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# **Corporate Client Portal – PACE**

**By**

**TATA AIA Life Insurance Company Ltd.**



## **User Manual**

**Version 1.0 | 22-Feb-2016**

**TATA AIA LIFE**

■ PACE ■ [www.Tataaia.com](http://www.Tataaia.com)

## Version History

Please keep the latest version on top

Ver	Change Description	Sections	Date	Author	Reviewer
1.0	Initial Version	All	22-FEB-16	Pankaj Shakya	Nikhil Chemburkar

## References

No Old references.

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## Purpose of this document

This document is a User Guide for all users interacting with the PACE portal.

The document covers all the functionalities implemented in this Phase of PACE Portal functionalities. It documents how each user role within the application would behave and the privileges and functionalities available to them.

## Scope of this document

The document covers the functionality available on the PACE Portal for the user role:

- User

This document covers the web based application interactions of the user roles.

## Definitions, Abbreviation and Acronyms

The terms in use in the document are explained below

Acronym	Description
TALIC	TATA AIA Life Insurance Company Ltd.
PACE	Policy Administration for Corporate Employees

## 1 Application Overview

This document serves as a User Manual for all users interacting with the PACE Portal application. The document provides detailed step-by-step procedure to be followed by a user to achieve the various functionalities provided by the portal.

### 1.1 Introduction

TALIC PACE Portal involves the development of new functionalities. Some of the functionalities are view past bills, payment of outstanding bills, online member addition, deletion, sum assured change, claim intimation of members, etc.

A user can login and get various details to monitor online transaction made by users, user id creations etc. during a certain period. User also does the activities like Customer password maintenance etc. The various modules that are available in the PACE Portal is given below:

The various modules that are developed in the PACE Portal are given below:

1. Policy Information
2. Member information
3. Billing and Bill payment
4. Claims
5. Servicing
6. Policy Name Change
7. Address details Updation
8. Address Change
9. Feedback
10. Display of Important events Via Ticker

## 2 User Activities

### 2.1 PACE Portal Link

The PACE Portal is accessed by opening the below link in a latest browser application version of (Internet Explorer 8 or higher, Chrome or Firefox Mozilla):

<http://www.tataaia.com/index.html>



Figure 1: TATA AIA Life Website

Click on the “Corporate” link on the top right menu located below the browser address bar Or Click at online Access to open three options then select “Corporate”. Refer to the screen shot below.

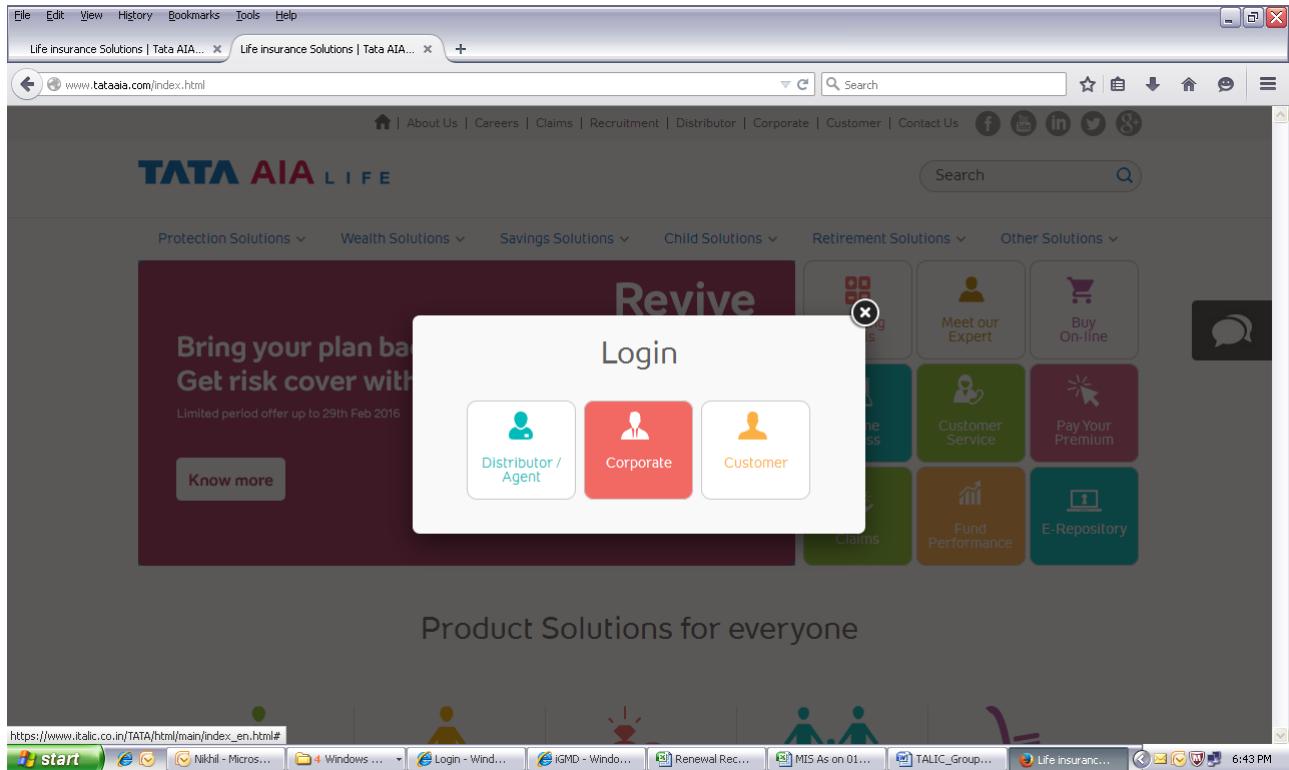


Figure 2: TATA AIA Life Website

On selection the following screen is displayed, where you need to select “Employer Online” in Term Product

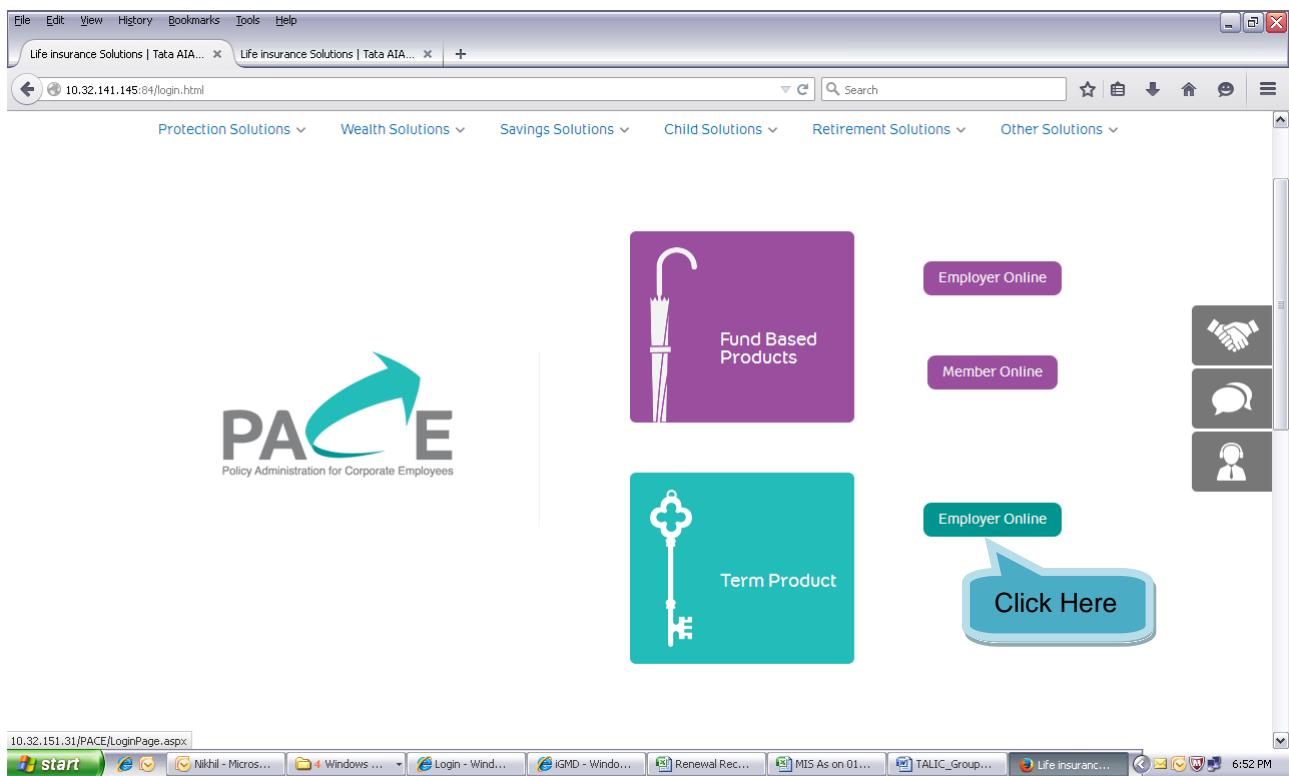


Figure 3: TATA AIA Life Website-PACE product selection page

## Login Page

The Login page prompts Customers to authenticate themselves by providing login credentials to access various functionalities on policy, bill payment, premium statement generation etc. This is the entry page to the PACE Portal

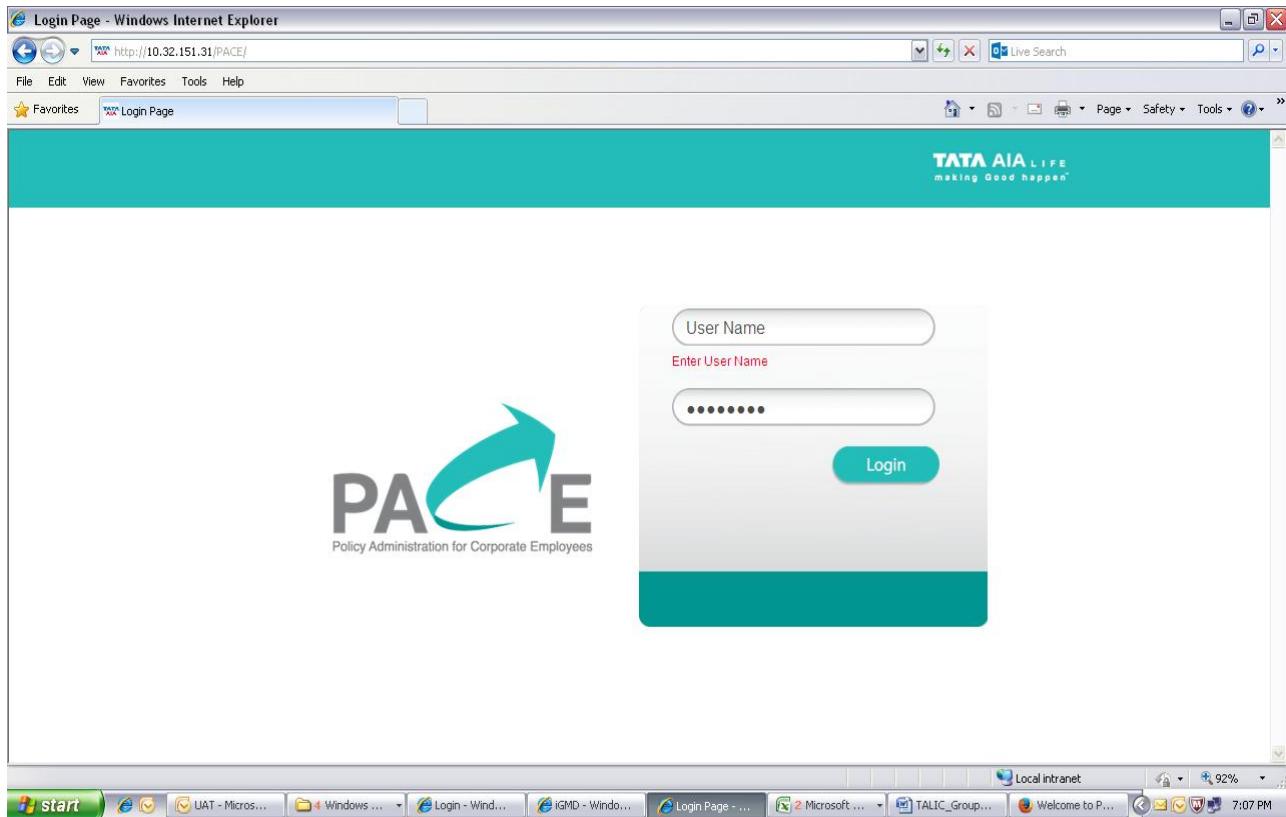


Figure 4: PACE Login Page

### Steps to Login to PACE Portal:

- (1) Enter User name and Password and click on the “Login” button.
- (2) System authenticates the credentials. On the first login if the authentication succeeds the Customer is redirected to the change password page to change the default password provided.

The Customer user id is locked after 5 unsuccessful attempts and a user will have to contact to Tata AIA life to get the user id unlocked.

Users have to mail at [Csin@tataaia.com](mailto:Csin@tataaia.com) along with respective service manager in CC to get the user Id unlocked and get the new password.

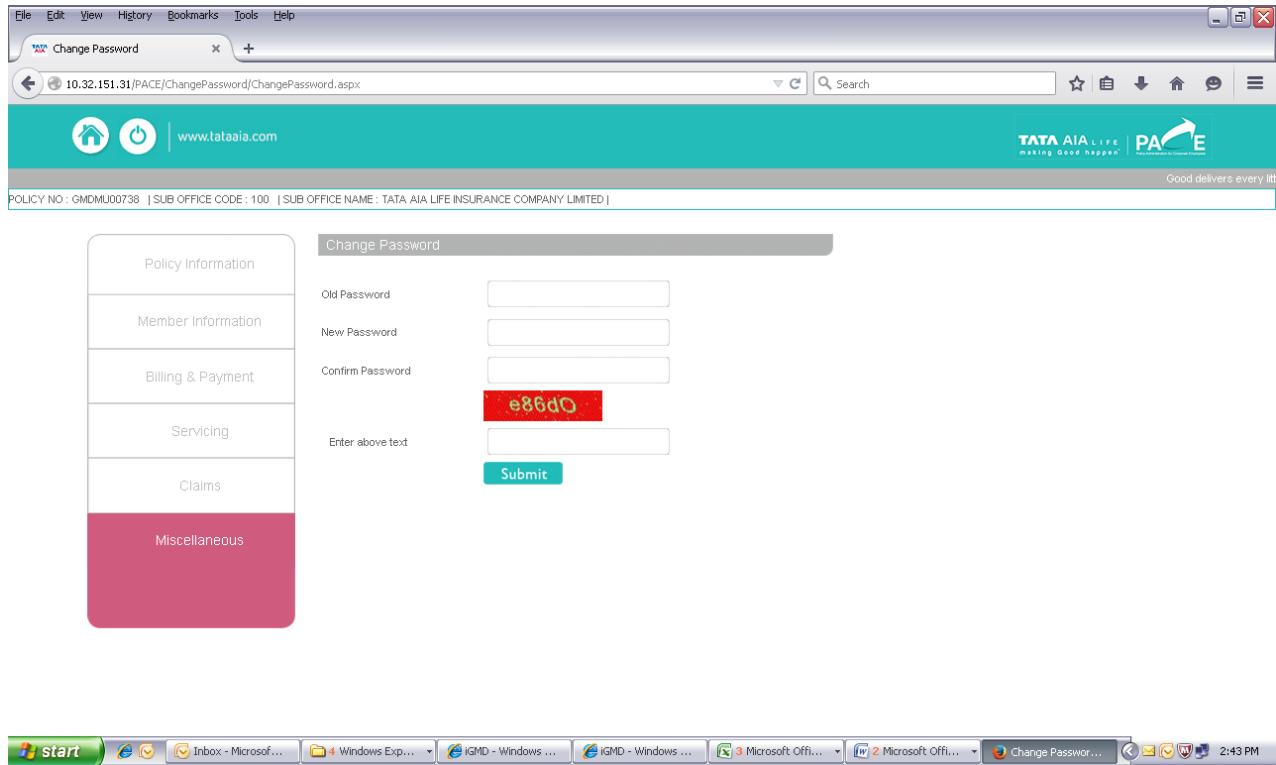


Figure 5: Change Password

Enter the existing password and new password along with Captha text and click on “SUBMIT” button. Customer password will be changed and below message will be displayed.

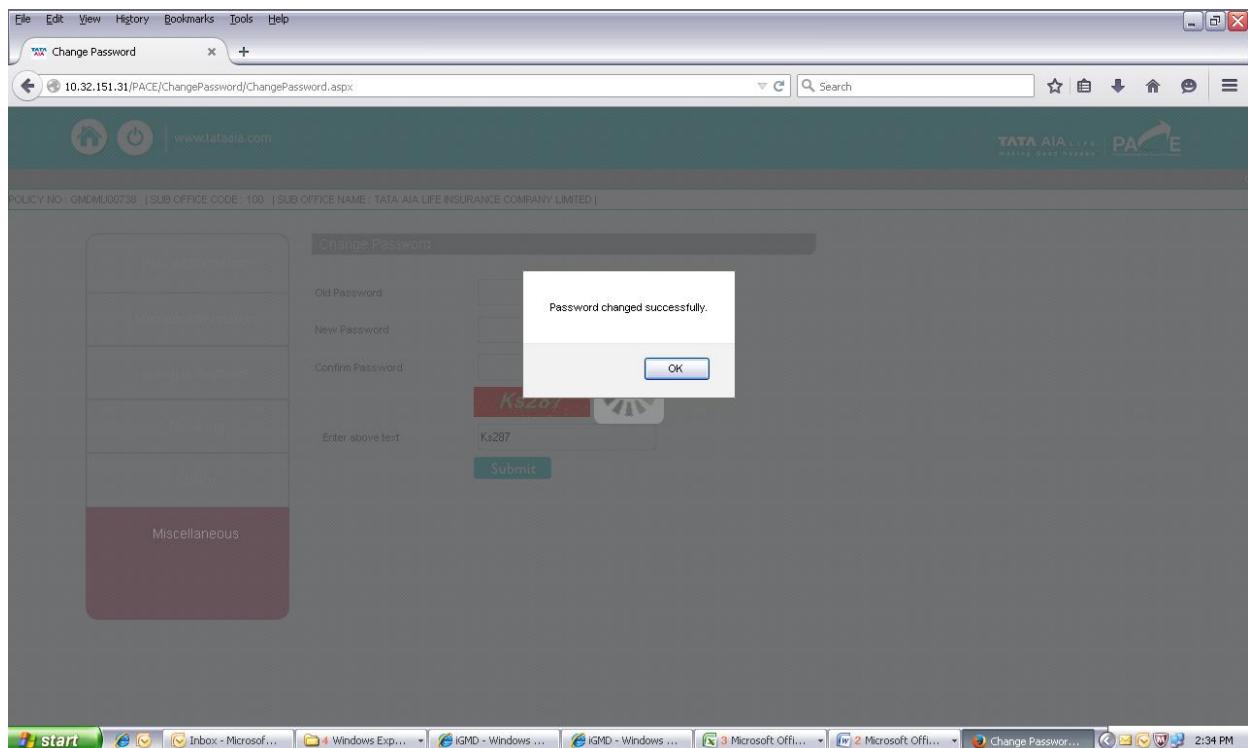


Figure 6: Change Password Success

Click on ok, then PACE Portal will re-direct and display the home page.

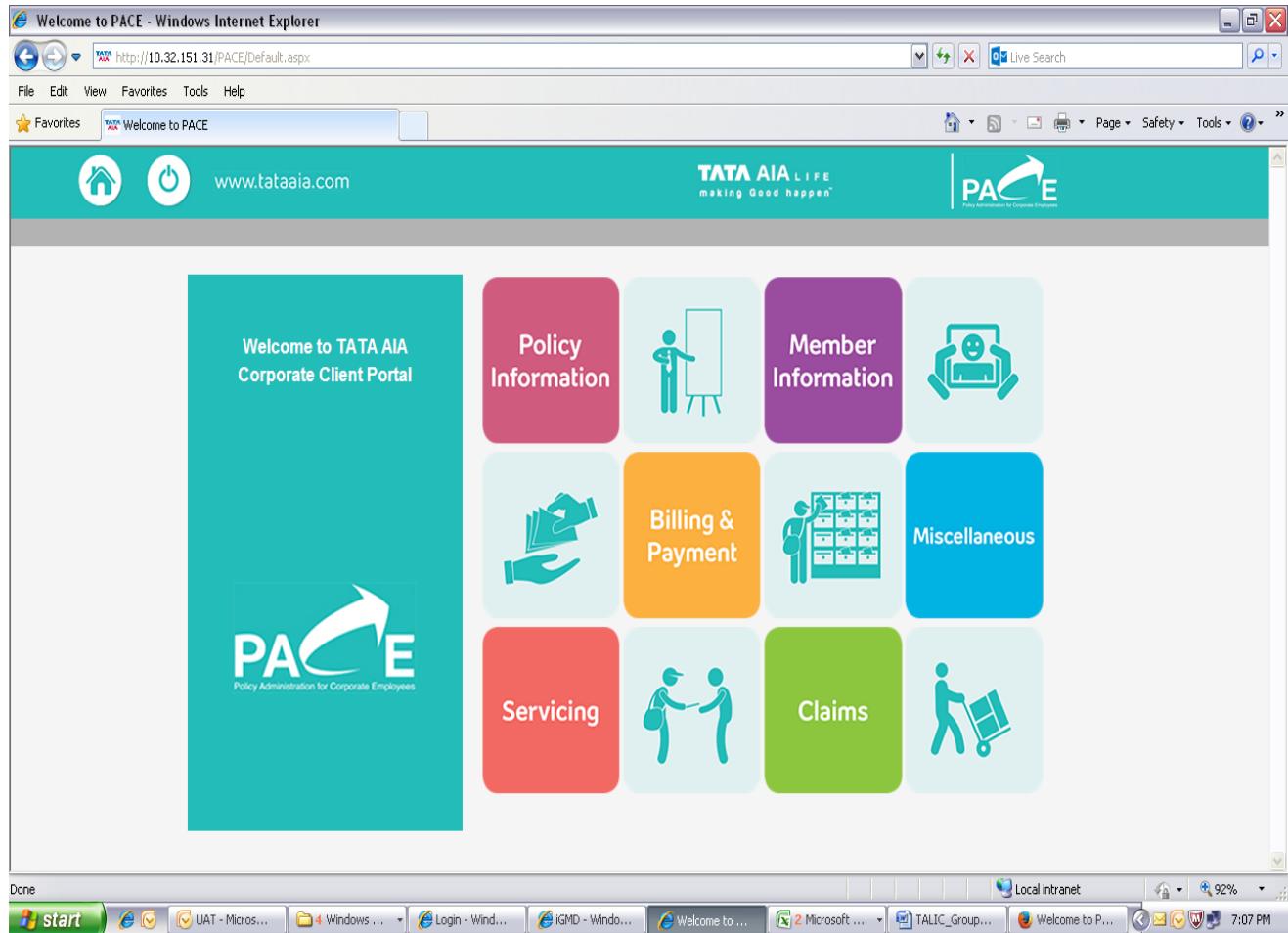


Figure 7: PACE Home Page

On the home page you can click on any options provided towards the right side in colored tile on to make your selection. At the top left side of the screen there two option which ‘Home’ and “logout”.

**Options at home screen:-**

- ✓ Policy Information
- ✓ Member Information
- ✓ Billing & Payment
- ✓ Servicing
- ✓ Claims
- ✓ Miscellaneous

On placing the cursor on the options mentioned on the home page a brief description of particular option will be displayed on left side of screen.

## 2.2 Policy Information

This tab gives you option to view and download details related to your policy, sub office etc. this tab comprise of sub tab as mentioned below:-

- Policy Enquiry
- Policy and Sub Office Access
- Client Contact Information
- Download

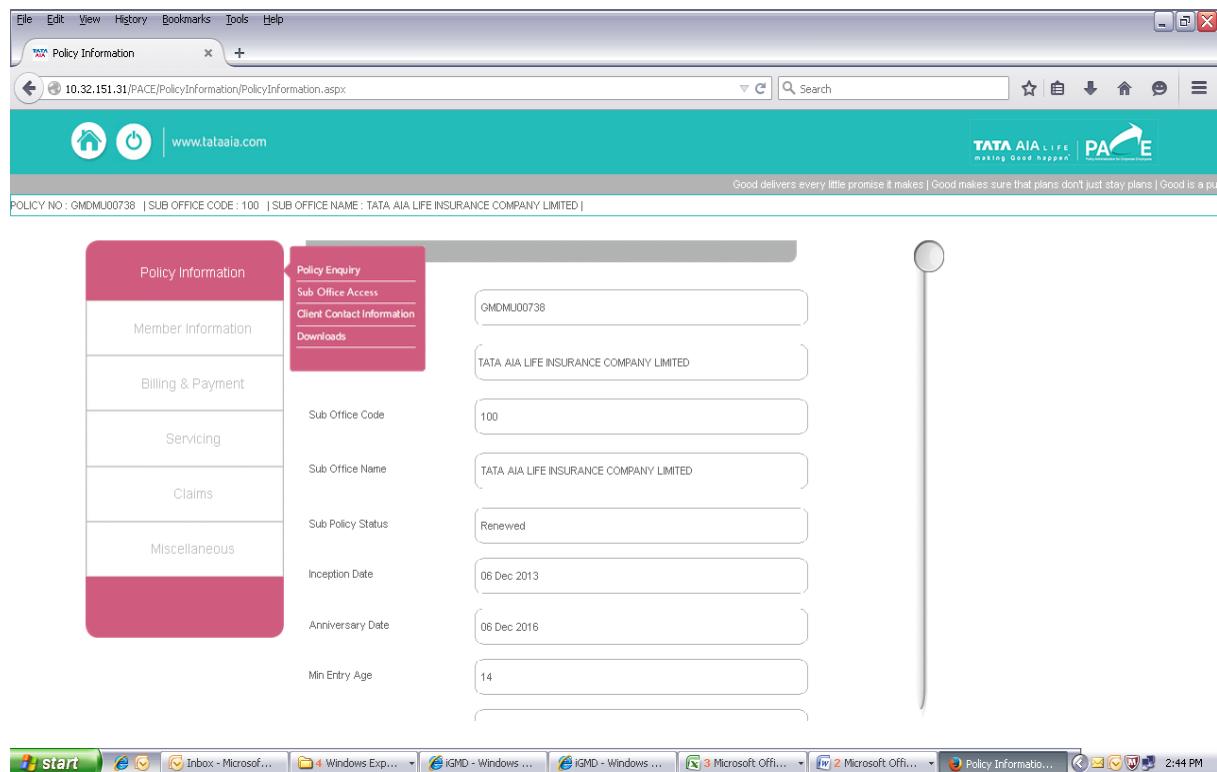


Figure 8: Policy Information Screen

The above mentioned sub tab will be discussed in details with their features and advantage in details in the forth coming pages of this user manual.

It will help you in accessing the details with ease and seamlessly on the portal.

## 2.2.1 Policy Enquiry

Under policy enquiry screen you can get information like product type, policy inception date, anniversary date of policy, maximum and minimum entry age of in policy , Active member counts etc.

