Tracking (PAMP)

Name of Life Insurance Company: _____

Training Date: _____

Period of Tracking:

- | | |
|--|--------------------------------|
| | 1 month before Training Month |
| | 2 months before Training Month |
| | 3 months before Training Month |
| | 4 months before Training Month |
| | 5 months before Training Month |
| | 6 months before Training Month |

[illegible]

Appendix 3a – Email Reminder 1 to Participants

Subject: Programme Participation – “Programme Name”

Dear Participant Name,

Congratulations for registering for the upcoming “Programme Name”. We are delighted to have you join us. Please find below the programme details:

Programme Name: “Programme Name”

Programme Date: “Programme Duration”

Programme Time: 09:00 – 17:00

Programme Venue: “Programme Venue”

We look forward to welcoming you and appreciate your punctual arrival to ensure a smooth start to the programme.

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Appendix 3b – Email Reminder 2 to Participants

Subject: Reminder to attend "Programme Name"

Dear Participant Name,

Hi, it's us again.

This is a friendly reminder of your upcoming participation in "Programme Name". We are excited to have you join us and look forward to an engaging and productive session.

Programme Name: "Programme Name"

Programme Date: "Programme Duration"

Programme Time: 09:00 – 17:00

Programme Venue: "Programme Venue"

In just **three more days**, you will be embarking on a learning journey that will potentially propel your agency business to the next level.

As traffic to the programme venue can be unpredictable, please plan your journey accordingly to ensure a prompt start as per the programme schedule.

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Appendix 4 – Post-Training Attendance Record

Post-Training Attendance Record

Life Insurance Company :

Programme :

Start Date :

End Date :

No	Name	NRIC	Email	Agent Code	Agency Unit (Agent / UM / AM)	Date 1	Date 2	Date 3	Date 4
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19									
20									
21									
22									
23									
24									
25									

Appendix 5a – Email Notification on Post-Training Tracking template

Subject: Post-Training Tracking Template – “Programme Name”

Dear PIC Name,

Thank you for choosing Aii to be your learning partner in the recently concluded “Programme Name”. We appreciate your continued collaboration.

We enclosed the Post-Training Tracking template, a requirement to monitor the effectiveness of the programme to ensure SIC claim eligibility. Please complete and submit the template **monthly** for **six (6) consecutive months** according to the following timeline:

- 1) Month One – on the date 5th of 2 months after “Programme Duration”.
- 2) Month Two – on the date 5th of 3 months after “Programme Duration”.
- 3) Month Three – on the date 5th of 4 months after “Programme Duration”.
- 4) Month Four – on the date 5th of 5 months after “Programme Duration”.
- 5) Month Five – on the date 5th of 6 months after “Programme Duration”.
- 6) Month Six – on the date 5th of 7 months after “Programme Duration”.

Should you have further questions, please do not hesitate to contact us at FacultyLife@aiaasia.org

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Appendix 5b – Post-Training Tracking (PAMP)

Post-Training Tracking (PAMP)

Name of Life Insurance Company: _____

Training Date: _____

Period of Tracking:

- | | |
|--|---------|
| | Month 1 |
| | Month 2 |
| | Month 3 |
| | Month 4 |
| | Month 5 |
| | Month 6 |

[illegible]

Appendix 6a – Email Reminder on Post-Training Tracking (Month 1) Submission

Subject: Reminder to Submit Month One Report

Dear **PIC Name**,

We understand that ongoing sales activities and field efforts may have delayed submission of your **Month One report**.

Kindly please prioritize completing the necessary documentation and upload your final Month One figures into iLMS at your earliest convenience to ensure timely reconciliation.

We look forward to receiving your report soon.

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Appendix 6b – Acknowledgement of Post-Training Tracking (Month 1) Submission

Subject: Acknowledged Received of Month One Report

Dear PIC Name,

We are pleased to confirm received of your Month One report.

We will review and validate the document. We will contact you if any additional information or clarification is required. Thank you.

