**Credit Life(non-medical) Process**

This document aims to capture the understanding of the CREDIT LIFE (non-medical) workflow that needs to be automated by the Planit automation team.

**Workflow Process**:

The high level workflow consists of the below steps:

1. Consolidation of excels (Client and Macro)
2. Run & Upload Macro file
3. Batch Processing
4. Follows up for the members of the master policy
5. Medical decision flag
6. Generating the Receipts
7. Policy Issuance
8. Check policy status

**Consolidation of excels:**

* Provided client excel input file will be varying from business partner to partner.
* The data in the input file need to capture and put in to the macro file.
* Some standard data need to be putted in few columns of macro file and it will be provided by FG.
* Logic for the plan number, risk term, product code and Interest rate should be providing by FG.
* Some column names are duplicate in input file and same to be present in macro file too.
* Columns with Heights in cm, Weight in kg, Heights in units, weight in units are not required.

**Run & Upload Macro file:**

* Once the macro file prepared, Run the macro file and upload the generated text file through dtt to Group Asia.

**Batch Processing:**

* Run the batch run and capture the batch schedule number.
* Verify the spool file to check how many members from the master file get uploaded successfully and an error log should be there for the members which are not uploaded successfully.

**Follow-up for the members of the master policy:**

* Verify the successfully uploaded members are there at the policy enquiry screen.
* After verifying for each member’s medical decision, follow ups acceptance should be done by changing the status form **O (Outstanding) to R.**

**Medical decision flag:**

* After Follow up done, change medical decision flag for each member of the master policy from **7** to **2.**
* Change the ready to issue flag to **Y** in the ‘MATA-addition data – 2 Major Altn’ screen.

**Generating the Receipts:**

* Once medical decision flag is changed need to generate the receipts for all successfully uploaded members.
* To generate the receipts, run the trail bill and extract the policy details data in a local drive and prepare the premium details for each member in the sheet and generate the receipts in the system.
* Generating receipts can be done with-out running the trail bill and that info will be at master policy level.
* Receipts related condition like BG and without BG should be given by FG.

**Policy Issuance:**

* After receipts done, issue policy for all the successfully uploaded members of the master policy.

**Check policy status:**

* After policy issuance check the status of the members are in IF (In Force) and Y at ‘works with member enquiry’ screen.