The screenshot shows a Microsoft Internet Explorer window with the following details:

- Title Bar:** Policy Information - Windows Internet Explorer
- Address Bar:** http://10.32.151.31/PACE/PolicyInformation/PolicyInformation.aspx
- Menu Bar:** File, Edit, View, Favorites, Tools, Help
- Toolbar:** Back, Forward, Stop, Refresh, Live Search
- Favorites Bar:** Favorites, Policy Information, www.tataaia.com
- Header:** TATA AIA LIFE making Good happen | PACE
- Page Content:**
  - Policy Information:** Policy No: GMDMU00738, Client: TATA AIA LIFE INSURANCE COMPANY LIMITED, Sub Office Code: 100, Sub Office Name: TATA AIA LIFE INSURANCE COMPANY LIMITED, Sub Policy Status: Renewed, Inception Date: 06 Dec 2013, Anniversary Date: 06 Dec 2016.
- Sidebar:** Policy Information, Member Information, Billing & Payment, Servicing, Claims, Miscellaneous.
- Bottom:** Taskbar showing various open applications and system status.

Figure 9: Policy Enquiry Screen

Details description of these fields can also be read in the policy contract.

## 2.2.2 Policy & Sub Office Access

This screen gives option to select the policy if client have multiple polices with the TALIC. Same screen also gives the choice to select sub office within the respective policy. In case of multiple sub offices, as a default sub office no “100” is kept selected and same being the master sub office of any policy which has more than one sub office under it. Though user id and password are provided sub office wise, but 100 being master sub office it will have access to details of all the other sub office in the policy, but vice versa will not be possible.

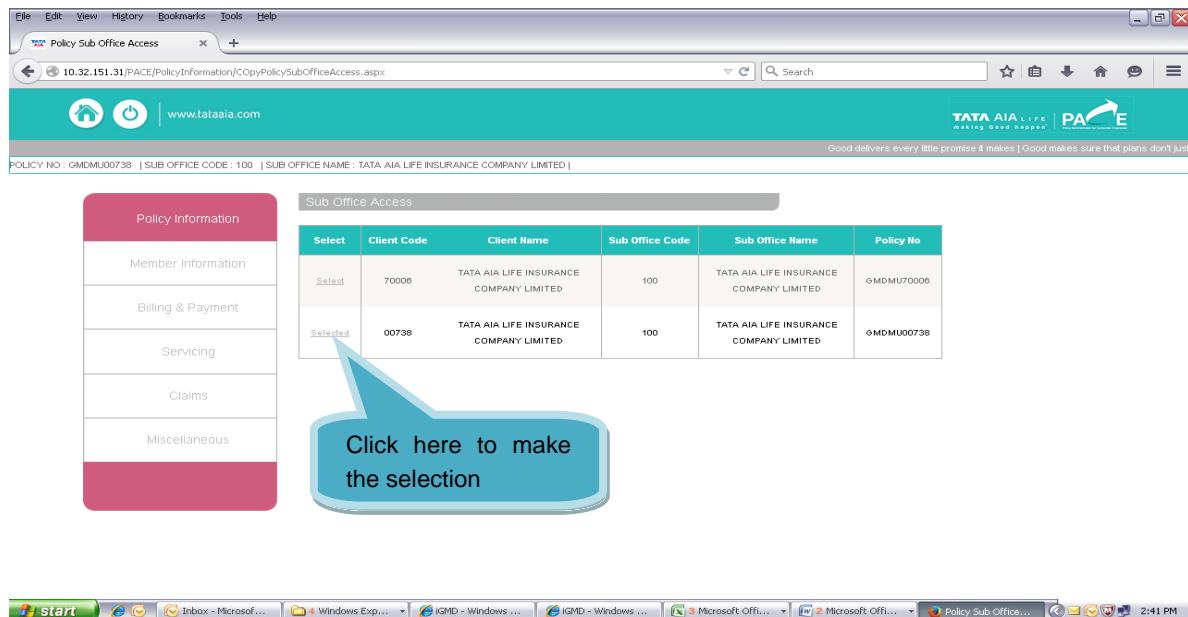


Figure 10: Policy –Policy and Sub office Access (Multiple policy and single sub office)

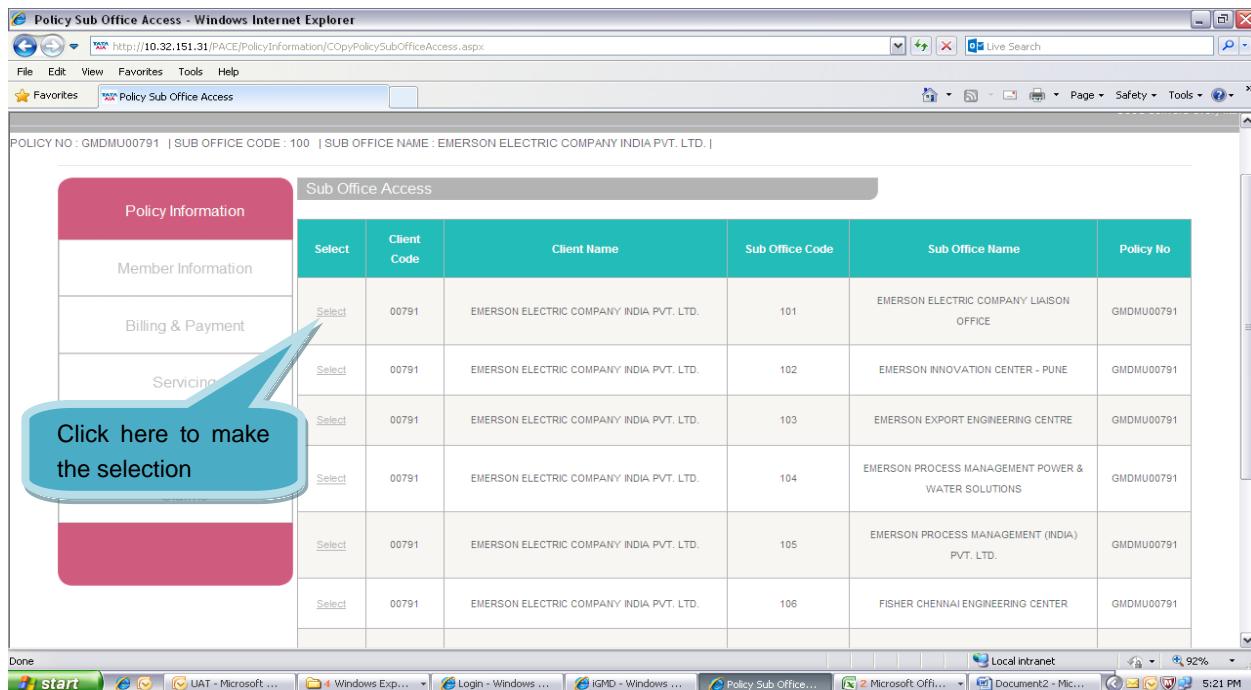


Figure 11: Policy –Policy and Sub office Access (Multiple sub office view)

## 2.2.3 Client Contact Information

In client contact information screen you can view and edit contact information at sub office level. Though user id and password are provided sub office wise, but 100 being admin sub office it will have access to view and edit details of all the other sub office in the policy. But vice versa will not be possible.

View	Sub Office Code	Sub Office Name
	100	TATA AIA LIFE INSURANCE COMPANY LIMITED

Figure 12: Policy -Client Contact Information

On clicking the “View” the below pop up screen comes and it has few editable field were user can update their latest contact person name and contact details.

Please ensure that while updating the details in this field are verified properly and then proceed on saving them, as same details will be used by Tata AIA to communicate with the clients and updating wrong details may lead to access of confidential details like salary, employee name, coverage details etc to unauthorized person.

On below you can updated contact details and save, you can update as many number of time there is change in the details of sub office.

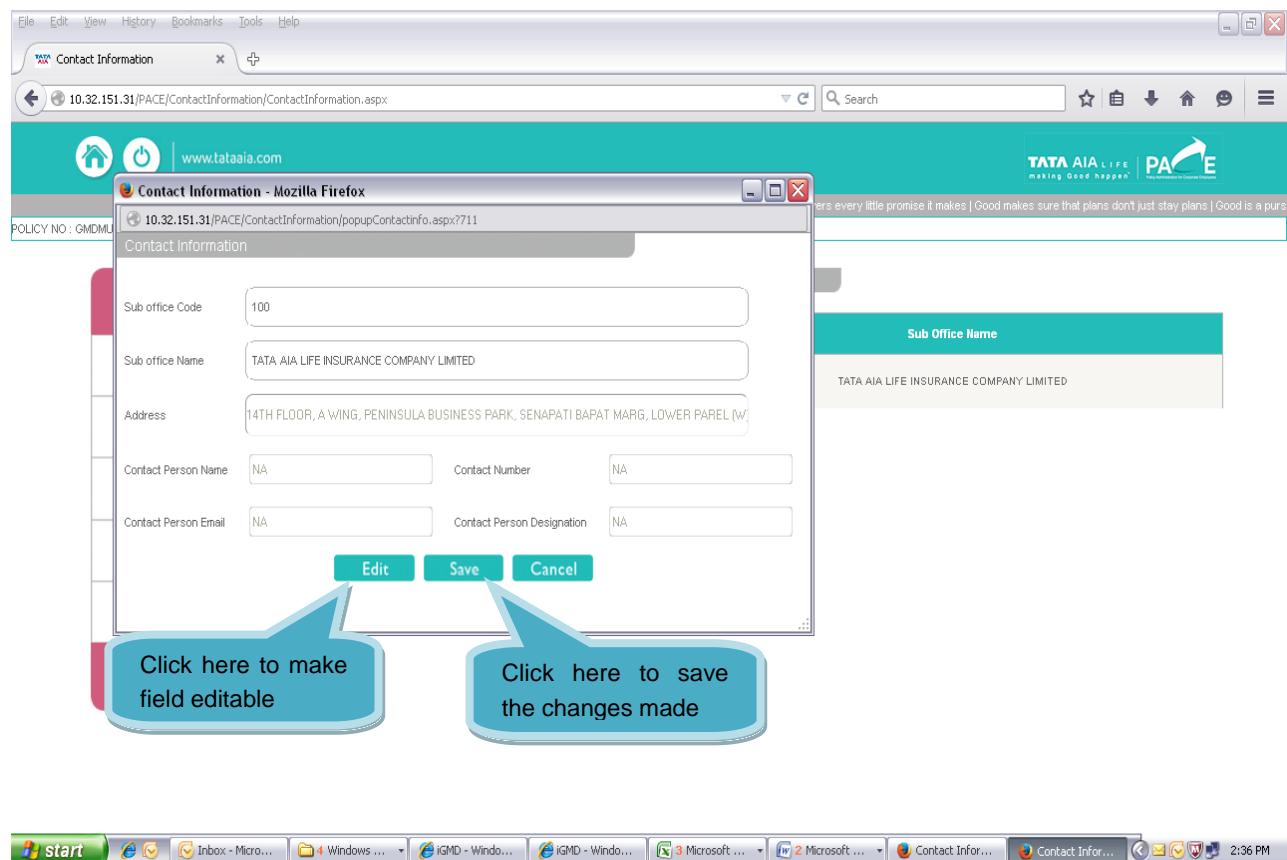


Figure 13: Policy -Contact Details of Sub office

In the page show above you can edit and update the contact details at sub office level as mentioned below:-

- Contact Person Name
- Contact Number
- Contact Person Designation
- Client's Address
- E-Mail

User can update the above details and can view them on real time basis. For editing the details click on "Edit" button after clicking the same, above mentioned field will become editable and details can be updated. Once the details filled click on "Save" to save the details changed.

## 2.2.4 Downloads

Download section provides the options to view some of important policy details as below.

- A. Premium rate
- B. No evidence Limit (NEL)
- C. Benefit Basis

Beside able to view the above information you can also view and download details mentioned below.

- D. Premium Statement
- E. Member listing

User can view and download past and current premium statements or period specific statements basis of date selection. Apart from premium statement one can view and download the member listing of active members.

Please note that premium statement and member listing will be specific to sub office selected.

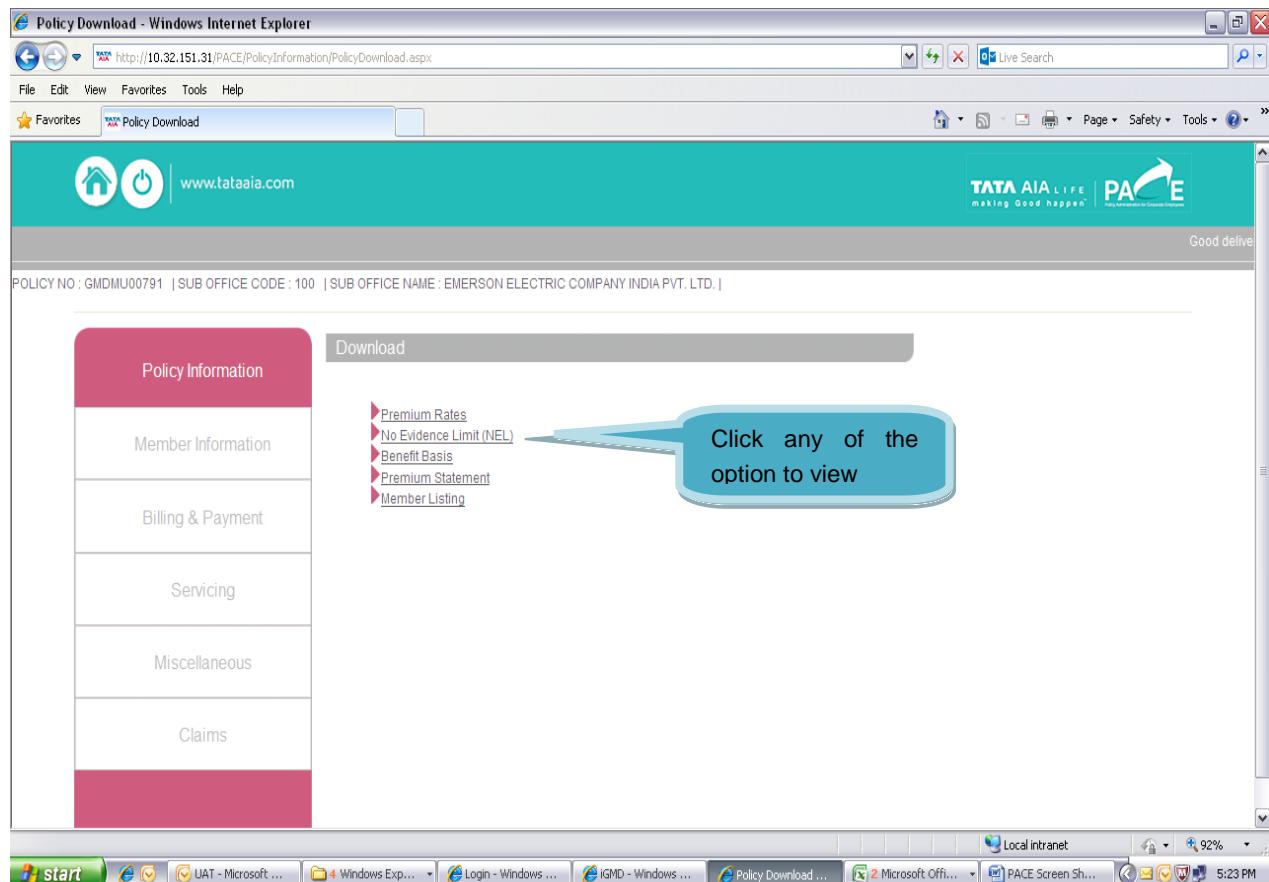


Figure 14: Downloads

## **2.2.4 (A) Premium Rate**

Premium rate section provides the options to view past and current premium rate in policy. Click on "Premium Rate" then new pop up window will open and one can view details as mentioned in screen shot below.

L&C/Mis/02/2016/Feb/082

File Edit View History Bookmarks Tools Help

TATA Policy Download 10.32.151.31/PACE/PolicyInformation/PolicyDownload.aspx

www.tataaia.com

protecting the good in people's lives | Good takes care that love

POLICY NO : GMDDMU00738 | SUB OFFICE CODE : 100 | SU

Policy Information

Member Information

Billing & Payment

Servicing

Claims

Miscellaneous

Premium Rates - Mozilla Firefox

10.32.151.31/PACE/PolicyInformation/PremiumRates.aspx

Premium Rates

Base Unit	Gender	Policy Year	Rate Code
per 1000	Gender Neutral	Dec 2015 - Dec 2016	<a href="#">PR091689</a>
per 1000	Gender Neutral	Dec 2015 - Dec 2016	<a href="#">PR091627</a>
per 1000	Gender Neutral	Dec 2014 - Dec 2015	<a href="#">PR091247</a>

Click here to view rate

AIA LIFE  
it's happened.  
PA  
Protecting the good in people's lives.

ent just happen. It's born out of hard work.

Start

Inbox - Microsoft... Windows Ex... Microsoft Of... Internet Exp... Microsoft Of... Policy Download... Premium Rates... Mail

12:06 PM

Figure 15: Download-Premium Rate

Below screen displays the premium rate.

L&C/Miso2016/Feb/082

The screenshot shows a Firefox browser window with two tabs open. The main tab is titled "Premium Rates - Mozilla Firefox" and displays a table of premium rates for different base units, gender, and policy years. The second tab is titled "Premium Rate - Mozilla Firefox" and displays a report for the rate code PR091669, showing rates for ages 14 to 18. The browser interface includes a search bar, a toolbar with icons, and a status bar at the bottom.

POLICY !

Premium Rates

Base Unit	Gender	Policy Year	Rate Code
per 1000	Gender Neutral	Dec 2015 - Dec 2016	PR091669
per 1000	Gender Neutral		
per 1000	Gender Neutral		

Premium Rate Report

Rate Code	AGE	Tenure	Rate
PR091669	14	1	0.68500
PR091669	15	1	0.68500
PR091669	16	1	0.68500
PR091669	17	1	0.68500
PR091669	18	1	0.68500

1 2 3 ... Last

TATA AIA LIFE making Good happen | PACE

lives | Good takes care that loved ones are always loved | Good understands that it's like to be in other person's sh

Figure 16: Download-Premium Rate displayed

## 2.2.4 (B) No Evidence Limit (NEL)

In “No evidence limit” section user can view particulars about “NEL” of the policy. Click on “NEL” then new pop up window will open and one can view details as mentioned in screen shot below.

No Evidence Limit (NEL)	Policy Year
2700000.00	Dec 2015 - Dec 2016
2700000.00	Jan 2015 - Dec 2015

**Note:** The above mentioned NEL may not be applicable to all members. Kindly refer to policy quotation for further details.

Figure 17: Download-No Evidence Limit (NEL)

Please note that “NEL” mentioned in the screen may not be applicable to all member in the policy therefore request you to please refer to policy quotation for getting the actual NEL details of members.

## 2.2.4 (C) Benefit Basis

In “Benefit Basis” section you can view particulars about what benefit basis you has opted in policy while associating with TATA AIA Life, benefit basis like Salary Multiple, Graded, FSG etc. Click on “Benefit Basis” then new pop up window will open and one can view details as mentioned in screen shot below.

Plan Master Code	View	Cover	Multiple Salary	Cover Type Code	Cover Type Name	Policy Year
P000000032			2.00	Sal	Salary	Dec 2013 - Dec 2015
P000000032			2.00	Sal	Salary	Dec 2014 - Dec 2016
P000000032			2.00	Sal	Salary	Dec 2015 - Dec 2017

**Note:** The above mentioned Benefit Basis may not be applicable to all members. Kindly refer to policy quotation for further details.

Figure 18: Download-Benefit Basis

Also note that for administrative purpose benefit basis has been modified to match the system limitations, for example due to limitation of setting up the FSG calculation in system, same is manually calculated in excel FSG file and final sum assured is input while processing addition and salary change for the member.

## 2.2.4 (D) Premium Statement

In “Premium Statement” section user can view and download “premium statement” of the policy. Click on “Premium Statement” then new pop up window will open and one can view details as mentioned in screen shot below.

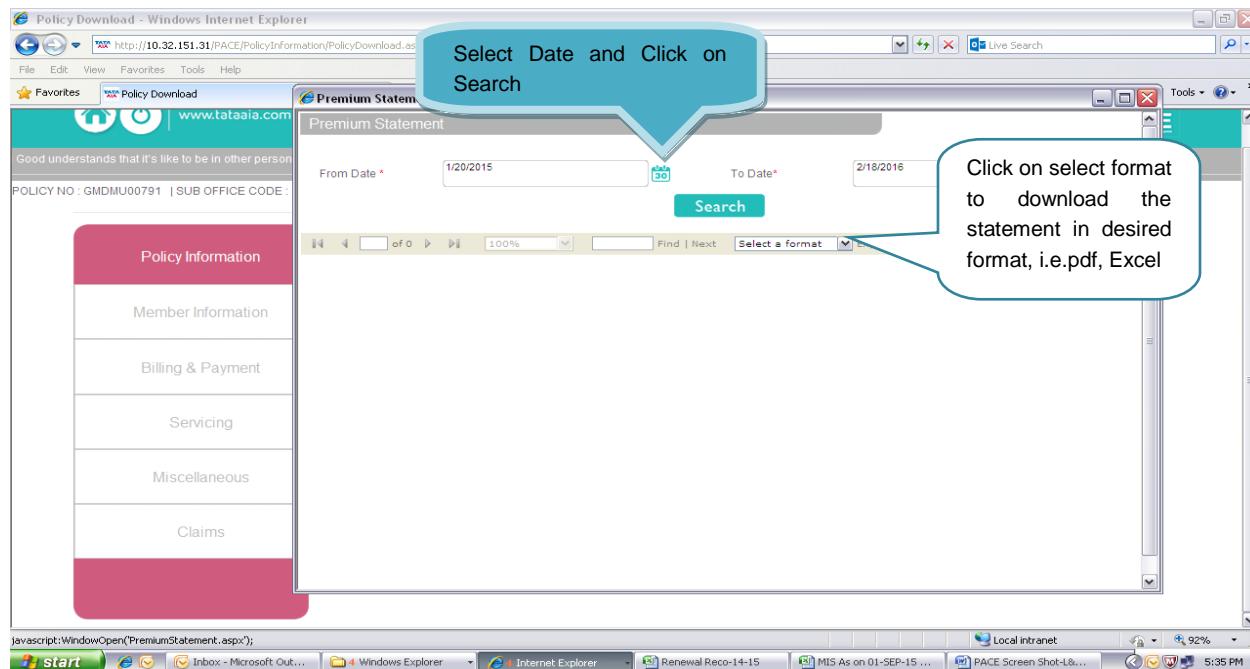


Figure 19: Download-Premium Statement

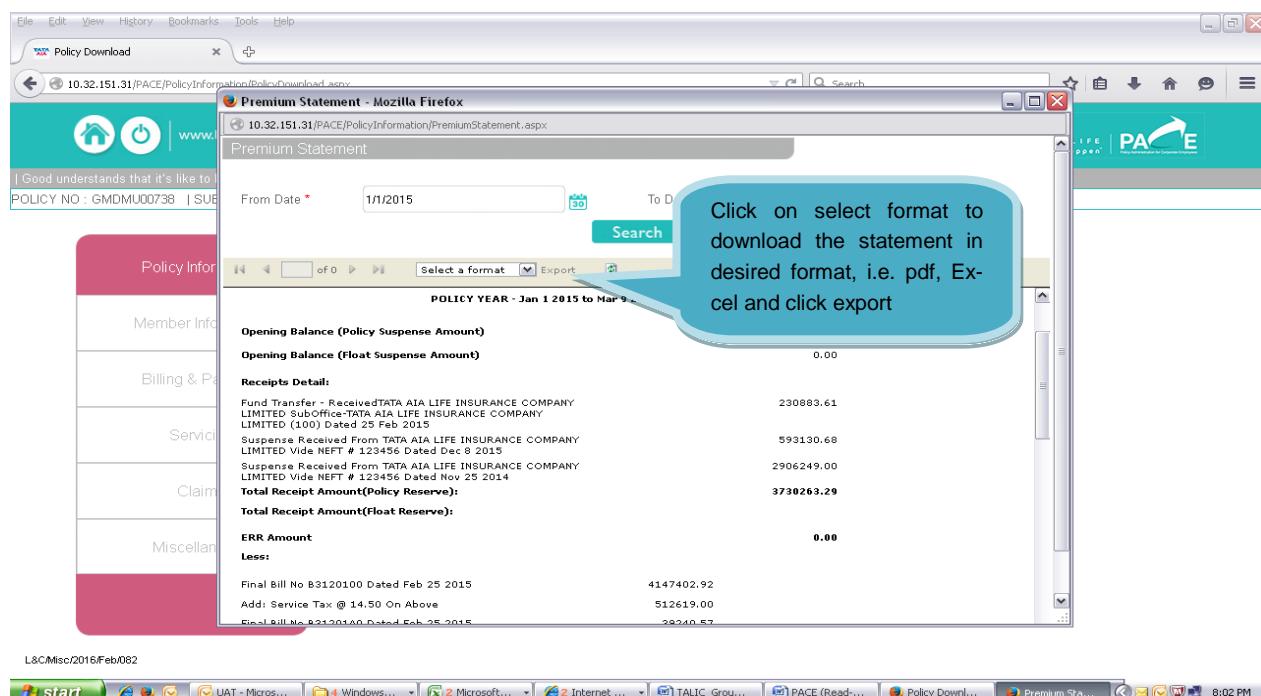


Figure 20: Download-Premium Statement display

## 2.2.4 (E) Member Listing

In “Member Listing” view and download active member list of the policy. Click on “Member listing” then new pop up window will open and then input the desired year and one can view details as mentioned in screen shot below.