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Appendix 7a – Email Reminder on Post-Training Tracking (Month 2) Submission

Subject: Reminder to Submit Month Two Report

Dear PIC Name,

This is a gentle reminder that your Month Two report is still pending submission.

Please upload the completed report to iLMS at your earliest convenience to ensure timely processing and reconciliation.

We look forward to receiving your report soon.

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Appendix 7b – Acknowledgement of Post-Training Tracking (Month 2) Submission

Subject: Acknowledged Received of Month Two Report

Dear PIC Name,

We are pleased to confirm received of your Month Two report.

We will review and validate the submitted document. We will contact you if any additional information or clarification is required. Thank you.

This letter is auto generated and requires no signature

Appendix 8a – Email Reminder on Post-Training Tracking (Month 3) Submission

Subject: Reminder to Submit Month Three Report

Dear PIC Name,

We are excited to see the progress and achievements generated from the programme. The Month Three report helps showcase the positive impact and successes achieved along the journey. Kindly submit the latest figures via iLMS so that we can capture these outcomes together.

We look forward to hearing your success story.

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Appendix 8b – Acknowledgement of Post-Training Tracking (Month 3) Submission

Subject: Acknowledged Received of Month Three Report

Dear PIC Name,

We are pleased to confirm received of your Month Three report.

We will review and validate the document. We will contact you if any additional information or clarification is required. Thank you.

This letter is auto generated and requires no signature

Appendix 9a – Email Reminder on Post-Training Tracking (Month 4) Submission

Subject: Reminder to Submit Month Four Report

Dear PIC Name,

Meaningful results are built through consistent effort and reporting. Your continued participation enables us to accurately track progress and demonstrate the value created through the programme. We would appreciate your assistance in submitting Month Four report via iLMS at your earliest possible.

Thank you for being part of this journey of continuous improvement.

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Appendix 9b – Acknowledgement of Post-Training Tracking (Month 4) Submission

Subject: Acknowledged Received of Month Four Report

Dear PIC Name,

We are pleased to confirm received of your Month Four report.

We will review and validate the document. We will contact you if any additional information or clarification is required. Thank you.

This letter is auto generated and requires no signature

Appendix 10a – Email Reminder on Post-Training Tracking (Month 5) Submission

Subject: Reminder to Submit Month Five Report

Dear PIC Name,

We wish to follow up on the outstanding Month Five report and remain committed to supporting your successful completion of the reporting process. A few minutes invested today will help ensure your agencies' achievements are properly recorded and recognised. Kindly upload the report via iLMS as soon as possible.

We look forward to receiving your submission and closing this milestone together.

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Appendix 10b – Acknowledgement of Post-Training Tracking (Month 5) Submission

Subject: Acknowledged Received of Month Five Report

Dear PIC Name,

We are pleased to confirm received of your Month Five report.

We will review and validate the document. We will contact you if any additional information or clarification is required. Thank you.

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Appendix 11a – Email Reminder on Post-Training Tracking (Month 6) Submission

Subject: Reminder to Submit Month Six (Final) Report

Dear PIC Name,

This is a friendly reminder that your Month Six report is pending submission.

As this marks the final reporting cycle for the programme, we appreciate your prompt action in uploading the completed report to iLMS to ensure accurate reconciliation and closure.

Thank you for your continued cooperation throughout the reporting period. We look forward to receiving your submission soon.

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Appendix 11b – Acknowledgement of Post-Training Tracking (Month 6) Submission

Subject: Acknowledged Received of Month Six (Final) Report

Dear **PIC Name**,

We are pleased to confirm received of your Month Six report.

We will review and validate the document. We will contact you if any additional information or clarification is required.

The following reports will be available for download from iLMS within **T+10 business days**.

1. Post-Training Attendance Record
2. Pre-Training Tracking (6 months)
3. Post-Training Tracking (6 months)
4. SIC Claim Submission Report

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Appendix 12 – SIC Claim Submission Report

SIC Claim Submission Report

Name of Life Insurance Company: _____

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