USER GUIDE

PCIC RO10 Digital Insurance Application

Streamlining Agricultural Protection through Digital Innovation

1   Introduction

Welcome to the PCIC RO10 Digital Insurance Application. This platform is designed to modernize the insurance application process, ensuring faster turnaround times and improved data accuracy for our farmers and stakeholders.

2   Initial System Setup

Before processing applications, ensure the system is correctly configured by following these steps:

1. **Database Import:**

   - Click the **Menu (Burger)** button and locate the **Settings Container**.
   - In the Database section, upload the Farmer Profile and Insurance History CSV files into their respective upload fields.
   - **Verification:** Wait for the success message. Check the application header; the farmer and record counts should update automatically to reflect the imported data.

2. **Agent Identification:**

   - Enter your full name in the **AGENT** input field. This ensures all processed applications are properly attributed to you.

3. **Form Calibration:**

   - Click the **Calibration** button.
   - Review each insurance line form to ensure red indicators (dots) are accurately placed in their target fields.
   - If the dots are misaligned, click **Upload** to import the specific calibration file for that insurance line.

4. **Navigation:**

   - Click the **Menu** button and proceed to **Search Farmer** to begin the live application process.

3   Application Procedure

Follow this workflow for consistent and error-free application processing:

1. **Farmer Identification:** Use the filtering tools to search for a farmer. Click **Search Database**.

   - If the farmer is found: Select the record.
   - If no result is found: Click **New Application**.

2. **Data Entry:**

   - **New Applicant:** Manually input all required field information.
   - **Existing Farmer:** Review the pre-filled information and update any details as necessary.

3. **Policy Details:** Navigate to the **Policy Details** tab. Select the desired Insurance Line and fill in the commodity-specific information.

4. **Insurance Line Workflow:**

   - **Crop Insurance:** Navigate to the Farm Details section. Select the existing farm from the dropdown or manually input new farm details if not listed.
   - **ADSS, Livestock, & Banca:** Fill in the required details and proceed directly to the **Signature** tab.

5. **Consent & Signing:** In the Signature tab, confirm that the farmer has read the **Consent Form** before capturing the digital signature.

6. **Submission & Continuous Processing:**

   - Click **Download Application Form** if moving to a different farmer.
   - Click **Download and Add Another Policy** if the same farmer wishes to insure an additional commodity.

7. **Storage:** Save the downloaded file into your local designated folder using the standard naming convention.

4   Exporting Summary Reports

To generate reports for submission or monitoring:

1. Click the **Menu** button and select the **Summary** container.

2. Use the filters to isolate data by **Commodity** or date range.

3. Click **Export CSV**. When prompted, save the file to your reports folder.

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