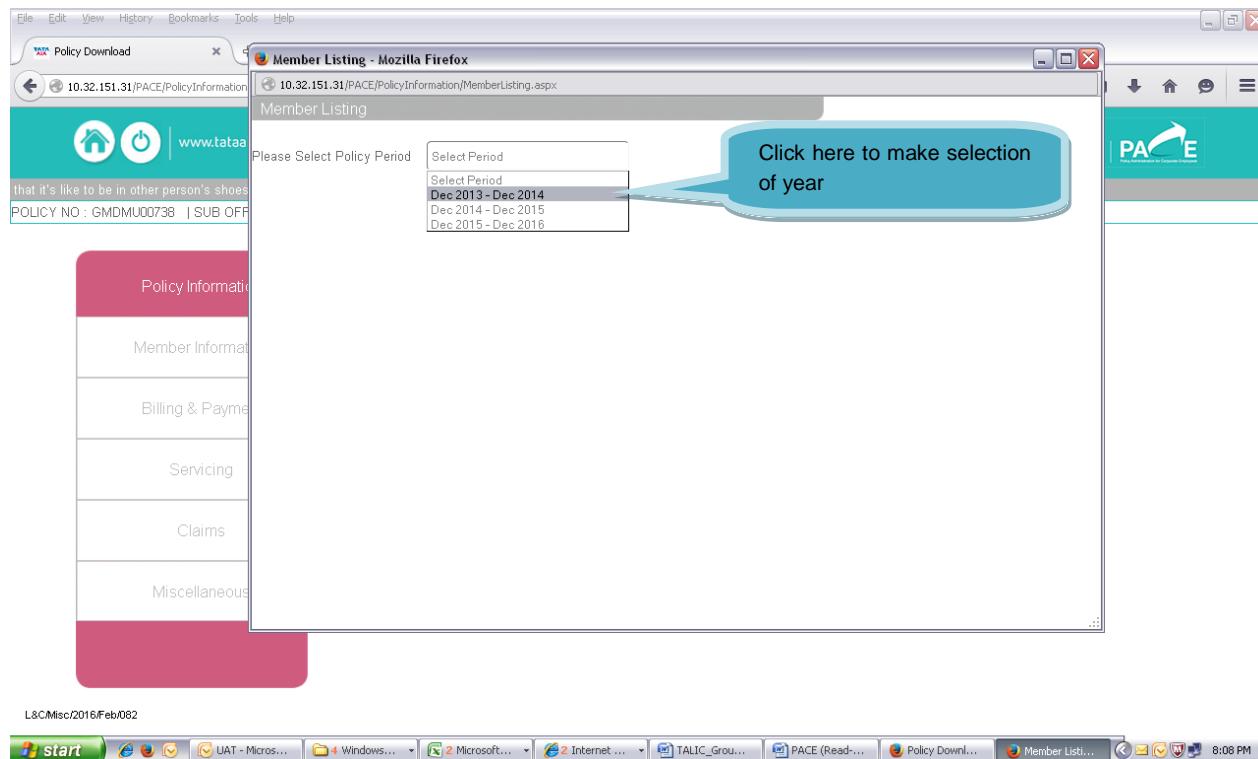


Figure 21: Download-Member Listing

Policy Number	Insured Name	Employee No	COI No.	Inforce Sum Assured	Proposed Sum Assured	NEL	Sub Office Code	Date Of Birth	Gender
GMDMU00791	NILESH PUNTAMBEKAR	'0000010125	1000000058	4401726.34	4401726.34	36994900.00	100	10/19/1978	M
GMDMU00791	BINESH MENON	'00000M2294	1000009878	4734110.00	4734110.00	36994900.00	100	07/30/1978	M
GMDMU00791	KAMLESH PATHAK	'0000010111	1000000044	1867369.12	1867369.12	36994900.00	100	03/12/1977	M
GMDMU00791	RAVIDUTT SHARMA	'0000010073	1000000018	36994900.00	5000000.00	36994900.00	100	07/01/1967	M
	R	'0000010087	1000000032	324523.00	324523.00	36994900.00	100	01/01/1980	

Figure 22: Download-Member Listing

## 2.2.5 Member Information

Member Information section provides comprehensive data about the individual member. These member level details comprises of basic information, coverage, servicing and premium history.

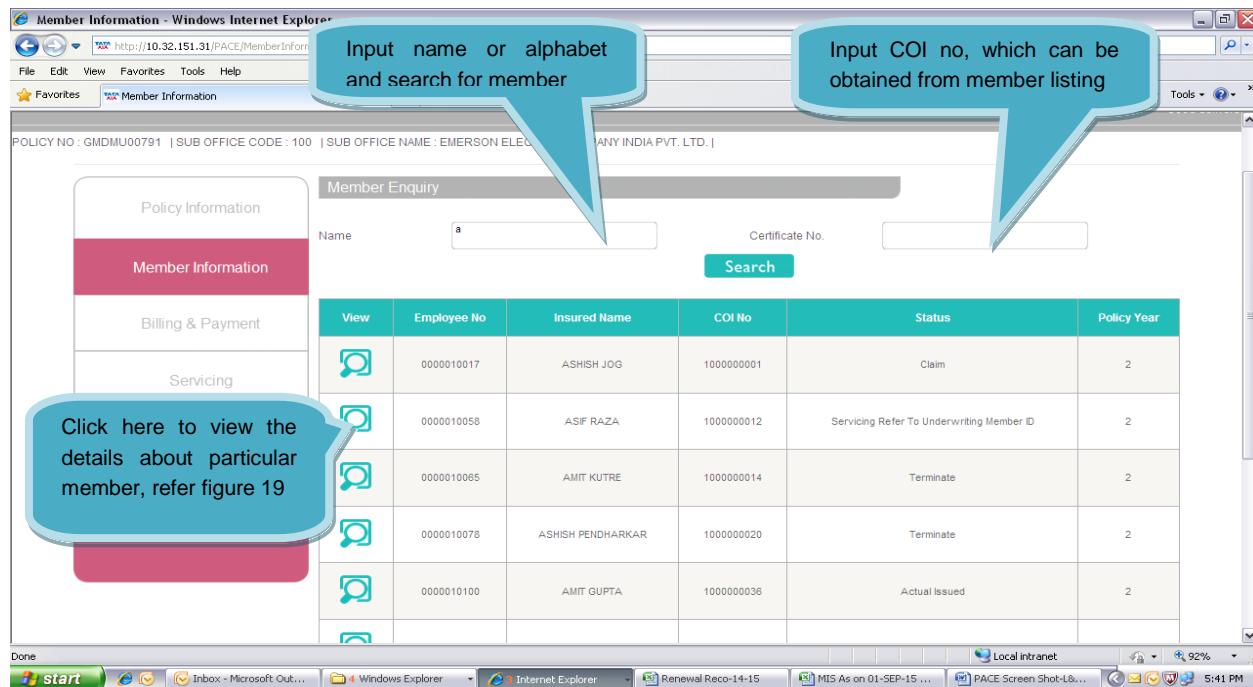


Figure 23: Member Enquiry

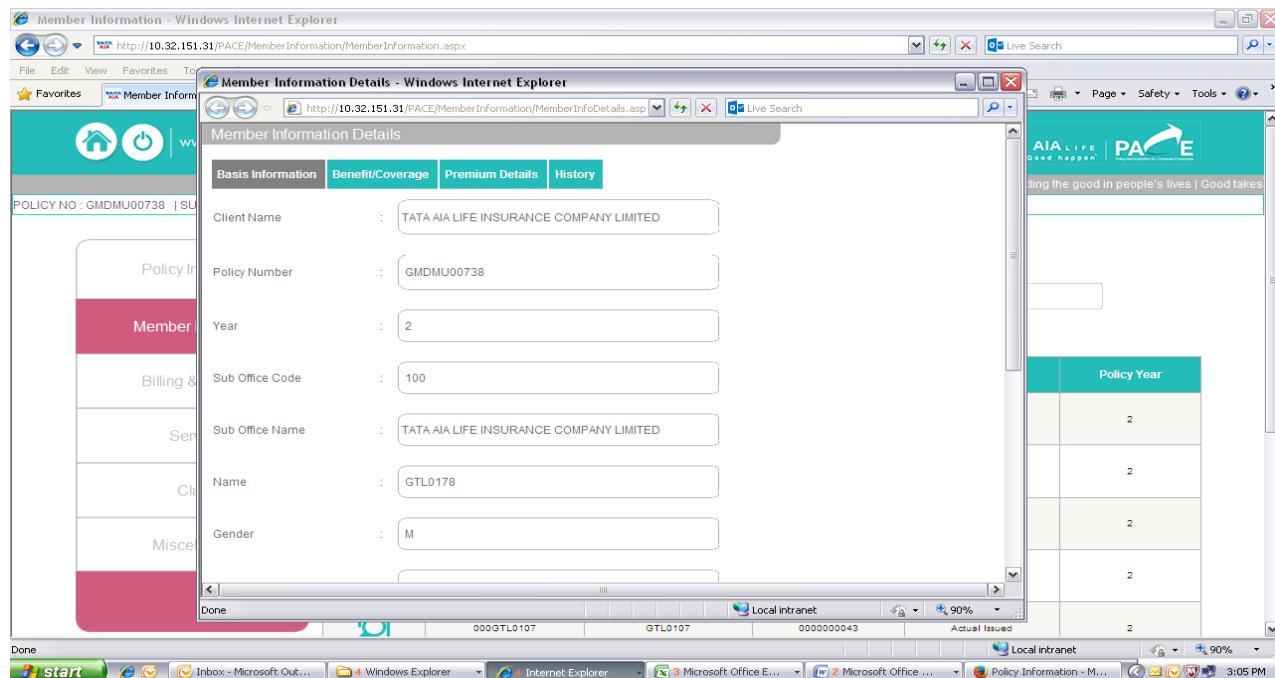


Figure 24: Member Enquiry-Detailed View

## 2.2.5 (A) Basic Information

Basic Information section provides the details of the member like Name, Gender, DOB, Employee Code etc.

The screenshot shows a Microsoft Internet Explorer window with two tabs open. The left tab displays a navigation menu with sections like Policy Info, Member, Billing & Settlement, Sales, Claims, and Miscellaneous. The right tab shows 'Member Information Details' with the following data:

Basic Information		Benefit/Coverage		Premium Details		History	
Client Name	TATA AIA LIFE INSURANCE COMPANY LIMITED	Policy Number	GMDMU00738	Year	2	Sub Office Code	100
Sub Office Name	TATA AIA LIFE INSURANCE COMPANY LIMITED	Name	GTL0178	Gender	M		

A sidebar on the right lists 'Policy Year' from Dec 2015 - Dec 2016. The taskbar at the bottom shows various open applications including Microsoft Office and Internet Explorer.

Figure 25: Member Enquiry-Basic Information

## 2.2.5 (B) Benefit and Coverage

This section gives details about the coverage provided to the member like Inforce sum assured, proposed sum assured, NEL etc.

The screenshot shows a Mozilla Firefox window with the same navigation menu on the left. The right tab shows 'Member Information Details' with the following data:

Basic Information		Benefit/Coverage		Premium Details		History	
		Proposed Sum Assured		NEL		Inforce Sum Assured	
		1000000.00		2700000.00		1000000.00	

A sidebar on the right lists 'Policy Year' from Dec 2015 - Dec 2016. The taskbar at the bottom shows various open applications including Microsoft Office and Internet Explorer.

Figure 26: Member Enquiry-Benefit/Coverage

## 2.2.5 (C) Premium Details

This section gives details about the latest premium details of the member, e.g. if member is added and post his sum assured is changed it will reflect the premium details of sum assured change.

Figure 27: Member Enquiry-Premium Details

## 2.2.5 (D) History

This section gives details about the movement of member servicing and subsequent premium charged.

Status	Policy Year
Issued	2
Terminate	2
Issued	2
Terminate	2

Figure 28: Member Enquiry-History

**Servicing History** – it provide the details of what type of servicing has been done for the member like addition, salary change, name change etc.

COI	Insured Name	Effective Date	Date of Birth	Gender	Employee No	Salary	Member Status	Termination Date
0000000001	GTL0001	06/12/2014	27/09/1969	Male	000GTL0001	0.00	Actual Issued	01/01/2099
0000000001	GTL0001	06/12/2014	27/09/1969	Male	000GTL0001	0.00	Actual Issued	01/01/2099

Figure 29: Member Enquiry-Servicing History

**Premium History** – it provides the details of the premium charged against the each servicing done for the member like addition, salary change, name change etc.

Bill No	COI	Inforce Sum Assured	Gross Premium	Service Tax	Edcess	Bill Days	Policy Year	Bill From Date	Bill To Date
M0000000264	0000000001	1000000.00	958.00	114.96	3.45	365	2	06/12/2014	05/12/2015

Figure 30: Member Enquiry-Premium History

## 2.2.6 Billing and Payment

In this section you can view/download your past and current bills. These bills have premium details till individual member level in the policy. In this section you can view your reserve at overall policy level and sub office level. It also provides facility to pay your bills generated post any servicing done like addition, Sum assured change, etc from your available sub office reserve or float if applicable.

Select	Float	Bill No	Member Count	Gross Premium	Service Tax	Edcess	Bill Amount	Paid Amount	Out
<input type="checkbox"/>	No	A000001969	1	664.25	98.32	0.00	760.57	0.00	
<input type="checkbox"/>	No	M000000497	2581	3622330.45	626244.61	0.00	4147576.06	0.00	

Figure 31: Billing and Payment

**Positive Bill/Invoice** – bill with the positive amount means same need to be paid, post payment of the bill with positive amount your reserve will be reduced by that particular amount. Positive will be generated when below servicing will be done:

- Addition
- Salary change (Increase)
- Designation change (Increase)
- FSG Change (Increase)

**Negative Bill/Invoice** – bill with the negative amount, will be credited to your policy reserve and your policy reserve will increase with the same amount. Negative are generated when below servicing will be done:

- Deletion
- Salary Change (Decrease)
- Designation Change (Decrease)
- FSG Change (Decrease)

## 2.2.6 (A) Bill Enquiry

In this section you can view/download past and current bills. These bills have premium details till individual level in the policy. Therefore it gives advantage to keep the track of premium paid in policy years as well as for the member to, by making date selection you can get the premium details for specified period too.

The screenshot shows the 'Billing Enquiry - Windows Internet Explorer' page. At the top, there are tabs for 'Policy Information' and 'Member Information'. Below these are fields for 'Bill No.', 'Period From' (set to 11/1/2015), and 'Period To' (set to 2/25/2016). A 'Search' button is located to the right of the date fields. A large blue callout bubble points to the search area with the text: 'Input space or Bill no or make selection of dates for viewing bill details'. Another blue callout bubble points to the 'Search' button with the text: 'Click here to download Invoice'. A third blue callout bubble points to the 'Period To' field with the text: 'Click here to download bill level summary in excel Format'. A fourth blue callout bubble points to the 'Bill No.' field with the text: 'Click on bill no to view member wise bill details'. Below the search area is a table with columns: Date, Bill No., Mode, Gross Premium, Loading Premium, Service Tax, EdCess, Paid Amount, and Outstanding Amount. The table contains four rows of data, each with a PDF icon next to the Bill No. The table header is highlighted in teal. The bottom of the screen shows the Windows taskbar with various icons and the time 5:50 PM.

Date	Bill No.	Mode	Gross Premium	Loading Premium	Service Tax	EdCess	Paid Amount	Outstanding Amount
	A000001967	Yearly	-579.90	0.00	-84.09	0.00	-863.99	0.00
	A000001968	Yearly	1270.54	0.00	184.23	0.00	1454.77	0.00
	A000001969	Yearly	664.25	0.00	96.32	0.00	0.00	760.57
	M000000497	Yearly	3622330.45	0.00	525244.61	0.00	0.00	4147575.06

Figure 32: Bill Enquiry

## 2.2.6 (B) Bill Payment

In this section you can view/download make payment of bills. This section also provides details of your available reserves/float at policy and sub office level. You can also download the bill level summary in excel.

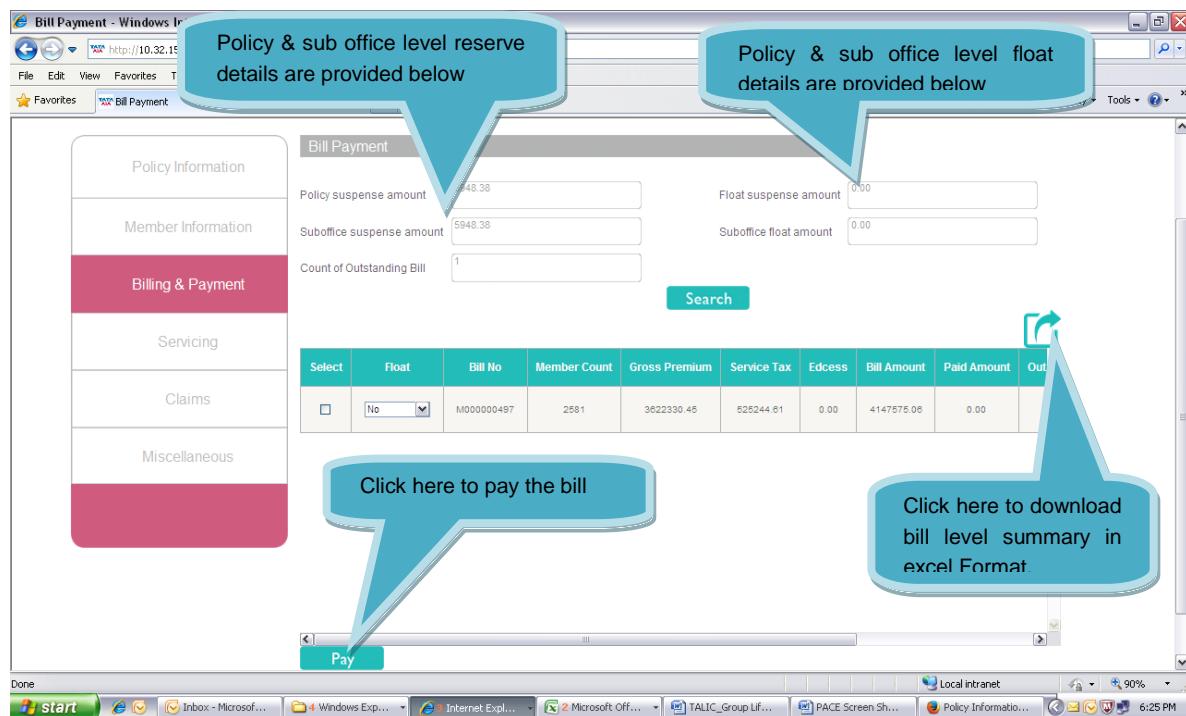


Figure 33: Bill Payment (1)

Post successful payment of your bill you will get message as show below.

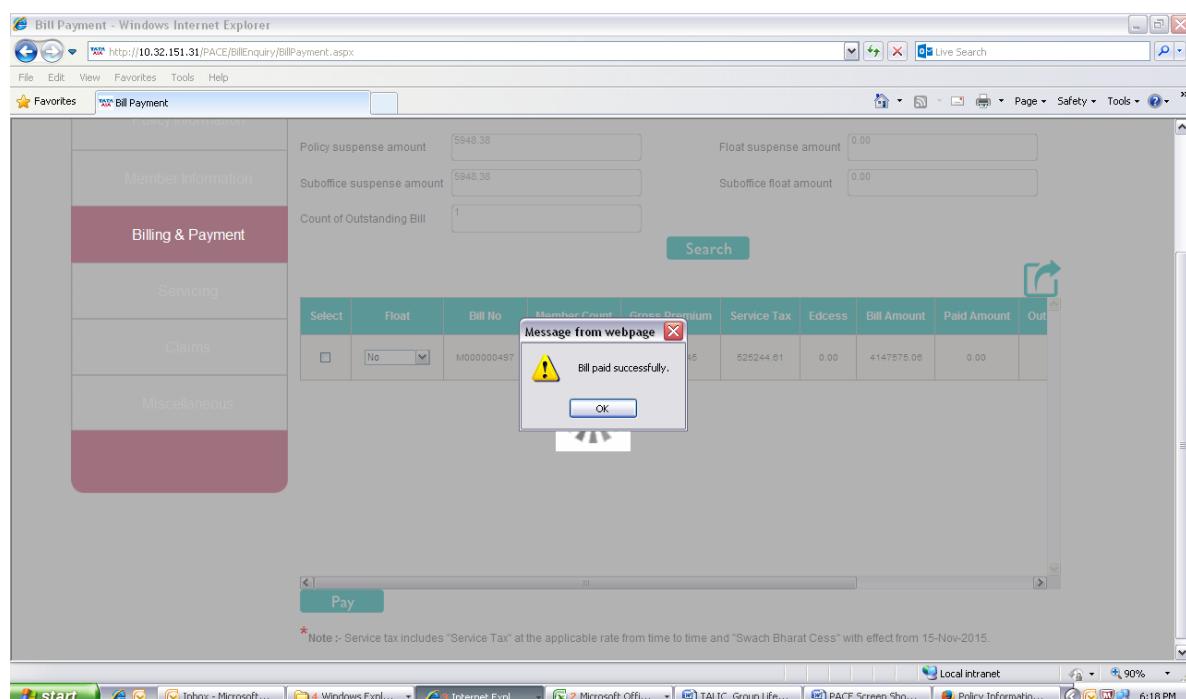


Figure 34: Bill Payment (2)

## 2.2.7 Servicing

This section offers you an option to raise the service the policy, sub office level and also do online member level servicing. Therefore it is has been divided in three sections as mentioned below:-

- Raise a service request:** - By using this option you can raise service request to change the address, name of your policy or sub offices, you can update NEFT details in policy too.
- Online Servicing:** - By using this option you can do online servicing of members in your policy and pay bills after completion of servicing of member. The type of servicing options available are change in name, annual income, sum assured, deletion of member, addition of member, change in FSG, Change in designation etc.
- Request Status Enquiry:** - In this Tab you can view the status of service raised from your side, it will also provide pending requirements raised if any.

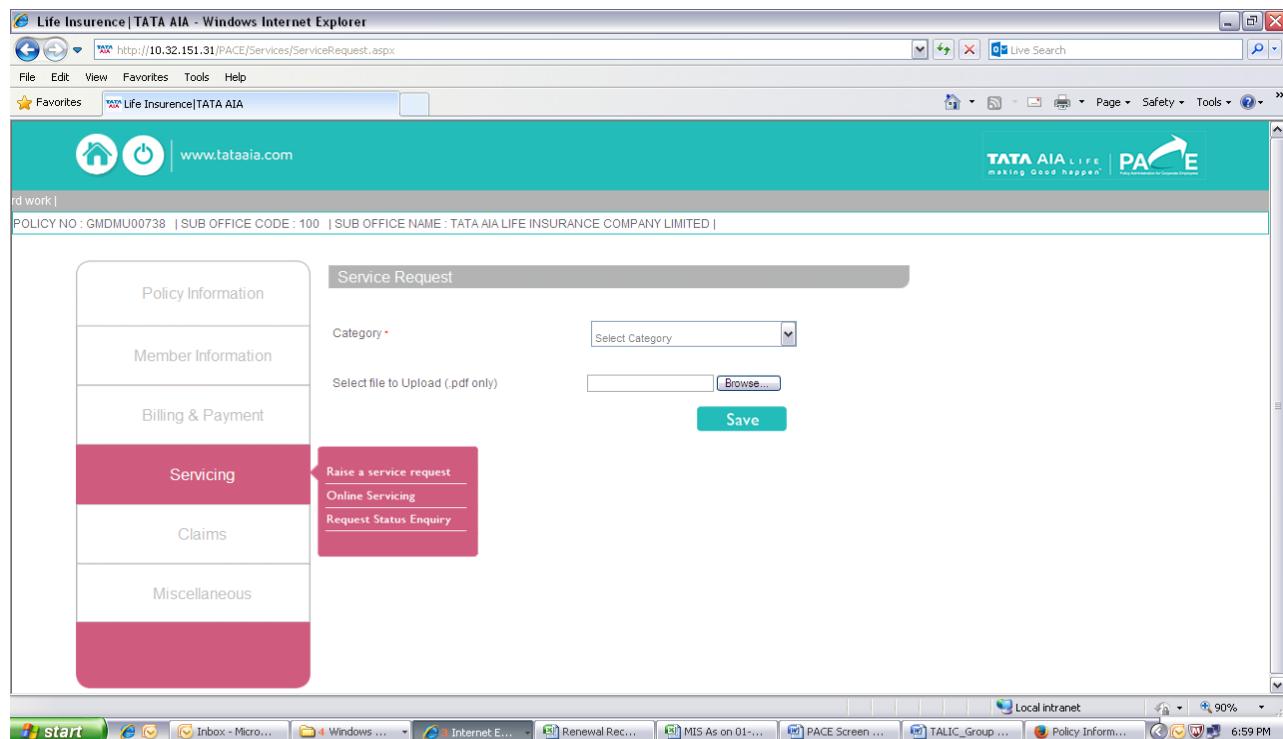


Figure 35: Servicing

## 2.2.7 (A) Raise a Service Request

By using this option you can raise service request at policy and sub office stage to change the address, name of your policy or sub offices, you can update NEFT details in policy too.

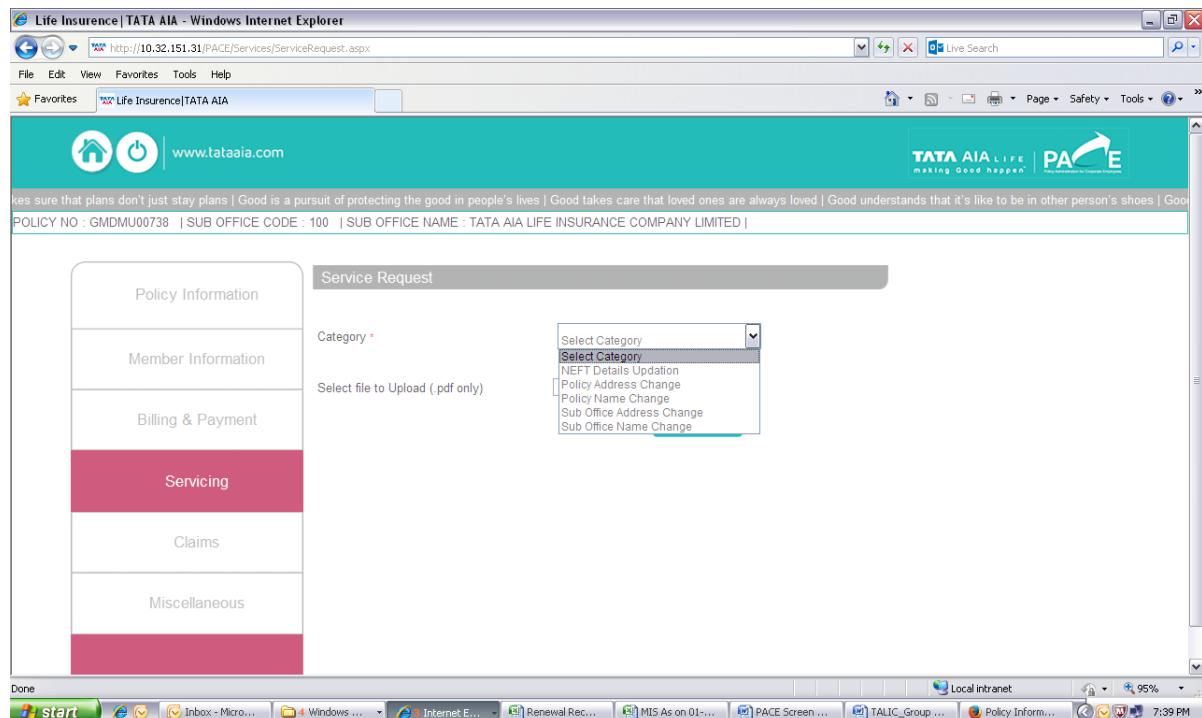


Figure 36: Raise a service request

Below is the stepwise process to raise a service request:-

### **Step-1**

Select applicable option to raise the service request. We are taking “Policy name change” for example.

Select	Name Of Document
<input type="checkbox"/>	Document for Amalgamation / Merger (in case of Amalgamation or Merger of the Company)
<input type="checkbox"/>	Fresh Incorporation Certificate (in case of change of name of the Company)

Figure 37: Raise a service request (1)

## **Step-2**

Prepare the scan copy of requested document for policy name change in “.pdf” format. Upload the same and select the tick box and click on “Save” to raise the request. As shown in screen shot below.

Select	Name Of Document
<input checked="" type="checkbox"/>	Document for Amalgamation / Merger (In case of Amalgamation or Merger of the Company)
<input checked="" type="checkbox"/>	Fresh Incorporation Certificate (In case of change of name of the Company)

Figure 38: Raise a service request (2)

## **Step-3**

On successful upload you will get below message with “Service Request No.” in it, note the request no and click ok to complete the request process and you will be directed to “Service List” on service request status enquiry page, as shown below.

SR No.	SR Date	SR Name	Policy Number	Client Name	Suboffice Code	Suboffice Name	Status	Remark
SR00000059	25/02/2016	Policy Name Change	GMDMU00738	TATA AIA LIFE INSURANCE COMPANY LIMITED	100	TATA AIA LIFE INSURANCE COMPANY LIMITED	New	

Figure 39: Request Status Enquiry

## 2.2.7 (B) Online Servicing

By using this option you can do online servicing of members in your policy and pay bills after completion of servicing of member. The type of servicing options available are change in name, annual income, sum assured, deletion of member, addition of member, change in FSG, Change in designation etc.

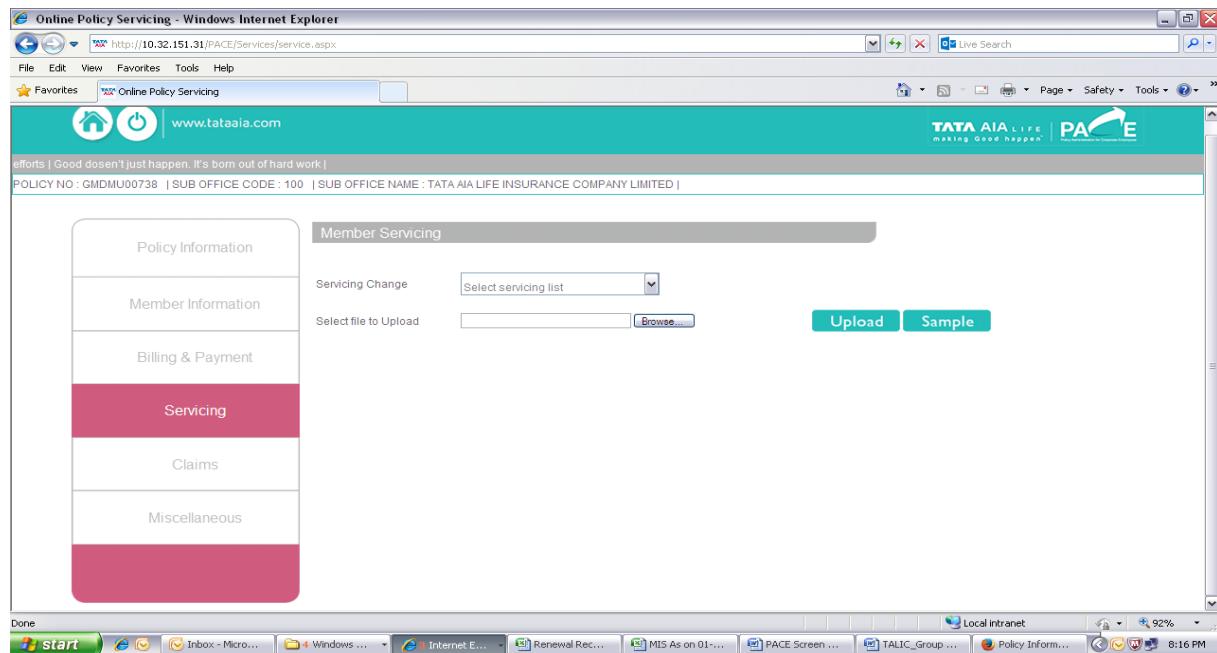


Figure 40: Online servicing page

Below screen shows the type of servicing options, kindly note few servicing options will change from policy to policy due to benefit basis opted in policy during the initiation of it.

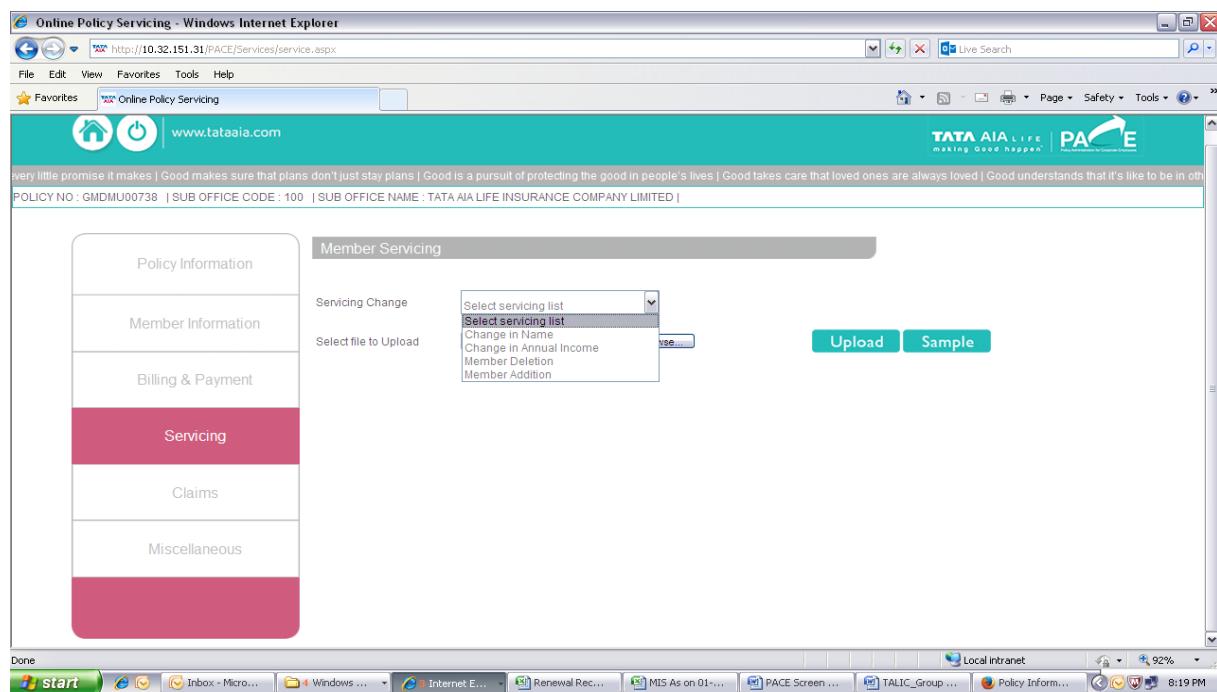


Figure 41: Online Servicing-Servicing Options

## **2.2.8 Online Servicing Process/Steps**

This section helps to understand how to do a various online servicing. Below we have explained the stepwise process to do an online servicing of members. Kindly note that each type servicing has specific upload file which can be downloaded by clicking on “Sample”. Select applicable option to do the member servicing.

### **2.2.8 (A) Member Addition**

By using this option you can add the member into the policy. Below are the steps to add member.

## Step-1

Download the member listing and do reconciliation for members, post reconciliation once you have identified the member to be added .Download the upload format by clicking on “Sample” and fill details in the columns as applicable (explained below). Kindly put date format as mentioned in file.

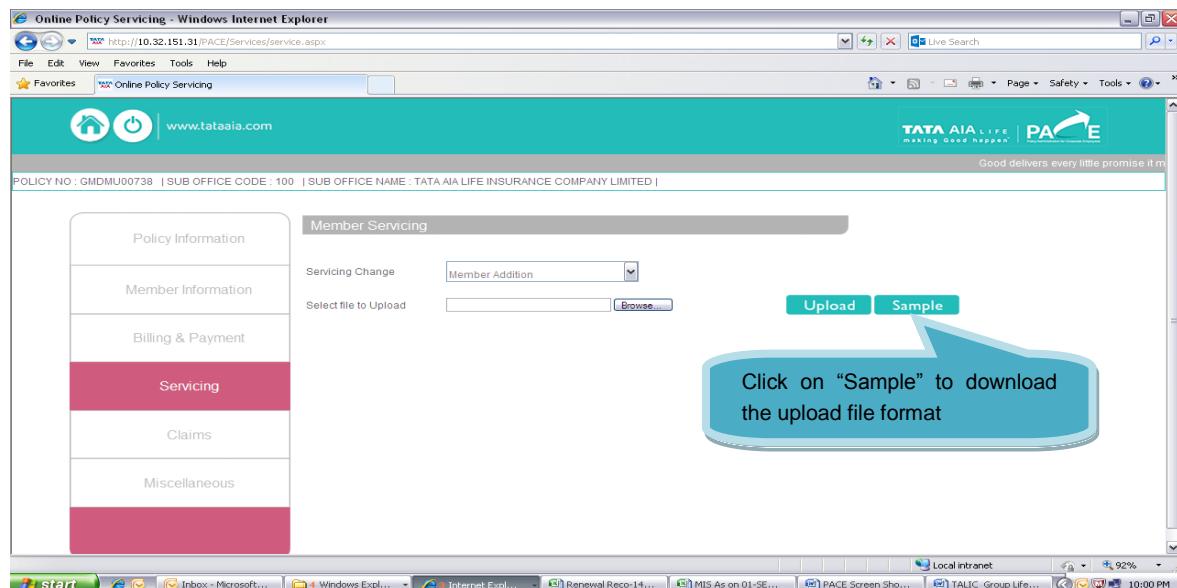
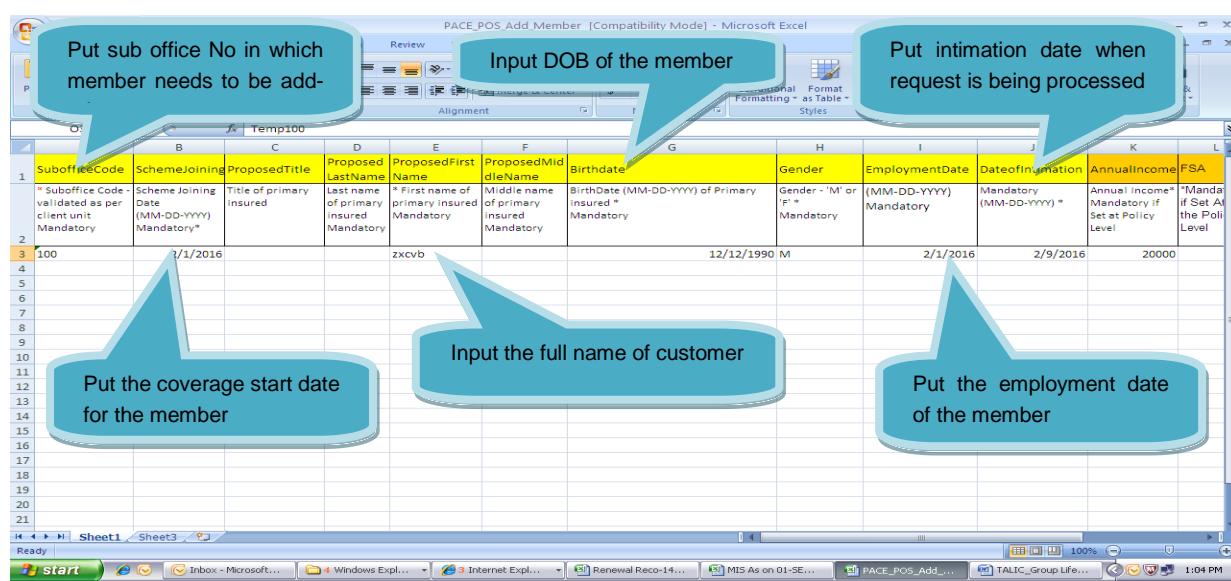


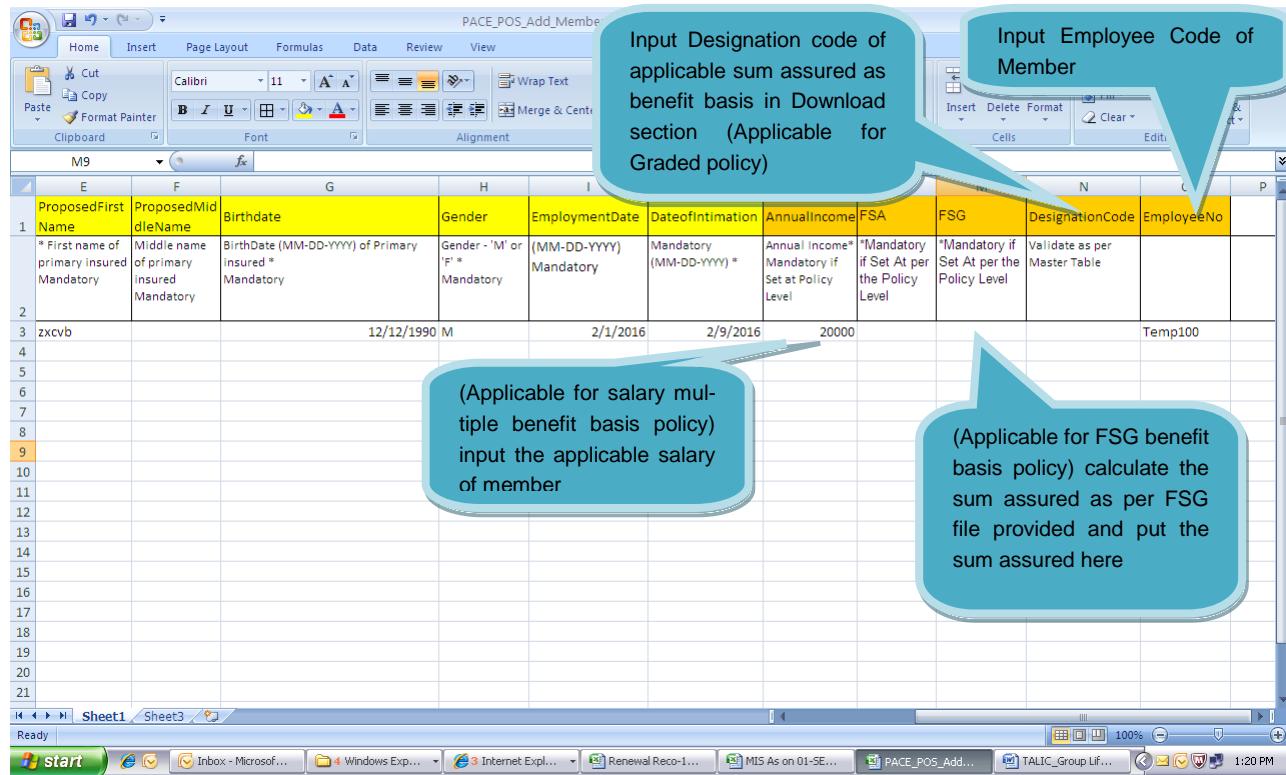
Figure 42: Online Servicing-Member Addition

#### **How to fill the details in upload file:-**

Section-1



## Section-2



## Step-2

Browse the upload file from your PC and click on “Upload” to begin the process. After the process starts it will take you to series of screen displaying various details and it will ask to action by you as shown in coming screen shots.

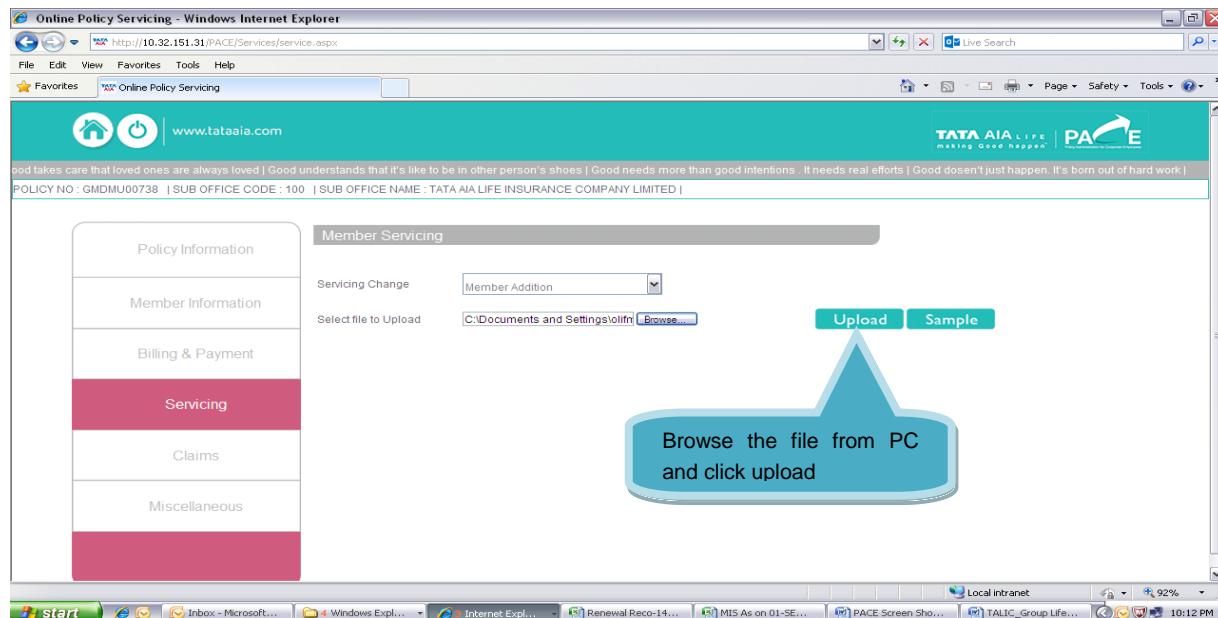


Figure 43: Online Servicing-Member Addition (File upload)

### **Step-3**

After clicking “upload” below screen appears which display the log of details upload by you. There can be four possibilities in view log screen as described below basis the details you have uploaded.

1. **Success** :- When all the details match to specification and member details will reflect under this TAB
2. **Duplicate**:- When there are duplicate details in file like, employee code etc.
3. **Error**: - When a detail uploaded for members are not in specified format, system will display the error type for you to resolve, by clicking the “undo” option. Like date format is wrong “DD/MM/YY” instead of correct date format of “MM/DD/YY”.
4. **Actively at Work (AAW)** :- Details of member will reflect in this TAB only when the members are added beyond the specified period of their joining date i.e. “30 days” . It will be explained separately in details in forthcomings pages.

After checking the details for the members click on ‘confirm’ to proceeding ahead.

ReqStatus	COI	InsuredName	DOB	TransactionID	PolicyNumber	PolicyYear
Accepted	0000006267	zxvb	12/12/1990	20160225221354	GMDDMU00738	3

Figure 44: Online Servicing-Member Addition (Details Uploaded)

## **Step-4**

After clicking “Confirm” below screen appears which display the job run for adding member and display the premium charged for each member uploaded by you. It also shows the unique “COI No” allotted by system to the member; it can be used future for find details about the member on portal.

The screenshot shows a Microsoft Internet Explorer window with the following details:

- Title Bar:** Online Policy Servicing - Windows Internet Explorer
- Address Bar:** http://10.32.151.31/PACE/Services/service.aspx
- Toolbar:** File, Edit, View, Favorites, Tools, Help
- Menu Bar:** Favorites, Online Policy Servicing
- Header:** POLICY NO : GMDMU00738 | SUB OFFICE CODE : 100 | SUB OFFICE NAME : TATA AIA LIFE INSURANCE COMPANY LIMITED | Good delivers every little promise it makes | Good makes sure
- Content Area:**
  - Job:** This section contains a table with member details.
  - Table Headers:** Status, Policy Number, COI, Name, DOB, Cover, Gross Premium, Service Tax, EdCess, Total Premium, TransactionID
  - Table Data:**| Issued | GMDMU00738 | 0000006267 | zxcvb | 12 Dec 1990 | 40000.00 | 23.21 | 3.37 | 0.00 | 26.58 | 20160225221354 |
- Left Sidebar:** Contains links for Policy Information, Member Information, Billing & Payment, Servicing (which is highlighted in red), Claims, and Miscellaneous.
- Bottom Buttons:** Undo, Generate
- Taskbar:** Shows various open windows and the current time (10:15 PM).

Figure 45: Online Servicing-Member Addition (Job Run)

After scrutiny the details for the members click on ‘Generate’ to proceed ahead for generating the bill for the current addition of members. After clicking it take you to next as shown in next step.

## **Step-5**

After clicking “Generate” below screen appears which display the premium calculation for each member uploaded by you. It gives details insight of premium calculation like No. of days, period for which premium is charged, gross premium, service tax etc.

BillID	Bill No	Bill Issued Date	Bill From Date	Bill To Date	Bill Days	Gross Premium	Service Tax	Edcess	Total Amount	Paid A
1	A100000001	09/02/2016	01/02/2016	05/12/2016	308	23.20	3.36	0.00	26.56	0.0

Figure 46: Online Servicing-Member Addition (Bill Generation)

After verifying the premium details for the members click on ‘Issue’ to proceed for issuing the bill for the current addition of members. After clicking it take you to next as shown in next step.

Bill ID	BillID	Bill No	Bill Issued Date	Bill From Date	Bill To Date	Bill Days	Gross Premium	Service Tax	Edcess	Total Amount
	44617	A000001970	09/02/2016	01/02/2016	05/12/2016	308	23.20	3.36	0.00	26.56

Figure 47: Online Servicing-Member Addition (Bill Issuance and Finish)

Finally the bill is issued and you can click on “Finish” to complete the addition process. Then proceed to bill payment TAB and make the payment for bill generated as per bill payment process explained previously.

### **2.2.8 (B) Member Deletion**

By using this option you can delete the member from the policy. Below are the steps to delete member.

## Step-1

Download the member listing and do reconciliation for members, post reconciliation once you have identified the member to be deleted .Download the upload format by clicking on “Sample” and fill details in the columns as applicable (explained below). Kindly put date format as mentioned in file.

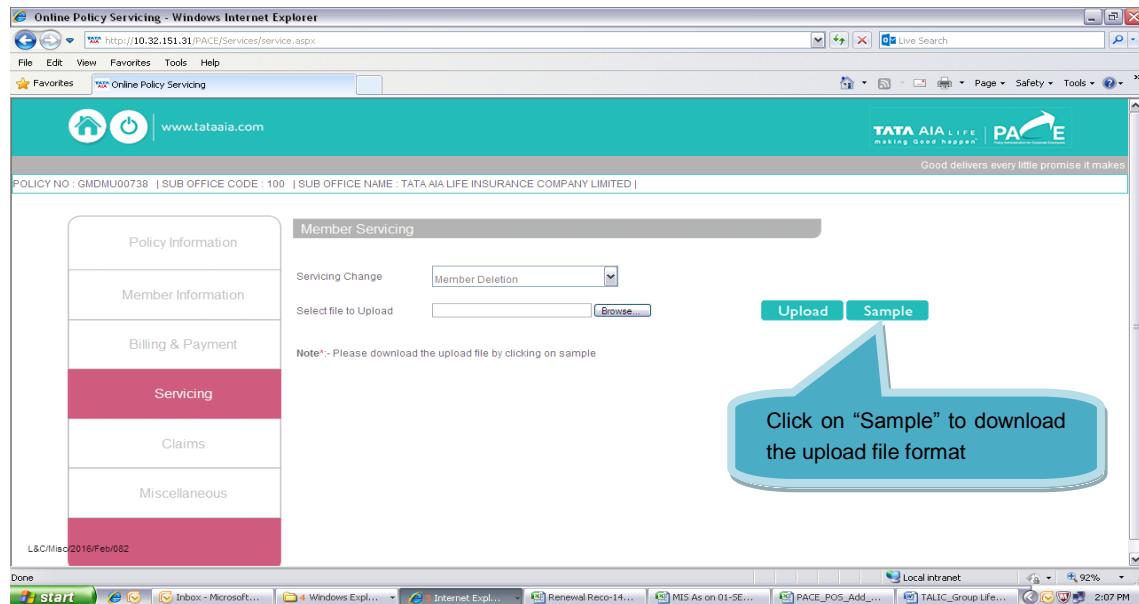
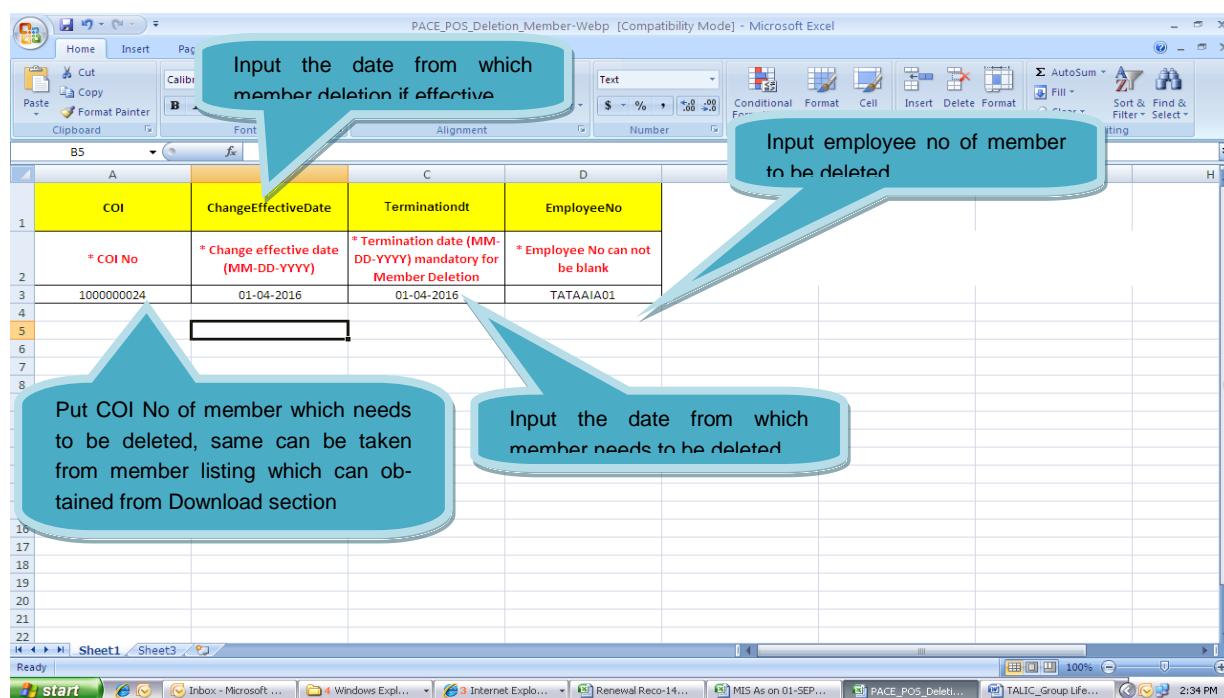


Figure 48: Online Servicing-Member Deletion

### **How to fill the details in upload file:-**

## Section-1



## **Step-2**

Browse upload file from your PC and click on “Upload” to begin the process. After the process starts it will take you to series of screen displaying various details and it will ask to action by you as shown in coming screens

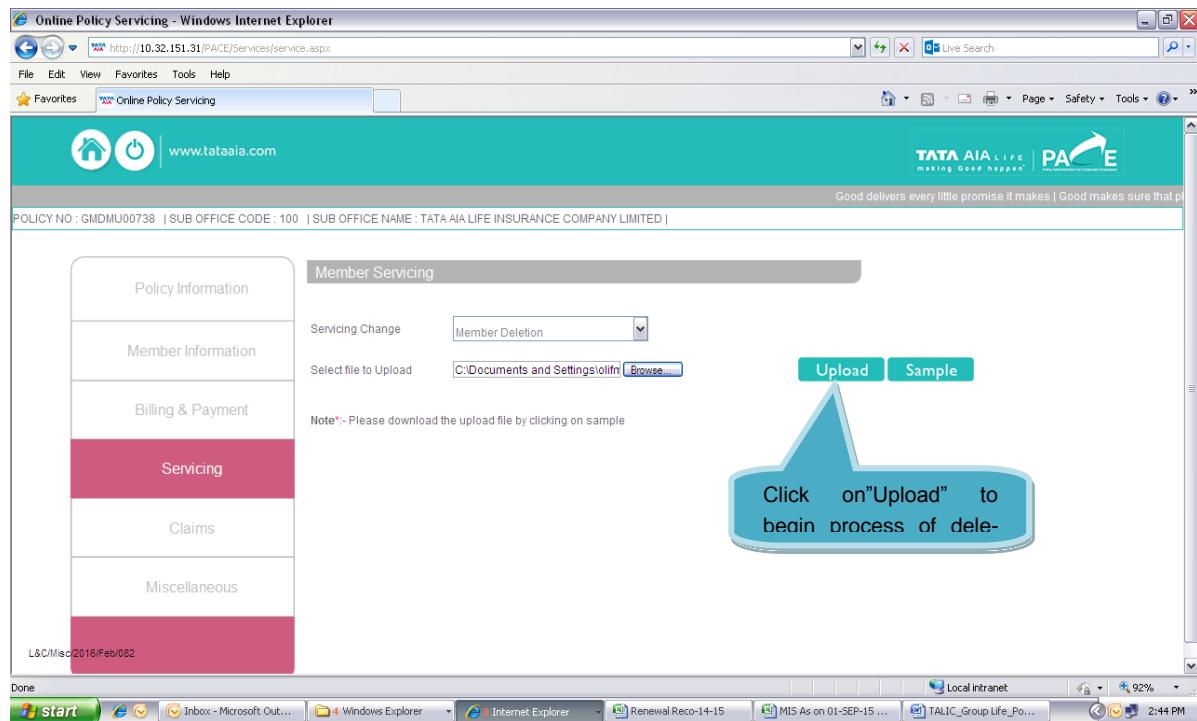


Figure 49: Online Servicing-Member Deletion

## **Step-3**

After clicking “upload” below screen appears which display the log of details upload by you. After verifying the details click “Next”.

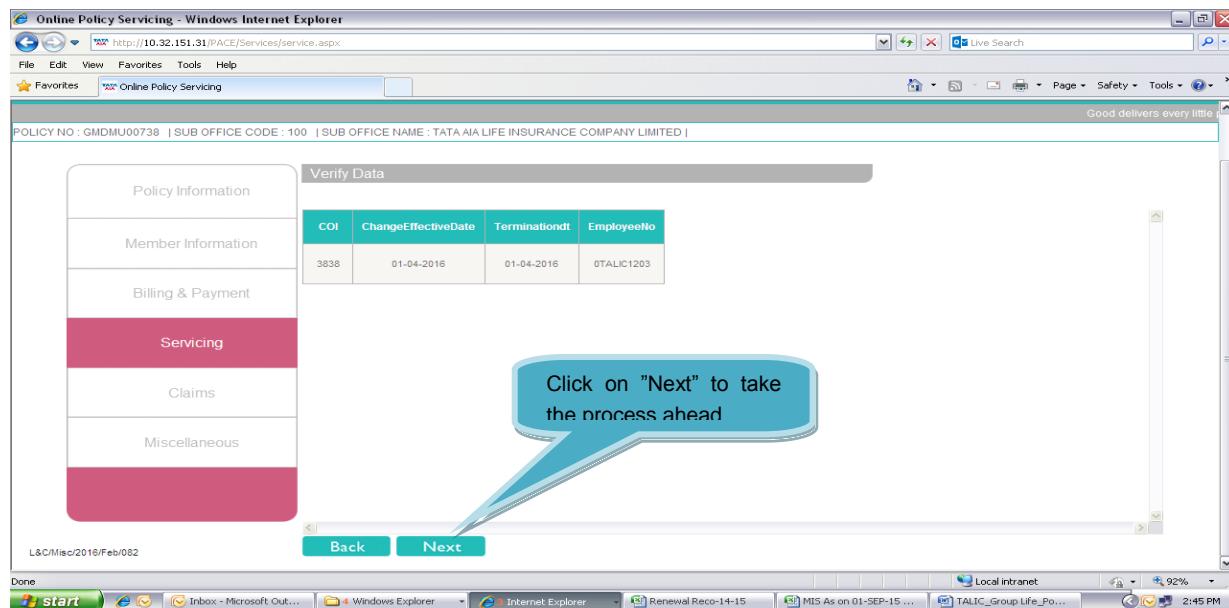


Figure 50: Online Servicing-Member Deletion

## **Step-4**

After clicking “upload” below screen appears which display the log of details upload by you. There can be three possibilities in view log screen as described below basis the details you have uploaded.

1. **Success** :- When all the details match to specification and member details will reflect under this TAB
2. **Duplicate**:- When there are duplicate details in file like, employee code etc.
3. **Error**: - When a detail uploaded for members are not in specified format, system will display the error type for you to resolve, by clicking the “undo” option. Like date format is wrong “DD/MM/YY” instead of correct date format of “MM/DD/YY”.

After checking the details for the members click on ‘confirm’ to proceed ahead.

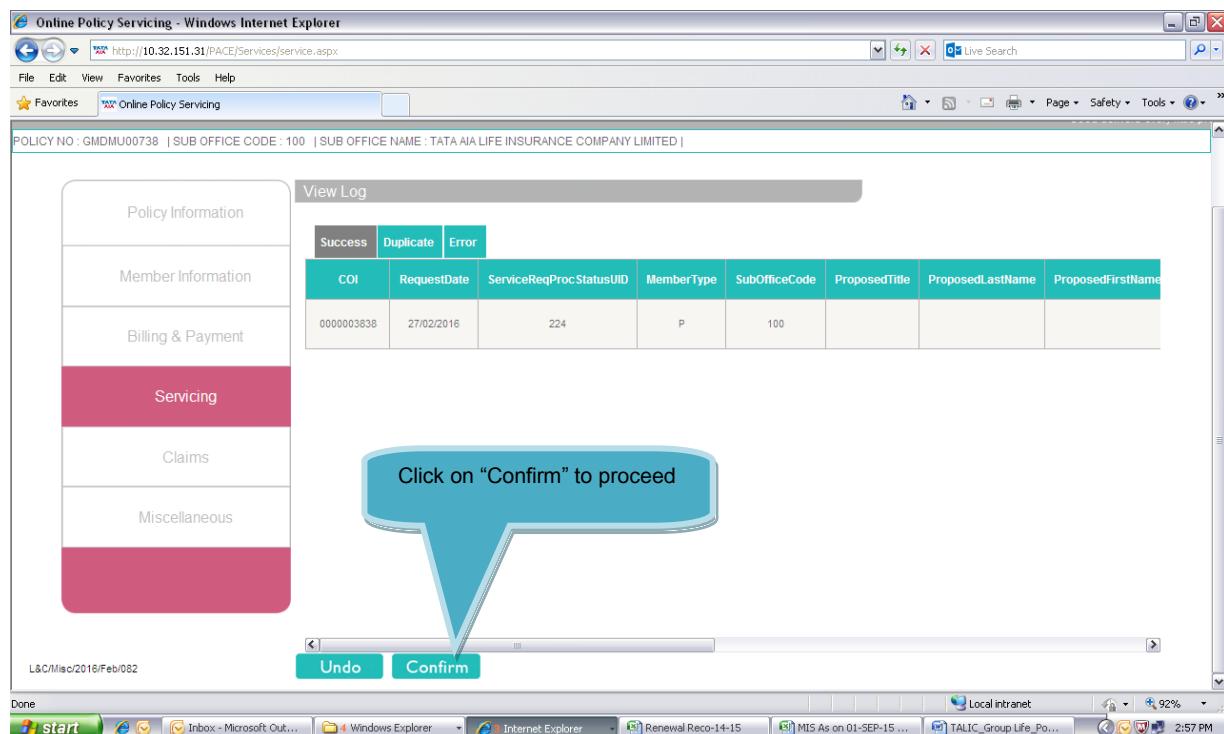


Figure 51: Online Servicing-Member Deletion (Details Uploaded)

## **Step-5**

After clicking “Confirm” below screen appears which display the job run for deletion of members and display the premium refunded for each member uploaded by you. The refunded premium is added to your sub office premium reserve balance.

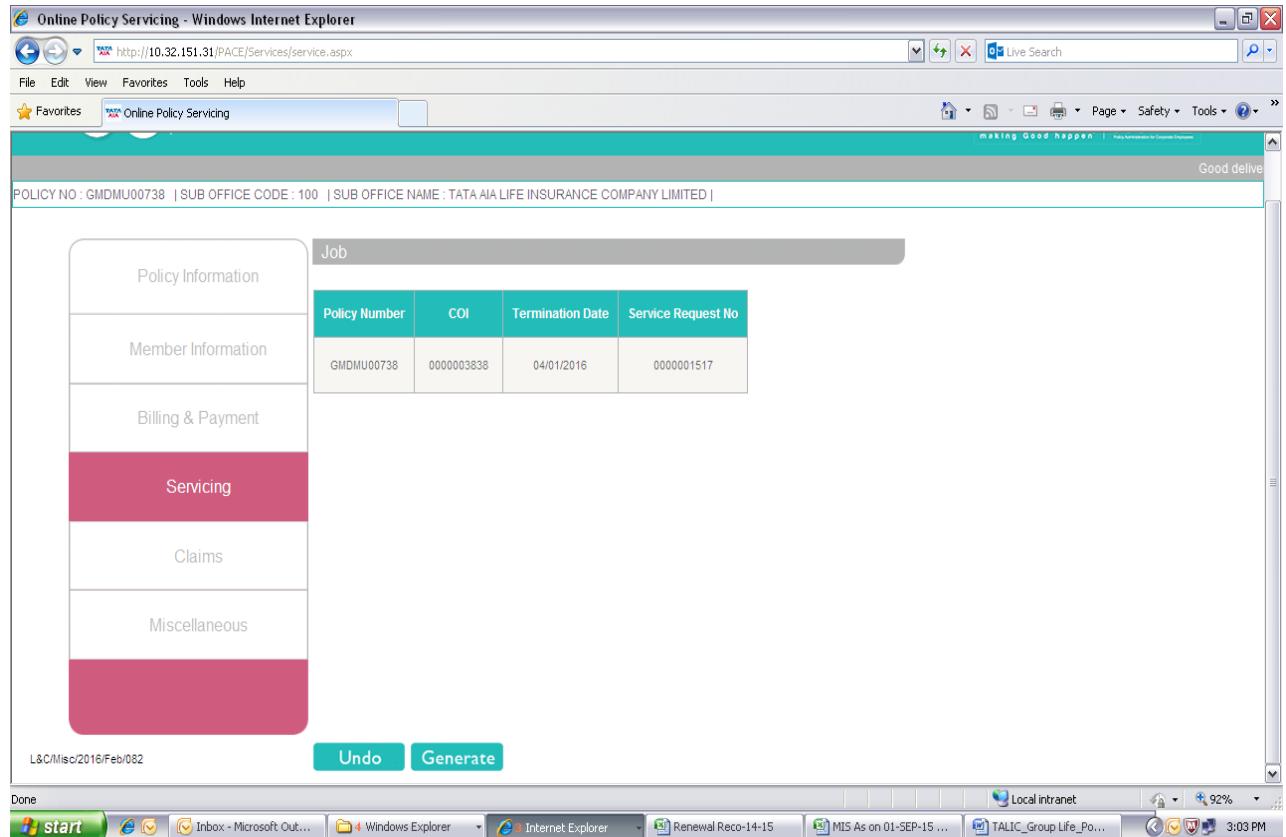


Figure 52: Online Servicing-Member Deletion (Job Run)

After scrutiny the details for the members click on ‘Generate’ to proceed ahead for generating the bill for the deletion of members. After clicking it take you to next as shown in next step.

## **Step-6**

After clicking “Generate” below screen appears which display the refunded premium calculation for each member uploaded by you. It gives details insight of premium calculation like No. of days, period for which premium is refunded, gross premium, service tax etc.

BILL NO	BILL ISSUED DATE	BILL FROM DATE	BILL TO DATE	BILL DAYS	GROSS PREMIUM	SERVICE TAX	EDCESS	TOTAL AMOUNT	Paid Amount
A100000002	09/02/2016	04/01/2016	05/12/2016	336	-632.45	-91.71	0.00	-724.16	0.00

Figure 53: Online Servicing-Member Deletion (Bill Generation)

After verifying the premium details for the members click on ‘Issue’ to proceed for issuing the bill for the current deletion of members. After clicking it take you to next screen as shown below.

BILLID	BILL NO	BILL ISSUED DATE	BILL FROM DATE	BILL TO DATE	BILL DAYS	GROSS PREMIUM	SERVICE TAX	EDCESS	TOTAL AMOUNT
44618	A000001971	09/02/2016	04/01/2016	05/12/2016	336	-632.45	-91.71	0.00	-724.16

Figure 54: Online Servicing-Member Deletion (Bill Issuance and Finish)

Finally the bill is issued and you can click on “Finish” to complete the deletion process. Then proceed to bill payment TAB and make the payment for bill generated as per bill payment process explained previously.

## 2.2.8 (C) Change in Annual Income

By using this option you can increase and decrease the sum assured of members for Policy who have benefit fit basis of "Salary Multiple" like 2 X CTC, 20 times of Basic salary etc. Below are the steps to delete member.

### Step-1

Download the member listing and do reconciliation for members, post reconciliation once you have identified the members for whom salary change is required. Download the upload format by clicking on "Sample" and fill details in the columns as applicable (explained below). Kindly put date format as mentioned in file.

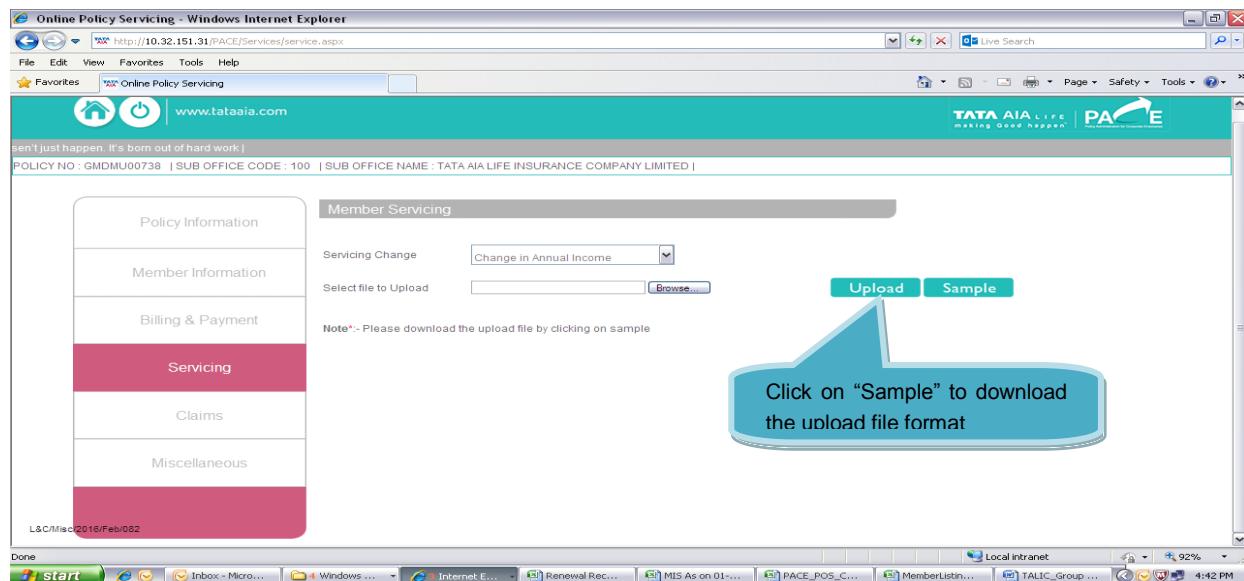


Figure 55: Online Servicing-Change in Annual Income

### How to fill the details in upload file:-

#### Section-1

The screenshot shows a Microsoft Excel spreadsheet titled 'Member2 [Compatibility Mode] - Microsoft Excel'. The spreadsheet has four columns: COI, ChangeEffectiveDate, AnnualIncome, and EmployeeNo. Row 1 contains the column headers. Row 2 contains data: \* COI No, Change effective date (MM-DD-YYYY), \* Annual Income mandatory for Change in annual income, and \* Employee No can not be blank. Row 3 contains the values: 000005862, 01-15-2016, 700000, and OTALIC2378. Four callout bubbles point to specific fields: one to 'COI No' with the text 'Put COI No of member for which salary needs to be change, same can be taken from member listing which can obtained from Download section'; one to 'ChangeEffectiveDate' with the text 'Input the date from which member salary change is effective'; one to 'AnnualIncome' with the text 'Input new salary amount which you want to update in system'; and one to 'EmployeeNo' with the text 'Input employee no of member to be deleted'.

**Step-2**

Browse upload file from your PC and click on “Upload” to begin the process. After the process starts it will take you to series of screen displaying various details and it will ask to action by you as shown in coming screens

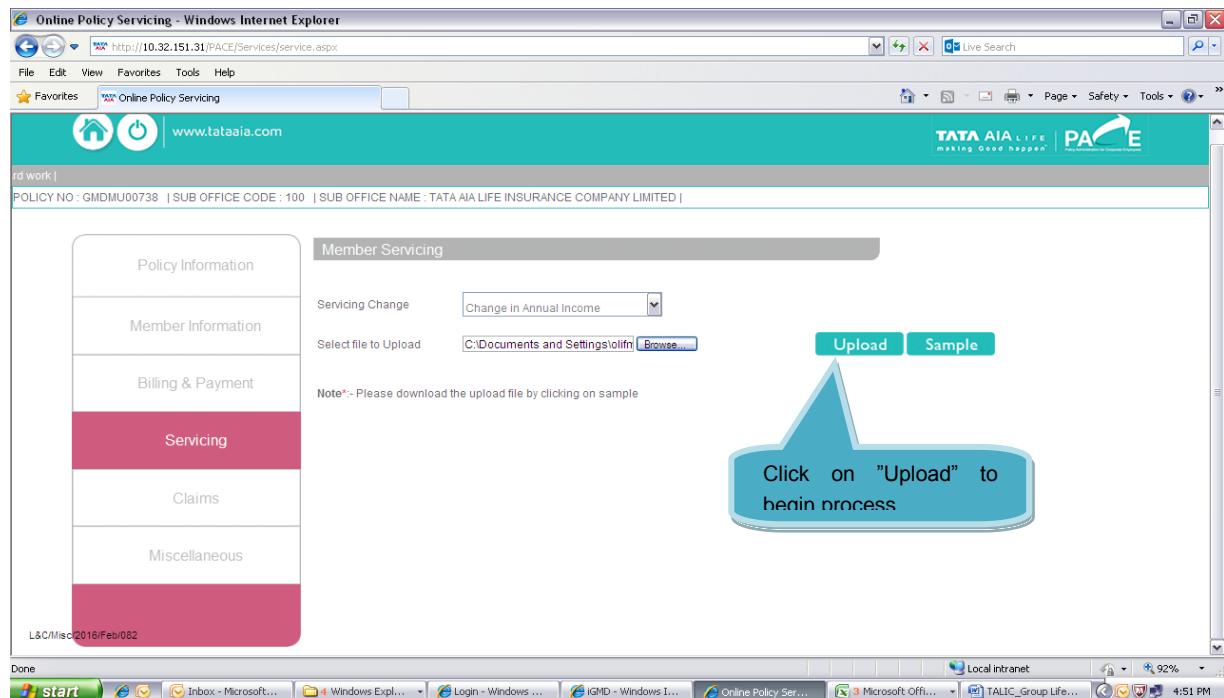


Figure 56: Online Servicing- Change in Annual Income

**Step-3**

After clicking “upload” below screen appears which display the log of details upload by you. After verifying the details click on “Next”.

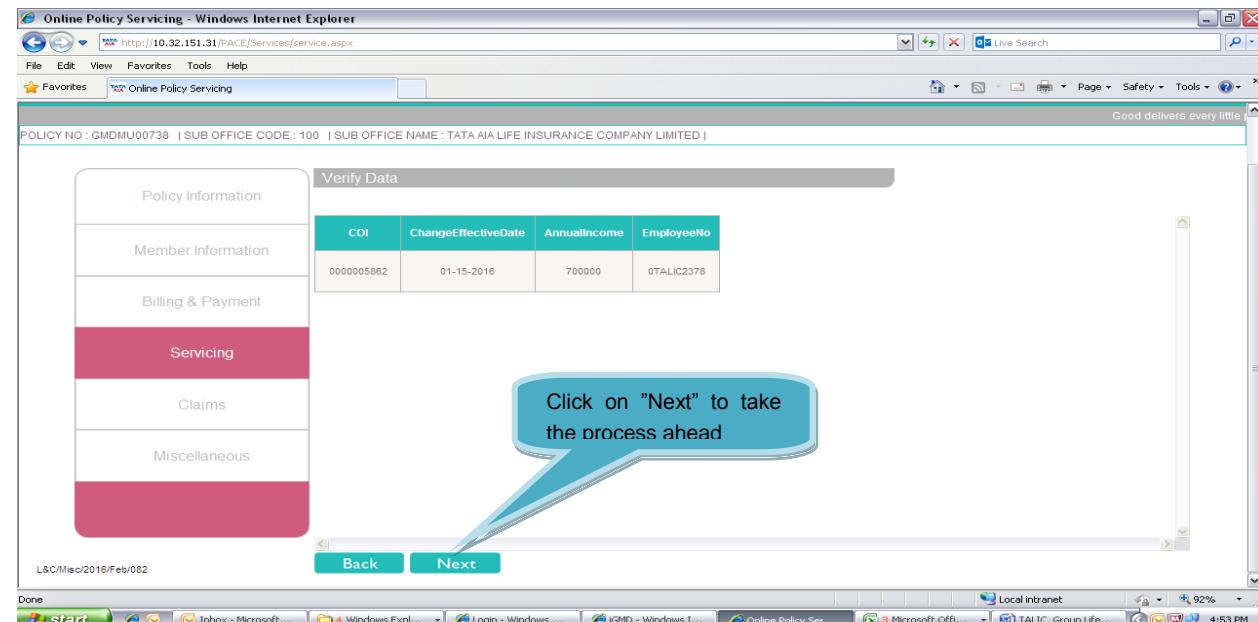


Figure 57: Online Servicing- Change in Annual Income

## **Step-4**

After clicking “upload” below screen appears which display the log of details upload by you. There can be three possibilities in view log screen as described below basis the details you have uploaded.

4. **Success** :- When all the details match to specification and member details will reflect under this TAB
5. **Duplicate**:- When there are duplicate details in file like, employee code etc.
6. **Error**:- When a detail uploaded for members are not in specified format, system will display the error type for you to resolve, by clicking the “undo” option. Like date format is wrong “DD/MM/YY” instead of correct date format of “MM/DD/YY”.

After checking the details for the members click on ‘confirm’ to proceed ahead.

The screenshot shows a Windows Internet Explorer window titled "Online Policy Servicing - Windows Internet Explorer". The URL is http://10.32.151.31/PACE/Services/service.aspx. The page displays a "View Log" table with the following data:

COI	RequestDate	MemberType	DesignationCode	AnnualIncome	FSA	FSG	TransactionID
0000004934	27/02/2016	P		700000			20160227170001

A vertical sidebar on the left contains links: Policy Information, Member Information, Billing & Payment, Servicing (highlighted in red), Claims, and Miscellaneous. At the bottom of the sidebar, it says "L&C/Misc/2016/Feb/082". At the bottom of the main content area, there are "Undo" and "Confirm" buttons. A blue callout bubble with the text "Click on 'Confirm' to proceed" points to the "Confirm" button.

Figure 58: Online Servicing- Change in Annual Income

## **Step-5**

After clicking “Confirm” below screen appears which display the job run for salary change of members and display the premium charged for each member uploaded by you.

The screenshot shows a Microsoft Internet Explorer window titled "Online Policy Servicing - Windows Internet Explorer". The URL is "http://10.32.151.31/PACE/Services/service.aspx". The page header includes "making Good happen" and "Good delivers every little". A navigation bar at the top has links for File, Edit, View, Favorites, Tools, and Help. Below the header, there's a banner with the text "POLICY NO : GMDMU00738 | SUB OFFICE CODE : 100 | SUB OFFICE NAME : TATA AIA LIFE INSURANCE COMPANY LIMITED |". On the left, a sidebar menu lists "Policy Information", "Member Information", "Billing & Payment", "Servicing" (which is highlighted in red), "Claims", and "Miscellaneous". The main content area is titled "Job" and contains a table with the following data:

Policy Number	COI	NewNEL	NewAppliedCover	NewSumAssured	TerminationDate	ServiceReqNo	CreatedBy
GMDMU00738	0000004934	2700000.00	1400000.00	1400000.00	1/15/2016 12:00:00 AM	0000001518	59

At the bottom of the main content area, there are "Undo" and "Generate" buttons. The status bar at the bottom of the browser window shows "L&C/Misc/2016/Feb/082" and the system date/time as "5:02 PM".

Figure 59: Online Servicing- Change in Annual Income (Job Run)

After scrutiny the details for the members click on ‘Generate’ to proceed ahead for generating the bill for the salary change of members. After clicking it take you to next as shown in next step.

## **Step-6**

After clicking “Generate” below screen appears which display the premium calculation for each member uploaded by you. It gives details insight of premium calculation like No. of days, period for which premium is refunded, gross premium, service tax etc.

Bill No	Bill Issued Date	Bill From Date	Bill To Date	Bill Days	Gross Premium	Service Tax	Edcess	Total Amount	Paid Amount
A100000001	09/02/2016	15/01/2016	06/12/2016	326	245.47	35.59	0.00	281.06	0.00

Figure 60: Online Servicing- Change in Annual Income (Bill Generation)

After verifying the premium details for the members click on ‘Issue’ to proceed for issuing the bill for the current salary change of members. After clicking it take you to next screen as shown below.

Bill No	Bill Issued Date	Bill From Date	Bill To Date	Bill Days	Gross Premium	Service Tax	Edcess	Total Amount	Paid Amount
A000001972	09/02/2016	15/01/2016	06/12/2016	326	245.47	35.59	0.00	281.06	0.00

Figure 61: Online Servicing- Change in Annual Income (Bill Issuance and Finish)

Finally the bill is issued and you can click on “Finish” to complete the deletion process. Then proceed to bill payment TAB and make the payment for bill generated as per bill payment process explained previously.

## **2.2.8 (D) Change in Name**

By using this option you can change the name of members in policy.

## Step-1

Download the member listing and do reconciliation for members, post reconciliation once you have identified the members for whom name change is required. Download the upload format by clicking on “Sample” and fill details in the columns as applicable (explained below). Kindly put date format as mentioned in file.

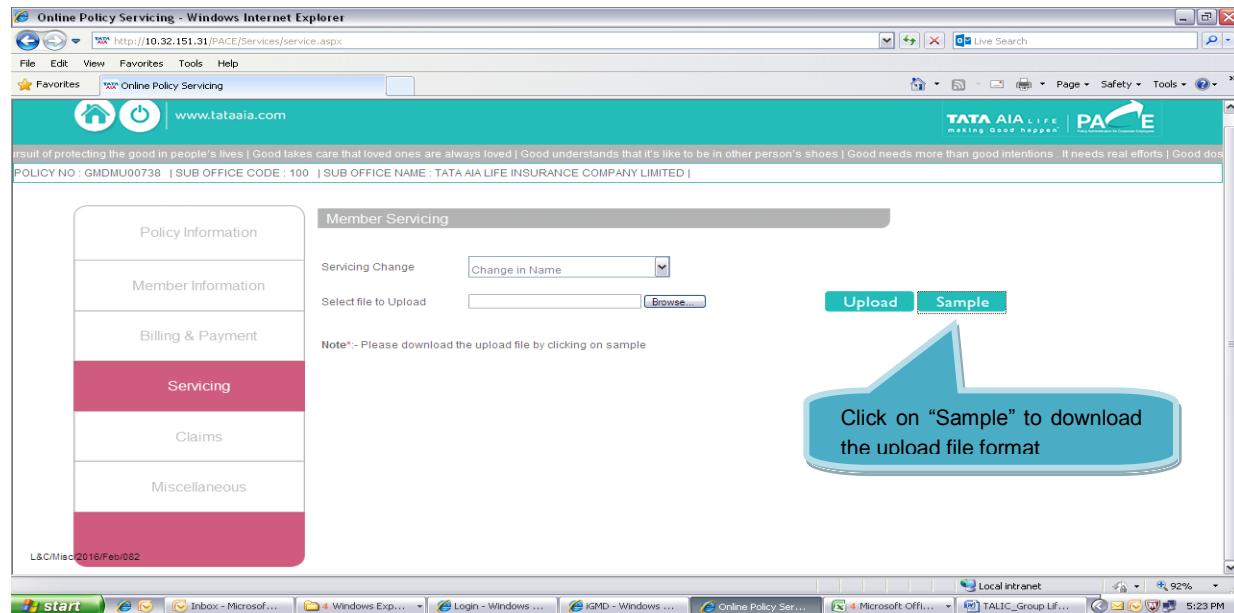
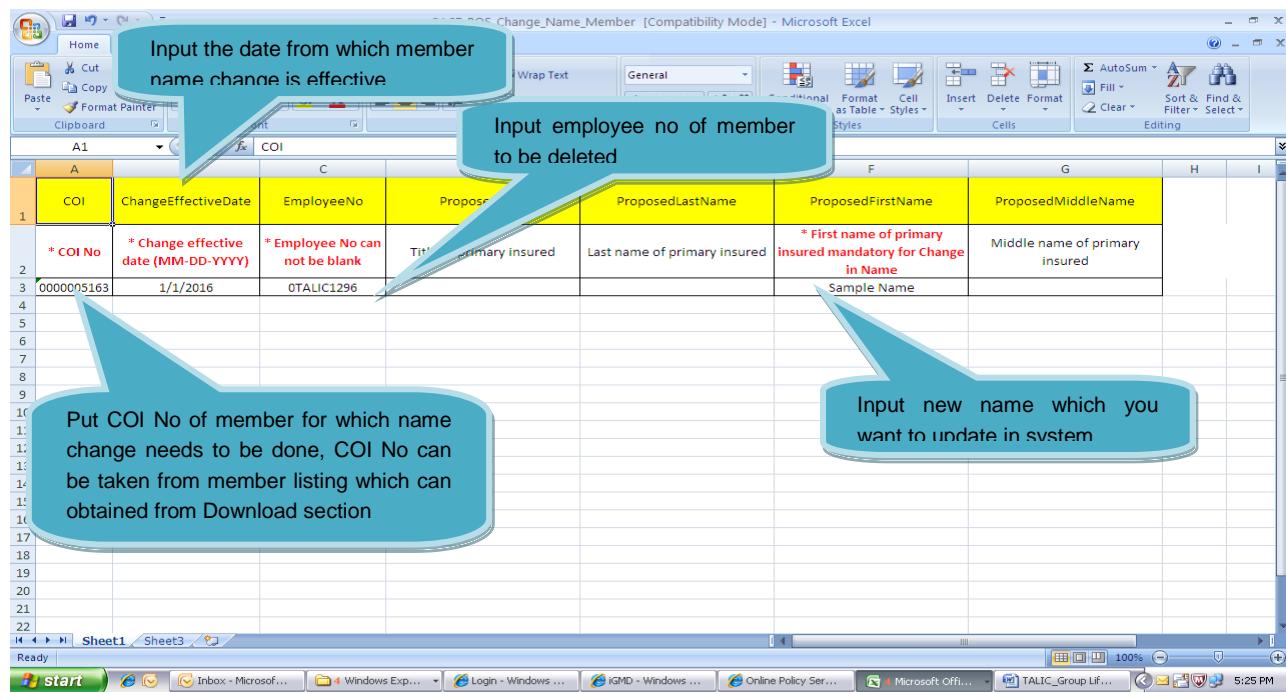


Figure 62: Online Servicing-Change in Name

#### **How to fill the details in upload file:-**

## Section-1



## **Step-2**

Browse upload file from your PC and click on “Upload” to begin the process. After the process starts it will take you to series of screen displaying various details and it will ask to action by you as shown in coming screens

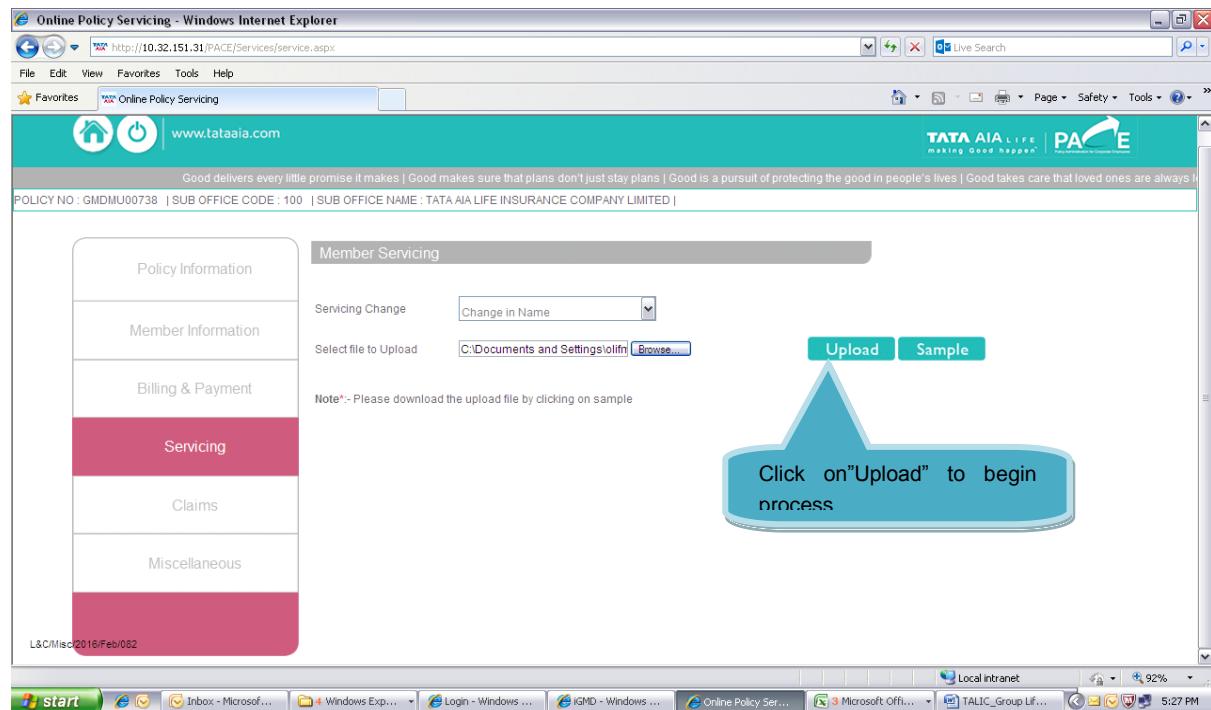


Figure 63: Online Servicing- Change in Name

## **Step-3**

After clicking “upload” below screen appears which display the log of details upload by you. After verifying the details click on “Next”.

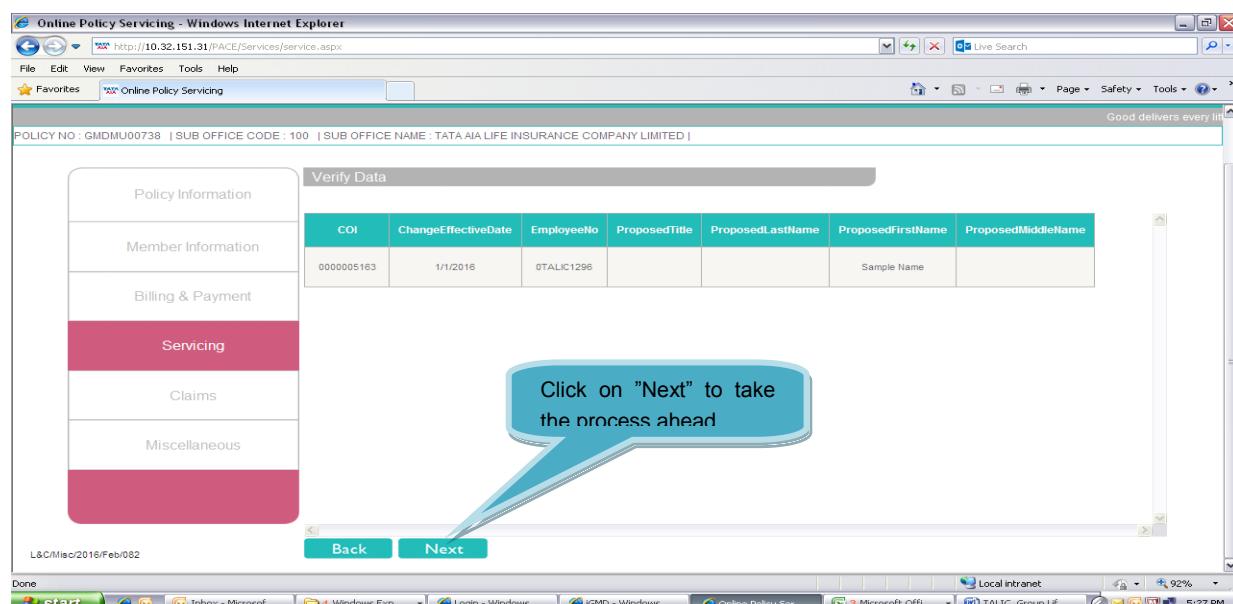


Figure 64: Online Servicing- Change in Name

## **Step-4**

After clicking “upload” below screen appears which display the log of details upload by you. There can be three possibilities in view log screen as described below basis the details you have uploaded.

1. **Success** :- When all the details match to specification and member details will reflect under this TAB
2. **Duplicate**:- When there are duplicate details in file like, employee code etc.
3. **Error**: - When a detail uploaded for members are not in specified format, system will display the error type for you to resolve, by clicking the “undo” option. Like date format is wrong “DD/MM/YY” instead of correct date format of “MM/DD/YY”.

After checking the details for the members click on ‘confirm’ to proceed ahead.

The screenshot shows a Windows Internet Explorer window titled 'Online Policy Servicing - Windows Internet Explorer'. The URL in the address bar is 'http://10.32.151.31/PACE/Services/service.aspx'. The page displays a 'View Log' section with three tabs: Success (selected), Duplicate, and Error. Below the tabs is a table with the following data:

COL	RequestDate	MemberType	ProposedTitle	ProposedLastName	ProposedFirstName	ProposedMiddleName	TransactionID
0000005163	27/02/2016	P			Sample Name		20160227172806

A vertical sidebar on the left contains links: Policy Information, Member Information, Billing & Payment, Servicing (which is highlighted in red), Claims, and Miscellaneous. At the bottom of the sidebar, it says 'L&C/Misc/2016/Feb/082'. At the bottom center are 'Undo' and 'Confirm' buttons. A blue callout bubble with the text 'Click on "Confirm" to proceed' points to the 'Confirm' button. The taskbar at the bottom shows various open applications including 'Start', 'Inbox - Microsoft...', 'Windows Explorer', 'Login - Windows...', 'iGMD - Windows...', 'Online Policy Ser...', 'Microsoft Offi...', 'TALIC\_Group Lif...', and the current browser window.

Figure 65: Online Servicing- Change in Name

## **Step-5**

After clicking “Confirm” below screen appears which display the job run for Name change of members. There is no premium charged for this servicing.

The screenshot shows a Windows Internet Explorer window titled "Online Policy Servicing - Windows Internet Explorer". The URL is <http://10.32.151.31/PACE/Services/service.aspx>. The page displays a table titled "Job" with the following data:

Policy Number	COI	NewNEL	NewAppliedCover	NewSumAssured	TerminationDate	ServiceReqNo	CreatedBy
GMDMU00738	0000004934	2700000.00	1400000.00	1400000.00	1/15/2016 12:00:00 AM	0000001518	59

The left sidebar menu includes "Policy Information", "Member Information" (selected), "Billing & Payment", "Servicing" (highlighted in red), "Claims", and "Miscellaneous". At the bottom are "Undo" and "Generate" buttons. The status bar at the bottom shows "L&C/Misc/2016/Feb/082". The taskbar at the bottom of the browser window shows various open applications including "Inbox - Microsoft...", "Windows Explor...", "Login - Windows ...", "IGMD - Windows I...", "Online Policy Ser...", "Microsoft Offi...", "TALIC\_Group Life...", and the browser itself.

Figure 66: Online Servicing- Change in Name (Job Run)

After the above name change confirmation can be checked in member information TAB, below is a screen shot for same.

The screenshot shows a Windows Internet Explorer window titled "Member Information - Windows Internet Explorer". The URL is <http://10.32.151.31/PACE/MemberInformation/MemberInformation.aspx>. The page displays a table titled "Member Enquiry" with the following data:

Name	Certificate No.	Search
	0000005163	

The left sidebar menu includes "Policy Information", "Member Information" (selected), "Billing & Payment", "Servicing", "Claims", and "Miscellaneous". The status bar at the bottom shows "L&C/Misc/2016/Feb/082". The taskbar at the bottom of the browser window shows various open applications including "UAT - Microso...", "Windows Explor...", "Internet E...", "Renewal Rec...", "MIS As on 01-01-2016", "PolicyWiseMe...", "PACE\_POS\_C...", "TALIC\_Group ...", and the browser itself.

Figure 67: Online Servicing- Change in Name (Job Run)

## 2.2.9 (F) Change in Designation

By using this option you can change the grades/designation of members in policy. Before we move ahead with how to process the change in grades/designation, we have to understand the grades and designation and there coverage, in the PACE we have assigned the designation code to respective sum assured. Same can be viewed under “Benefit basis” for download section.

Plan Master Code	View	Multiple Salary	Cover Type Code	Cover Type Name	Policy Year
P000000150			G	Graded Cover	Sep 2013 - Sep 2015
P000000150			G	Graded Cover	Sep 2014 - Sep 2016
P000000075			G	Graded Cover	Sep 2015 - Sep 2017

**Note:** The above table shows the benefit basis for the policy. Kindly refer to policy quote for more details.

Sr No.	Cover	Designation Code	Designation Name
1	7000000.00	001	001
2	4000000.00	002	002
3	2500000.00	003	003
4	1500000.00	004	004

Figure 74: Online Servicing-Change in Designation

Therefore once you got coverage details and its respective code as per above screen shot same can be used while adding the member and Change in sum assured. Same method is also used to identify and provide the coverage details while adding the members in the policy which has graded/ designation based coverage.

Below we will discuss the step wise process of change in designation of members.

## **Step-1**

Download the member listing and do reconciliation for members, post reconciliation once you have identified the members for whom designation change is required. Download the upload format by clicking on “Sample” and fill details in the columns as applicable (explained below). Kindly put date format as mentioned in file.

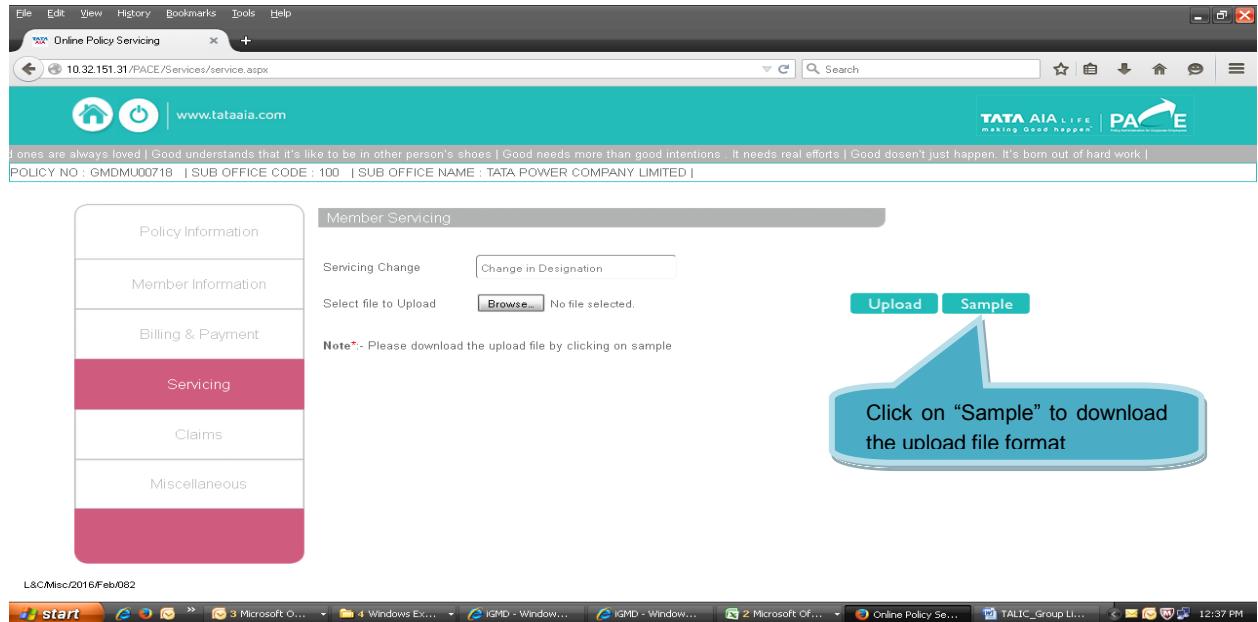


Figure 75: Online Servicing-Change in Designation

### **How to fill the details in upload file:-**

#### **Section-1**

The screenshot shows a Microsoft Excel spreadsheet titled 'TermMemberPOS\_Uplod-Group Life [Compatibility Mode] - Microsoft Excel'. The spreadsheet has several columns labeled: COI, SubofficeCode, ChangeEffectiveDate, PropRstNv, Lastname, Firstname, EmployeeNo, Birthdate, Gender, DesignationCode, AnnualIncome, FSA, FSG, and Terminationdt. Row 1 contains column headers, and row 2 contains sample data. A callout bubble points to the 'ChangeEffectiveDate' column with the text 'Input the date from which member name change is effective'. Another callout bubble points to the 'COI' column with the text 'Put COI No of member for which designation change needs to be done, COI No can be taken from member listing which can obtained from Download section'. A third callout bubble points to the 'DesignationCode' column with the text 'Input new designation code which you want to update in system'.

## **Step-2**

Browse upload file from your PC and click on “Upload” to begin the process. After the process starts it will take you to series of screen displaying various details and it will ask to action by you as shown in coming screens.

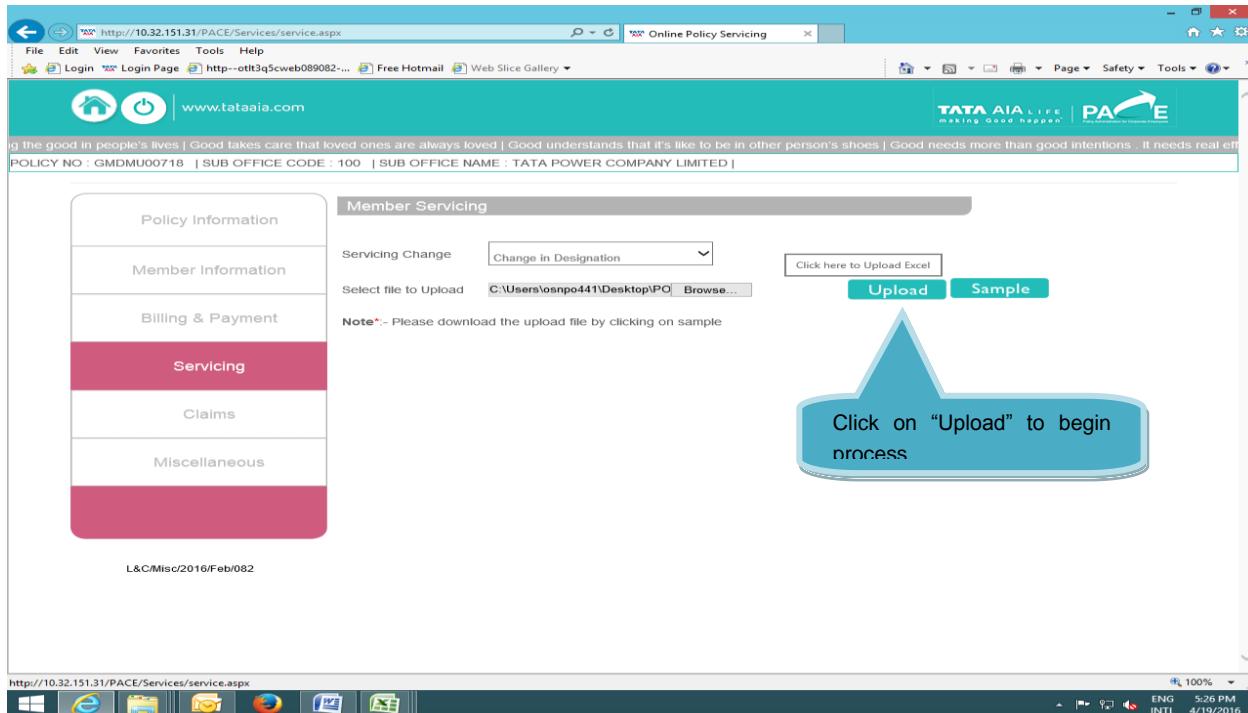


Figure 76: Online Servicing- Change in Designation

## **Step-3**

After clicking “upload” below screen appears which display the log of details upload by you. After verifying the details click on “Next”.

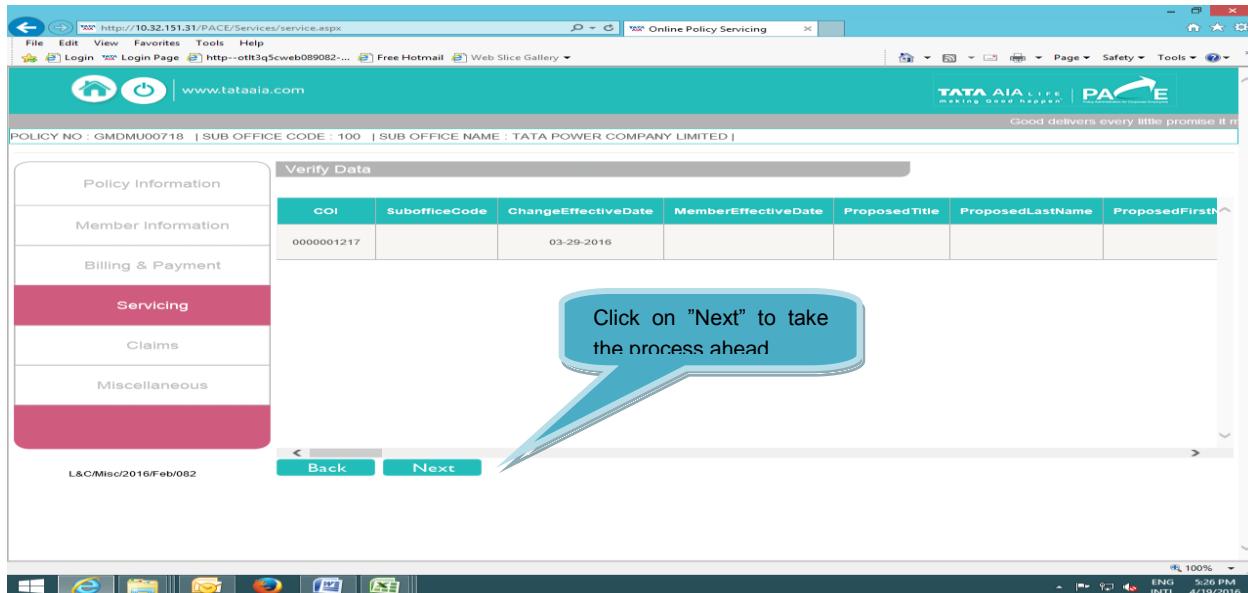


Figure 77: Online Servicing- Change in Designation

## **Step-4**

After clicking “upload” below screen appears which display the log of details upload by you. There can be three possibilities in view log screen as described below basis the details you have uploaded.

4. **Success** :- When all the details match to specification and member details will reflect under this TAB
5. **Duplicate**:- When there are duplicate details in file like, employee code etc.
6. **Error**:- When a detail uploaded for members are not in specified format, system will display the error type for you to resolve, by clicking the “undo” option. Like date format is wrong “DD/MM/YY” instead of correct date format of “MM/DD/YY”.

After checking the details for the members click on ‘confirm’ to proceed ahead.

The screenshot shows a web browser window for 'Online Policy Servicing' at the URL <http://10.32.151.31/PACE/Services/service.aspx>. The page title is 'Online Policy Servicing'. The main content area is titled 'View Log' and displays a table of uploaded member details. The table has columns: COI, RequestDate, MemberType, DesignationCode, AnnualIncome, FSA, FSG, and TransactionID. One row is shown with values: 0000001217, 19/04/2016, P, 007, and 20160419172734. To the left of the table is a sidebar with links: Policy Information, Member Information, Billing & Payment, Servicing (which is highlighted in red), Claims, and Miscellaneous. At the bottom of the sidebar, it says 'L&C/Misc/2016/Feb/082'. Below the table are two buttons: 'Undo' and 'Confirm'. A blue callout bubble with the text 'Click on "Confirm" to proceed' points to the 'Confirm' button. The status bar at the bottom shows system icons and the date/time '4/19/2016 5:27 PM'.

Figure 78: Online Servicing- Change in Designation

## **Step-5**

After clicking “Confirm” below screen appears which display the job run for Designation change of members.

The screenshot shows a web browser window titled "Online Policy Servicing" with the URL <http://10.32.151.31/PACE/Services/service.aspx>. The page header includes the TATA AIA LIFE logo and the PACE logo. The main content area displays a table titled "Job" with the following data:

Policy Number	COI	NewNEL	NewAppliedCover	NewSumAssured	TerminationDate	ServiceReqNo	CreatedBy
GMDMU00718	0000001217	25000000.00	1500000.00	1500000.00	3/29/2016 12:00:00 AM	0000001523	51

The left sidebar has a navigation menu with the following items: Policy Information, Member Information, Billing & Payment, **Servicing** (which is highlighted in red), Claims, and Miscellaneous. At the bottom of the sidebar are "Undo" and "Generate" buttons. The status bar at the bottom right shows the date and time: ENG 5:28 PM INTL 4/19/2016.

Figure 79: Online Servicing- Change in Designation (Job Run)

After scrutiny the details for the members click on ‘Generate’ to proceed ahead for generating the bill for the designation of members. After clicking it take you to next as shown in next step.

## Step-6

After clicking “Generate” below screen appears which display the premium calculation for each member uploaded by you. It gives details insight of premium calculation like No. of days, period for which premium is charged, gross premium, service tax etc.

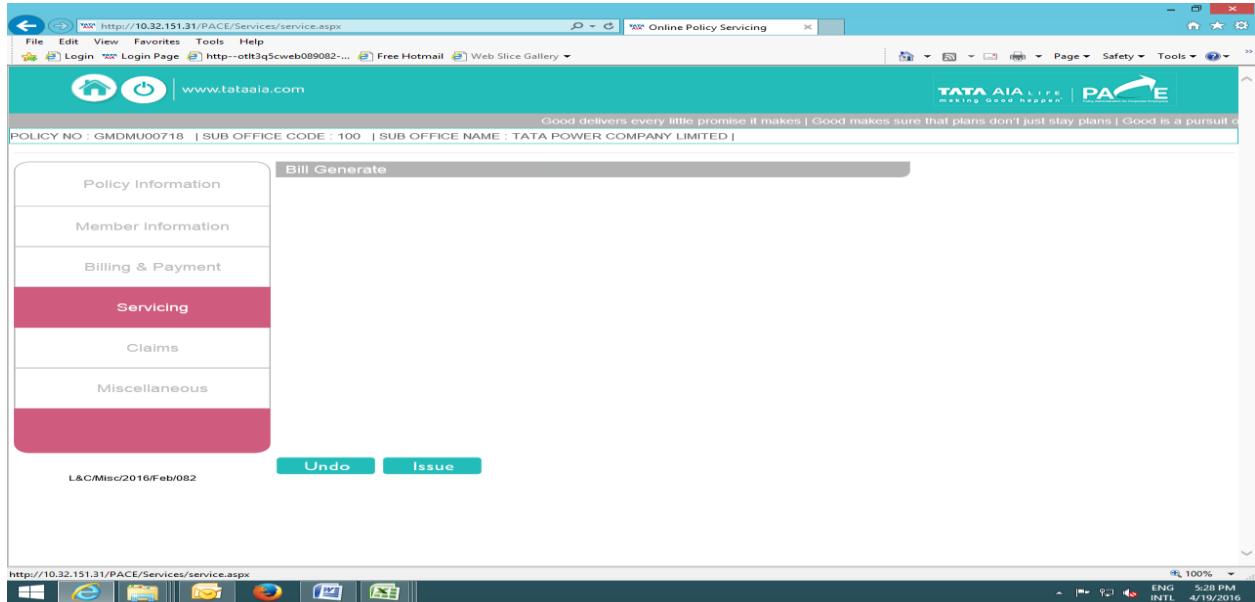


Figure 80: Online Servicing- Change in Designation

After verifying the premium details for the members click on ‘Issue’ to proceed for issuing the bill for the current designation change of members. After clicking it take you to next screen as shown below.

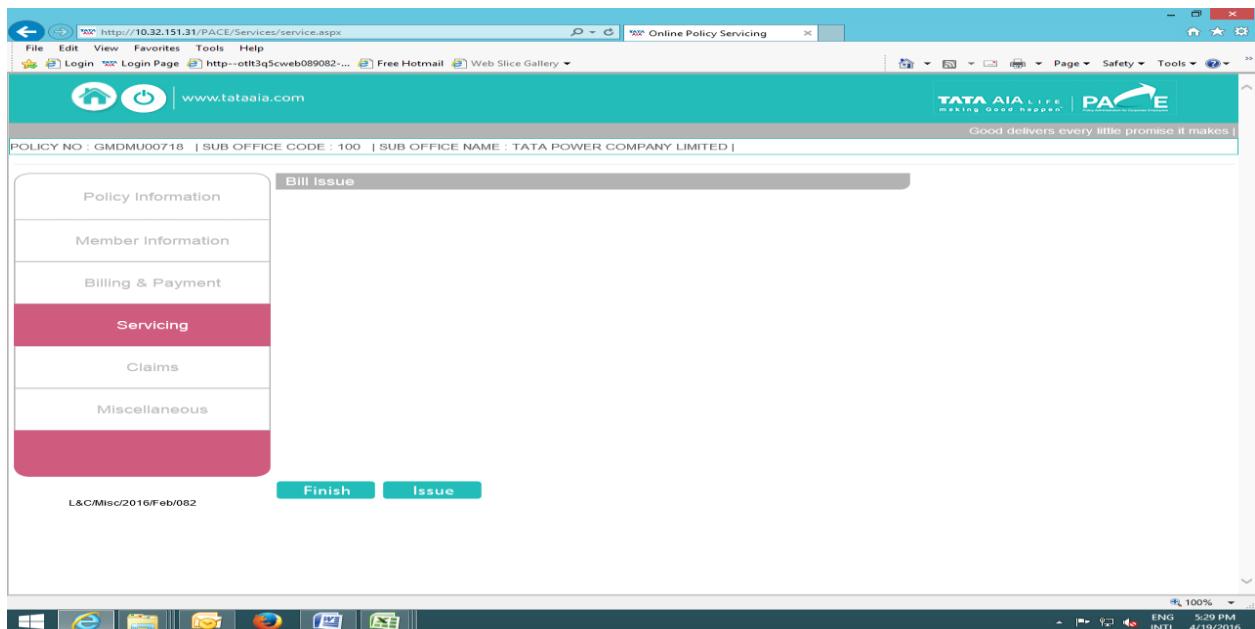


Figure 81: Online Servicing- Change in Designation

Finally the bill is issued and you can click on “Finish” to complete the process. Then proceed to bill payment TAB and make the payment for bill generated as per bill payment process explained previously.

## 2.3 Terminated and Lapsed Policy

The PACE portal is not accessible for “Terminated” and “Lapsed” policies. Users will get the below pop up when trying to login into the terminated and lapsed policies.



Figure 82: PACE Login Page

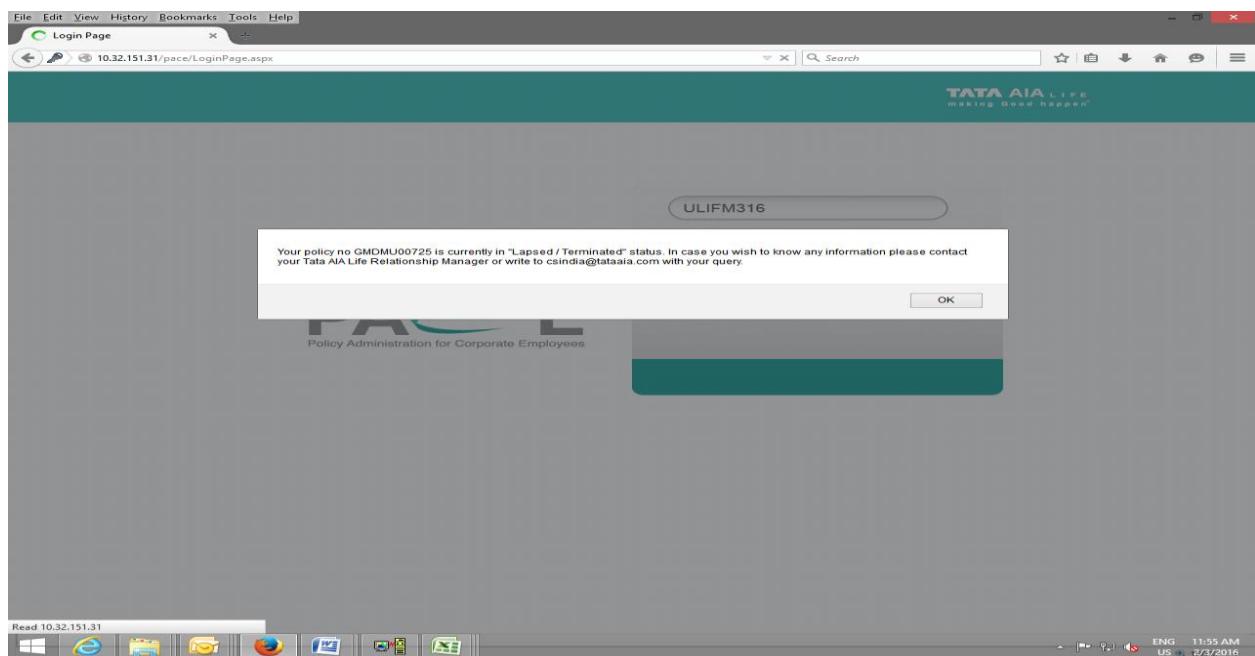


Figure 83: Terminated/Lapsed Policy Pop Up

## 2.4 Claims Process

In below section we will explain the claim processing the various sub sections are mentioned below.

This section has the following options:

- 1) Intimation of a death claim
- 2) Tracking status of the pending claims/ payout details of decided claims
- 3) Download of claim forms & requirements basis the product
- 4) FAQ's

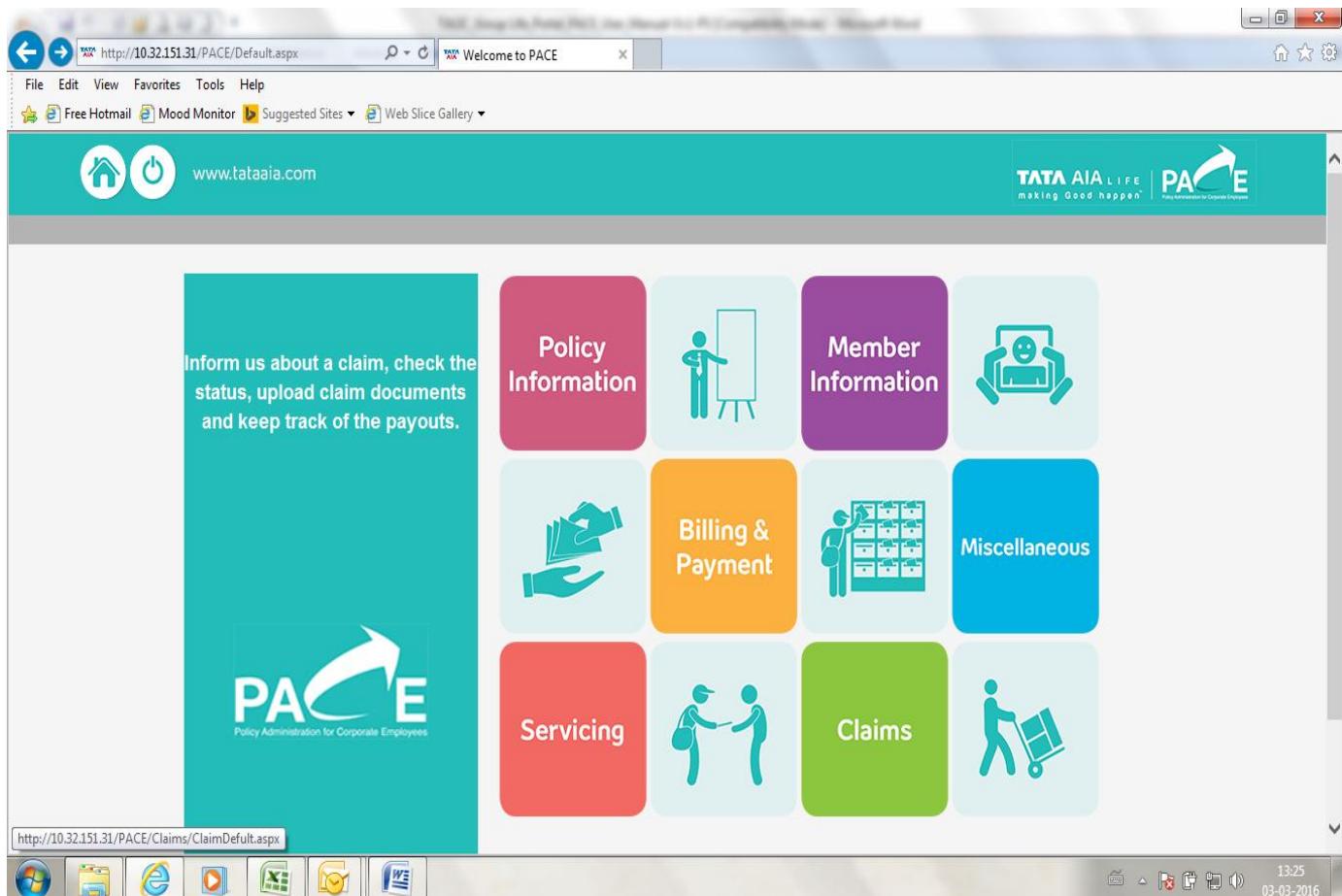


Figure 84: PACE Home Page

## 2.4.1 (A) Death Claim Intimation

### Step-1:- Click on Intimation

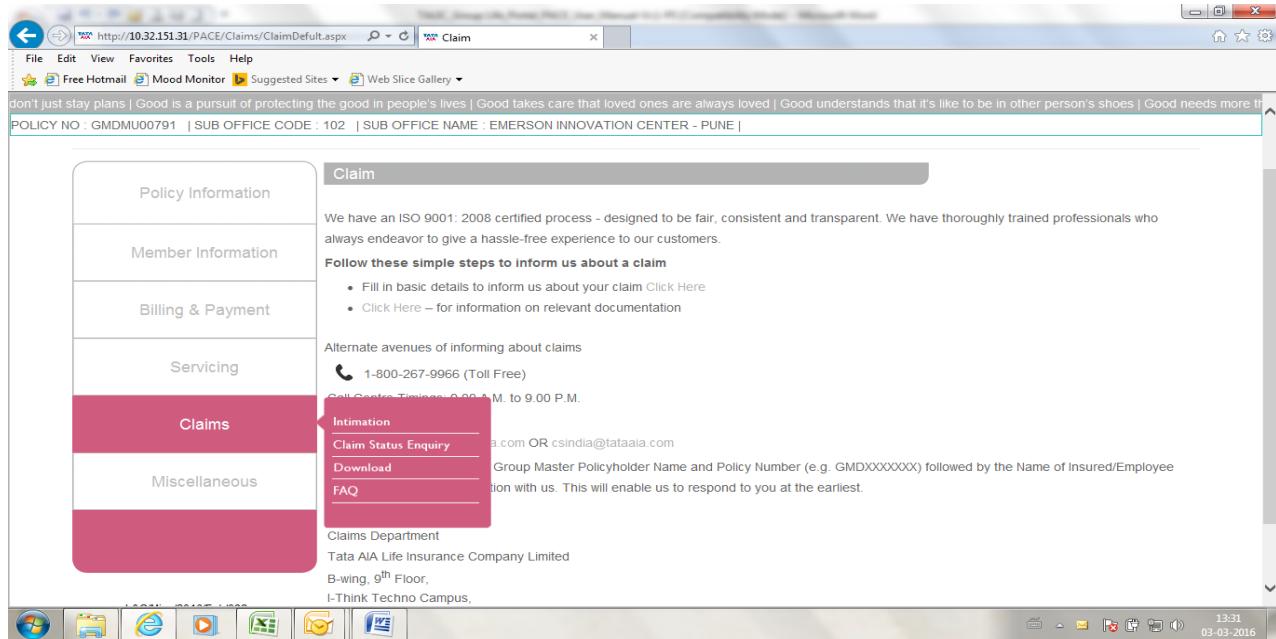


Figure 85: Claim -Intimation

Click on the search icon in Name of Insured Member & the list of active members will pop up. This data will have the Certificate of Insurance No, Name of the Insured employee, DOB & employee Code.

Figure 86: Claim -Intimation

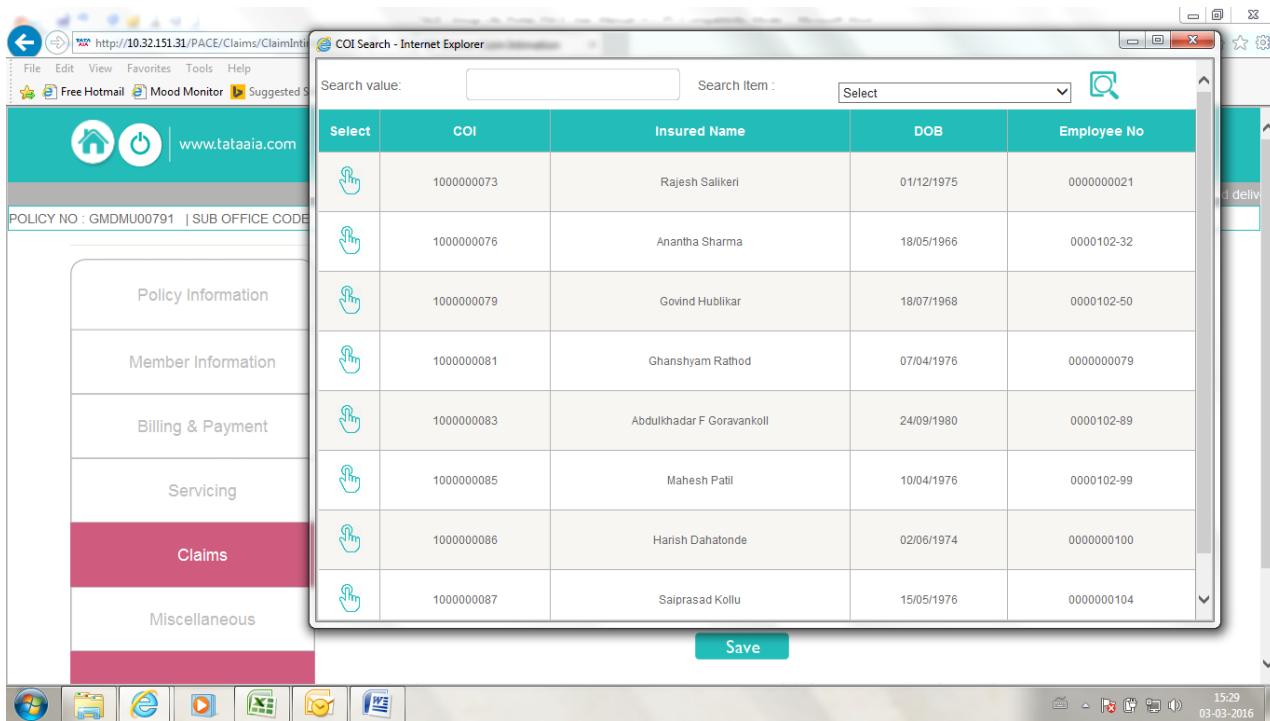


Figure 87: Claim -Intimation

Input the name of the deceased employee in the search value & select “Name” from drop down in Search item – click on search icon

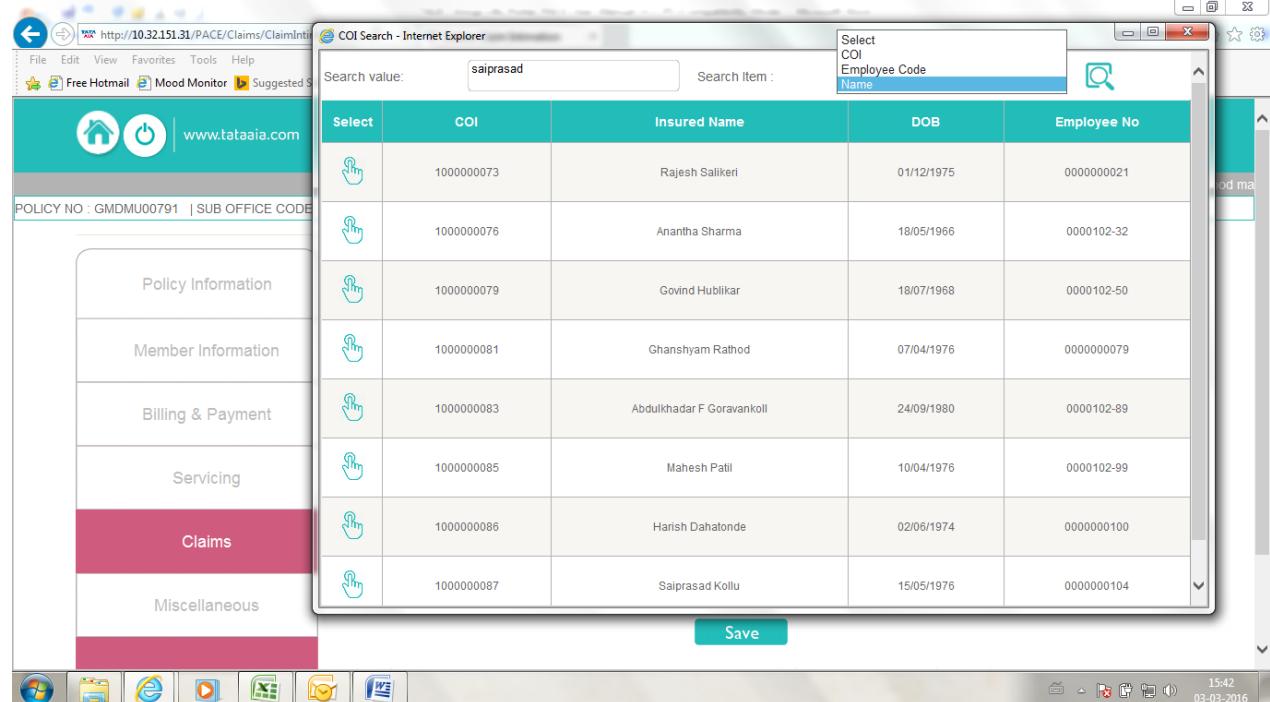


Figure 88: Claim -Intimation

### Details of employee will reflect on screen

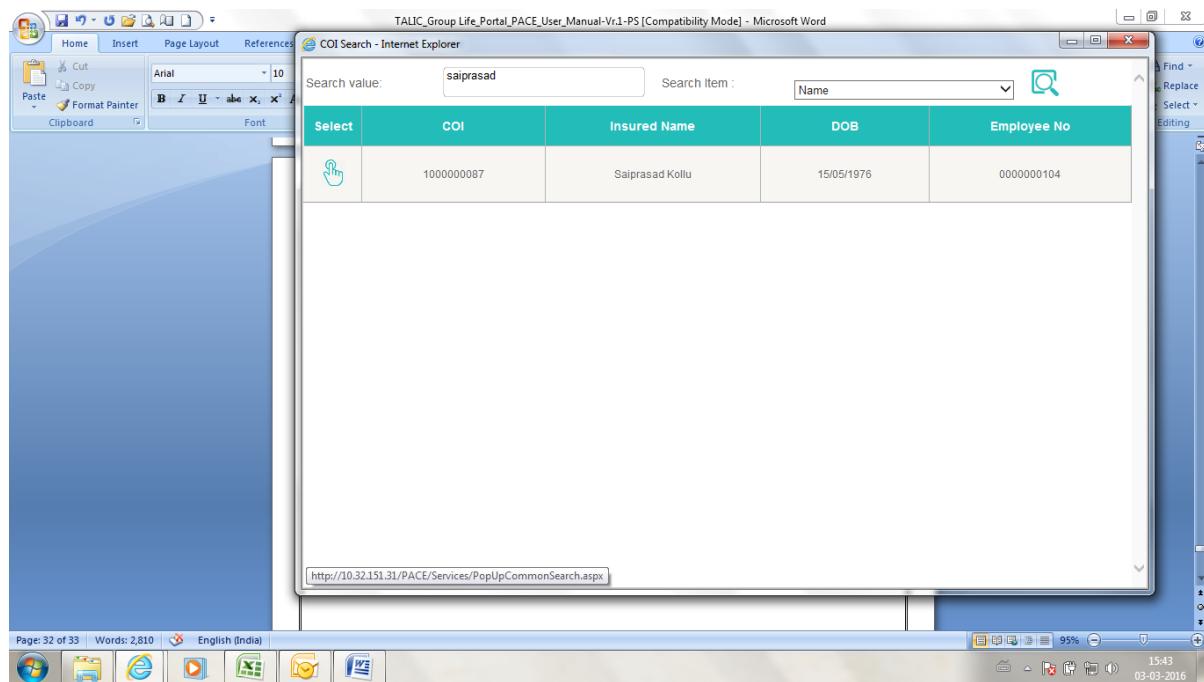


Figure 89: Claim -Intimation

Check the employee number & DOB to confirm the details of the deceased employee & click on select icon on the extreme left of the screen

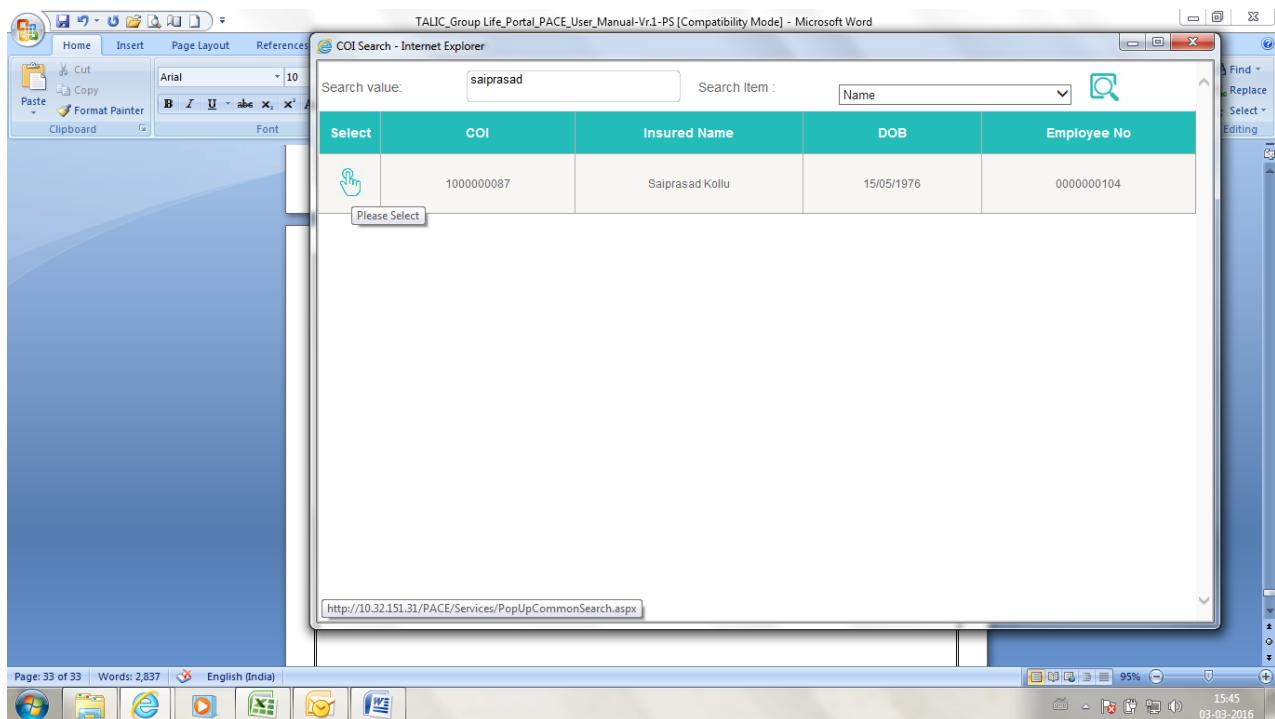


Figure 90: Claim -Intimation

Check the employee number & DOB to confirm the details of the deceased employee & click on select icon on the extreme left of the screen. The selected employee details will reflect on the Claim Intimation screen.

The screenshot shows the PACE Online Claim Intimation interface. On the left, there is a vertical navigation menu with sections: Policy Information, Member Information, Billing & Payment, Servicing, Claims (which is highlighted in red), and Miscellaneous. The main form area is titled 'Claim Intimation'. It contains fields for Category (set to 'Add Claim Request'), Certificate of Insurance (COI) number (1000000087), Name of Insured member (Saiprasad Kolu), Date of Death (March 3, 2016), Cause of Death (empty), and an option to Upload claim documents (.pdf only upto 2MB). A 'Save' button is at the bottom right. The top of the page shows the URL http://10.32.151.31/PACE/claims/claimintimation.aspx and the TATA AIA LIFE logo.

Figure 91: Claim –Intimation

Please select date of death from calendar

This screenshot is similar to Figure 91, showing the 'Claims' section selected in the navigation menu. The 'Date of Death' field is populated with 'March 3, 2016'. A calendar modal window is open over the form, showing the month of March 2016. The calendar grid includes columns for Su, Mo, Tu, We, Th, Fr, Sa and rows for dates from 28 to 31. The date 'March 3, 2016' is highlighted in blue. The rest of the interface and status bar are visible.

Figure 92: Claim –Intimation

### Please input cause of death

Policy Information

Member Information

Billing & Payment

Servicing

**Claims**

Miscellaneous

Claim Intimation

Category \* Add Claim Request

Certificate of Insurance (COI) 1000000087

Name of Insured member \* Saiprasad Kollu

Date of Death 03/01/2016

Cause of Death Heart Attack

Upload claim documents (.pdf only upto 2MB)

**Save**

Figure 93: Claim –Intimation

In case the claim documents are available, then click on browse & select the file to be uploaded. (Only PDF files up to 2MB can be uploaded). Click on Save

Policy Information

Member Information

Billing & Payment

Servicing

**Claims**

Miscellaneous

Claim Intimation

Category \* Add Claim Request

Certificate of Insurance (COI) 1000000087

Name of Insured member \* Saiprasad Kollu

Date of Death 03/01/2016

Cause of Death Heart Attack

Upload claim documents (.pdf only upto 2MB)

**Save**

\* Note: Notifications of claim, submission of claim forms and/or claim documents to the Company shall not be construed as an admission of liabilities of the Company.

L&C/Misc/2016/Feb/082

<http://10.32.151.31/PACE/claims/claimintimation.aspx?COI=1000000087&DDLFirst=&InsuredName=+Saiprasad+Kollu>

Figure 94: Claim –Intimation

System will display the Service request no. Click ok to exit to main Claim Intimation screen. A system generated email will be sent on the registered e-mail ID's of the Master Policyholder acknowledging the Claim Intimation logged online.

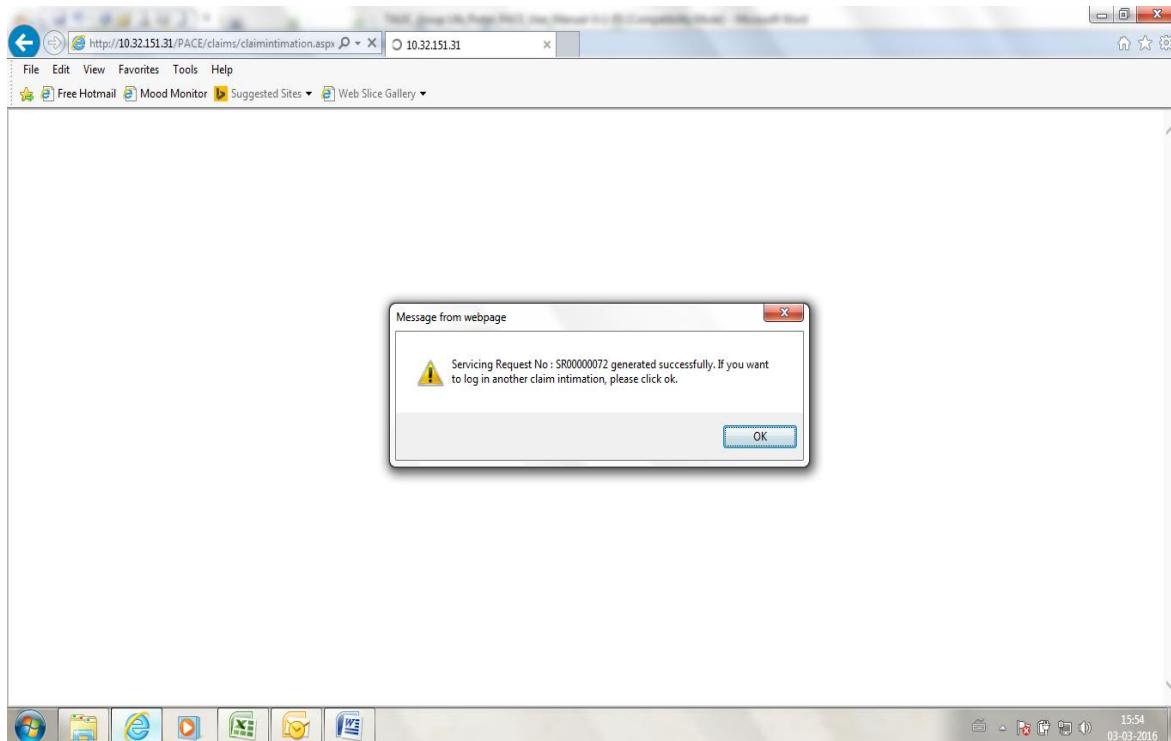


Figure 95: Claim –Intimation

## 2.4.2 (B) Upload claim documents post intimation

Select Claim Status Enquiry from Main page

Figure 96: Claim –Document Upload-1

	SR No.	SR Date	Policy Number	COI	Insured Name	Employee No.	Date of Death
<input type="button" value="Browse..."/>	SR00000072	03/03/2016	GMDMU00791	1000000087	Saiprasad Kolu	0000000104	01/03/2016
<input type="button" value="Browse..."/>	SR00000071	02/03/2016	GMDMU00791	1000000087	Saiprasad Kolu	0000000104	08/02/2016
<input type="button" value="Browse..."/>	SR00000070	01/03/2016	GMDMU00791	1000000071	Sukhadia Bhide	0000000015	02/02/2016

Figure 97: Claim –Document Upload-2

### Input Service request No/ Name of Employee & click Search

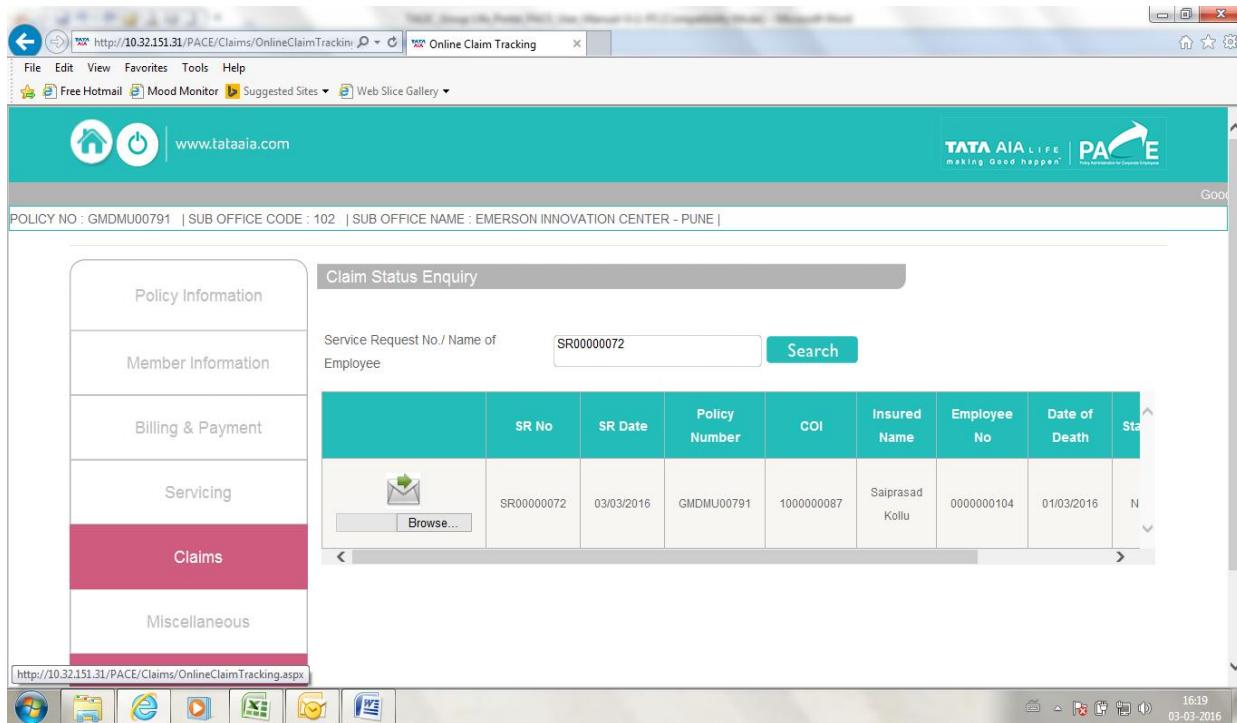


Figure 98: Claim –Document Upload-3

Click on browse & select the file to be uploaded. (Only PDF files up to 2MB can be uploaded). Click on email icon. A system generated email with the uploaded claim documents will be sent to the claims department. A system generated email will be sent on the registered e-mail ID's of the Master Policyholder acknowledging the Claim documents uploaded.

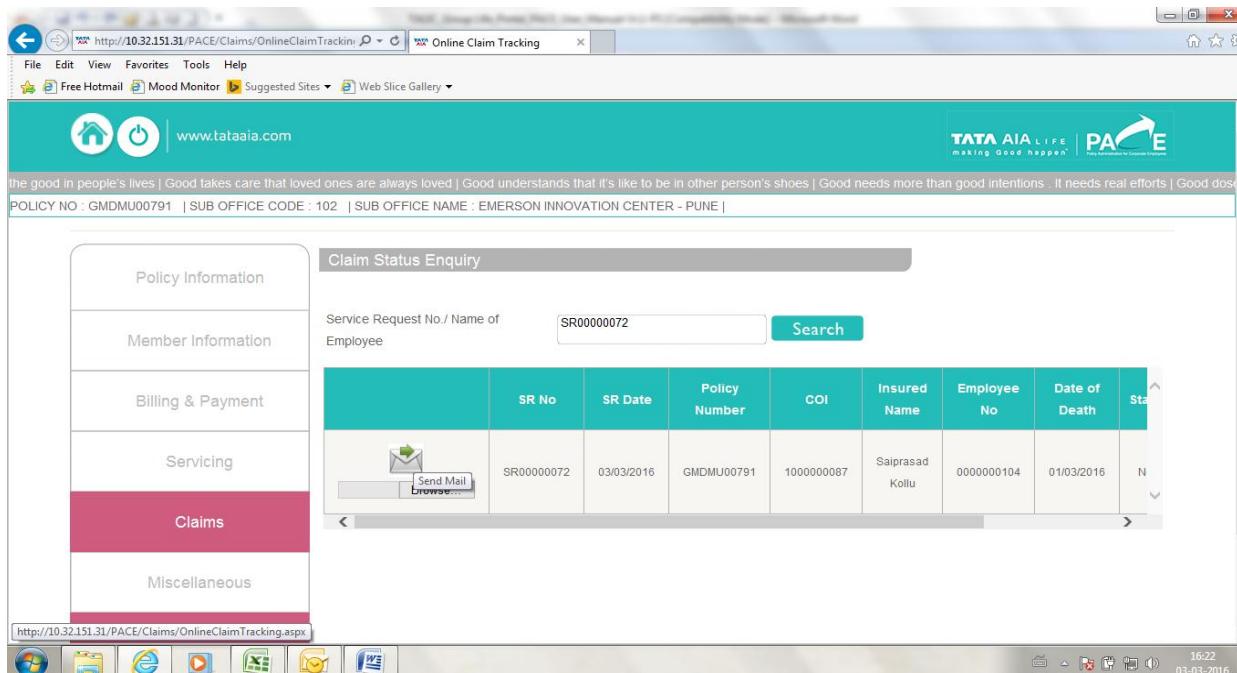


Figure 99: Claim –Document Upload-3

## 2.4.3 (C) Check the claim status post Intimation

Select Claim Status Enquiry from Main page

The screenshot shows the PACE Online Claim Intimation page. On the left, there is a vertical navigation menu with options: Policy Information, Member Information, Billing & Payment, Servicing, Claims (which is highlighted in pink), and Miscellaneous. The main content area is titled 'Claim Intimation'. It contains fields for 'Category' (with a dropdown menu showing 'Add Claim Request'), 'Certificate of Insurance (COI)', 'Name of Insured member' (with a search icon), 'Date of Death' (with a browse icon), and a 'Save' button. A sidebar on the right lists 'Intimation', 'Claim Status Enquiry' (which is underlined in blue), 'Download', and 'FAQ'.

Figure 100: Claim –Status Enquiry

The screenshot shows the PACE Online Claim Tracking page. The left navigation menu is identical to Figure 100. The main content area is titled 'Claim Status Enquiry'. It features a search bar for 'Service Request No./Name of Employee' and a 'Search' button. Below the search bar is a table with columns: SR No., SR Date, Policy Number, COI, Insured Name, Employee No., and Date of Death. Three rows of data are displayed:

	SR No.	SR Date	Policy Number	COI	Insured Name	Employee No.	Date of Death
<input type="button" value="Browse..."/>	SR00000072	03/03/2016	GMDMU00791	1000000087	Saiprasad Kolu	0000000104	01/03/2016
<input type="button" value="Browse..."/>	SR00000071	02/03/2016	GMDMU00791	1000000087	Saiprasad Kolu	0000000104	08/02/2016
<input type="button" value="Browse..."/>	SR00000070	01/03/2016	GMDMU00791	1000000071	Sukhada Bhide	0000000015	02/02/2016

Figure 101: Claim –Status Enquiry

### Input Service request No/ Name of Employee & click Search

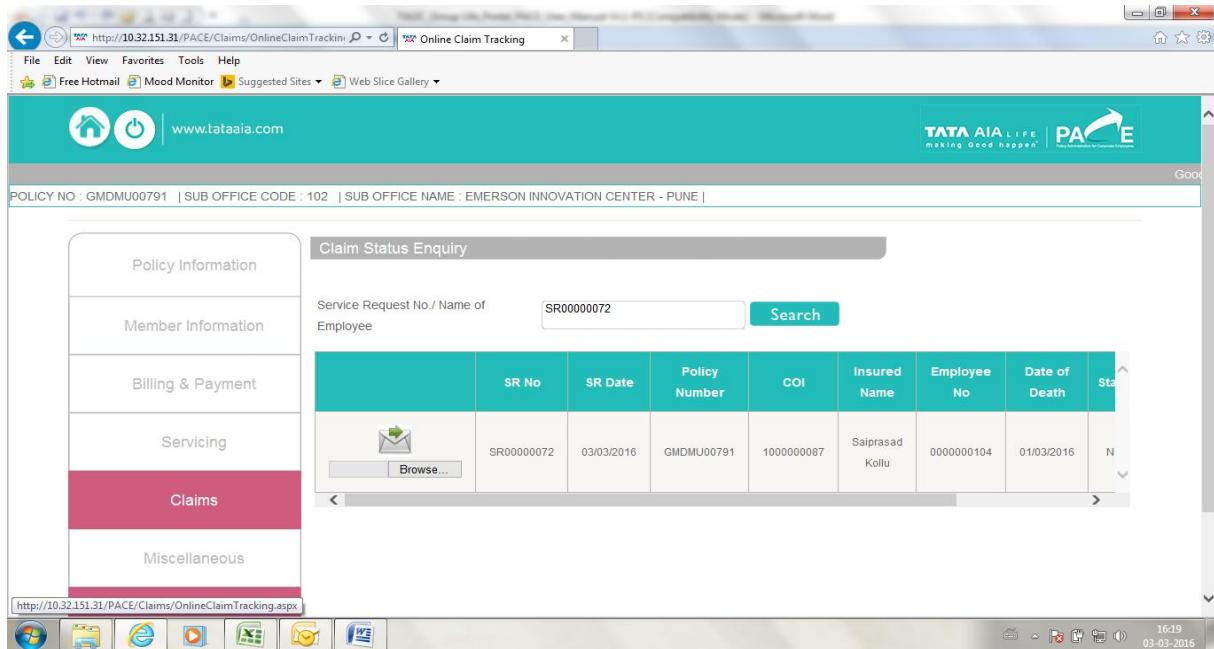


Figure 102: Claim –Status Enquiry

Use the scroll bar to go the right of the screen to check the status of the claim along with the list of pending requirements (if any). Please note that the claim status will be updated within 3 working days post logging in the claim intimation. In case the claim is settled, then UTR No & date of NEFT will also be available alongside the claim on this same screen.

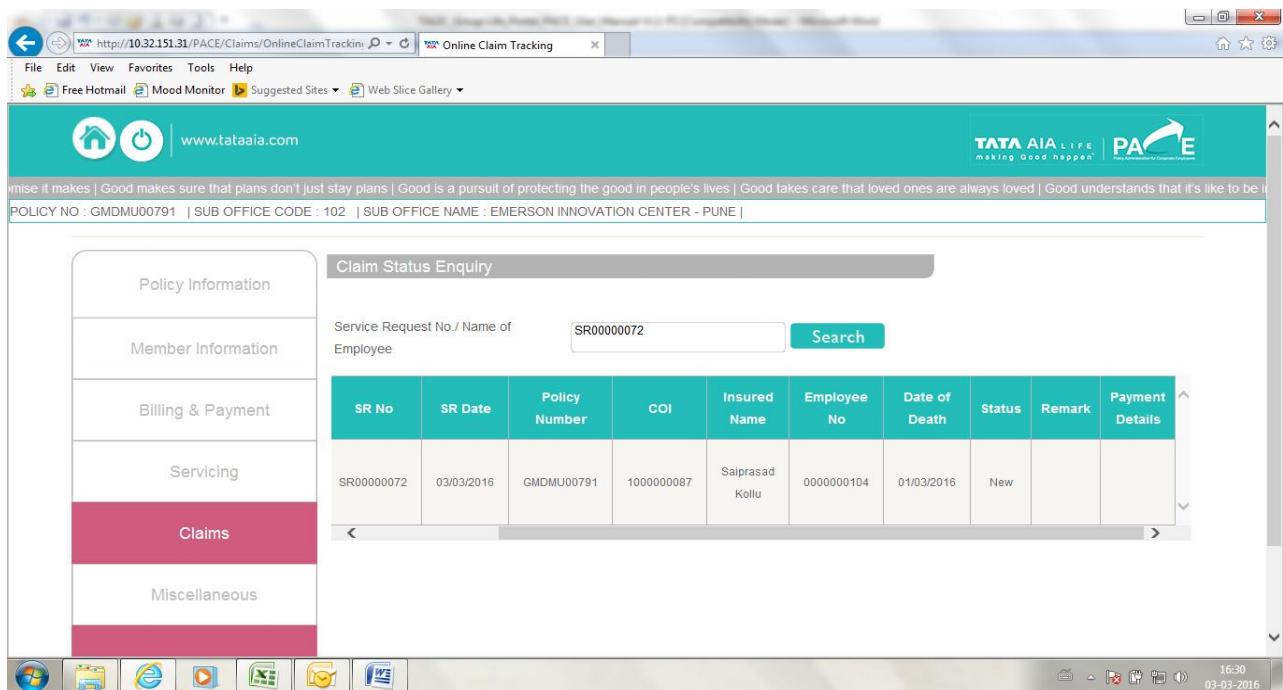


Figure 103: Claim –Status Enquiry

## 2.4.4 (D) Download claim forms or general list of documents

Select Claims – Download from Main page.

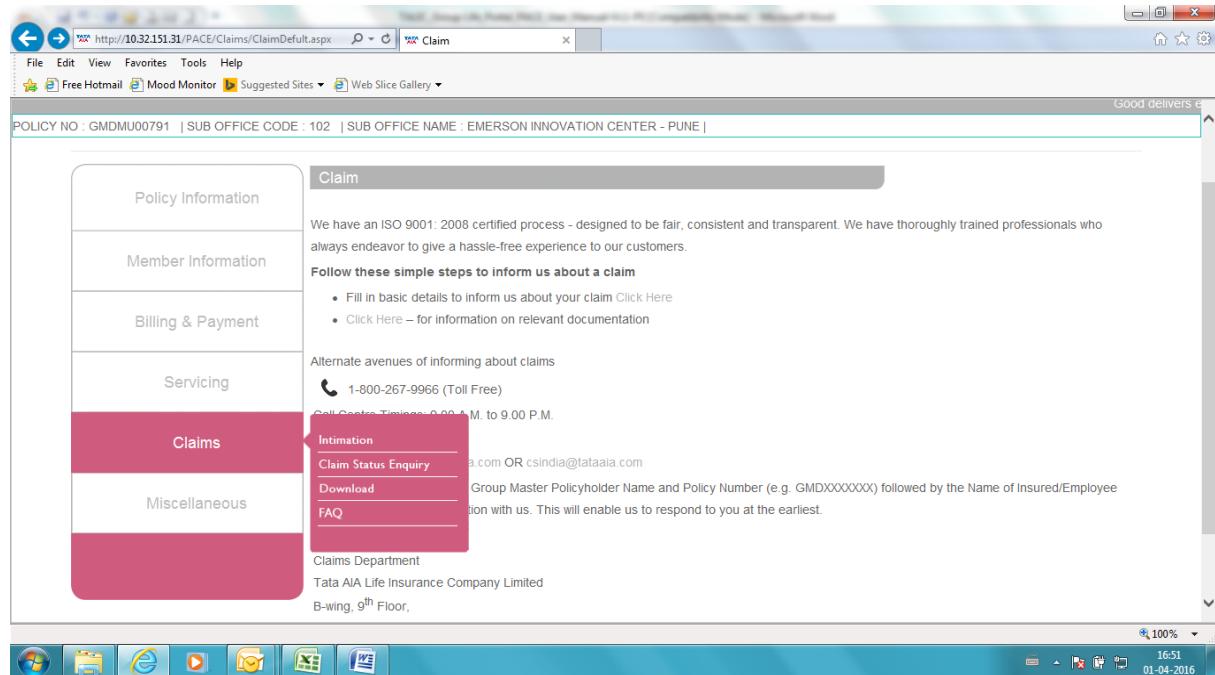


Figure 104: Claim –Document Download

The claim forms & list of requirements for different policies can be downloaded. The documents mentioned here are the basic requirements & the employer will have to contact the claims department for any deviations in case any document is not available with the family.

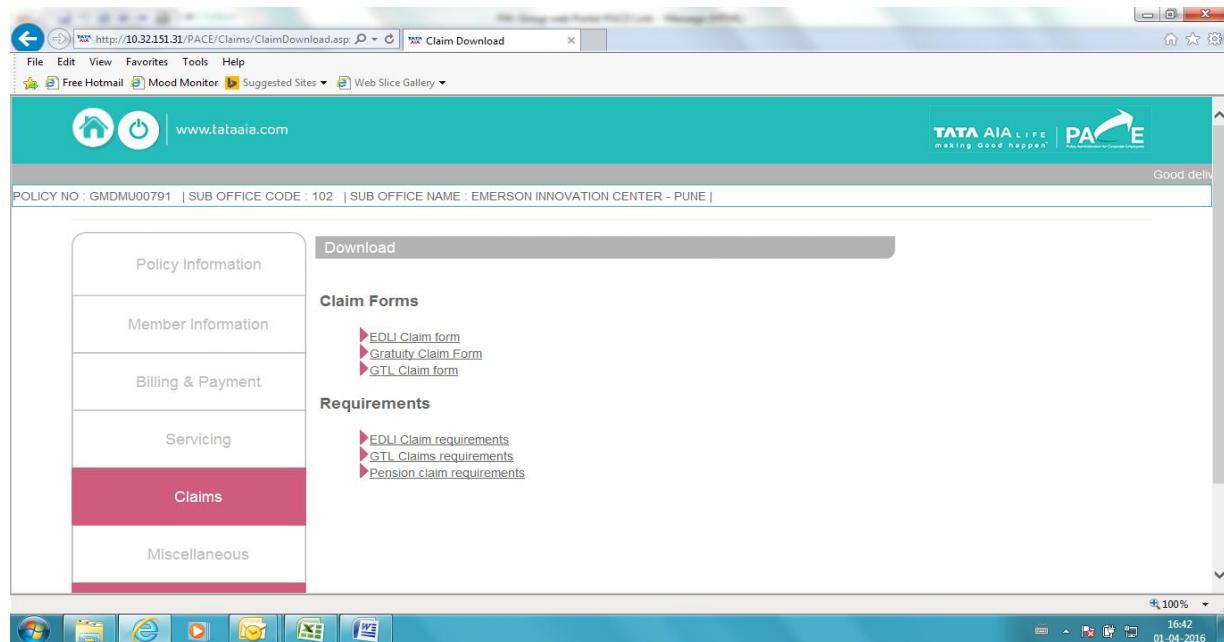


Figure 105: Claim –Document Download

## 2.4.5 (E) Claim FAQ's

Select Claims – FAQ's from Main page.

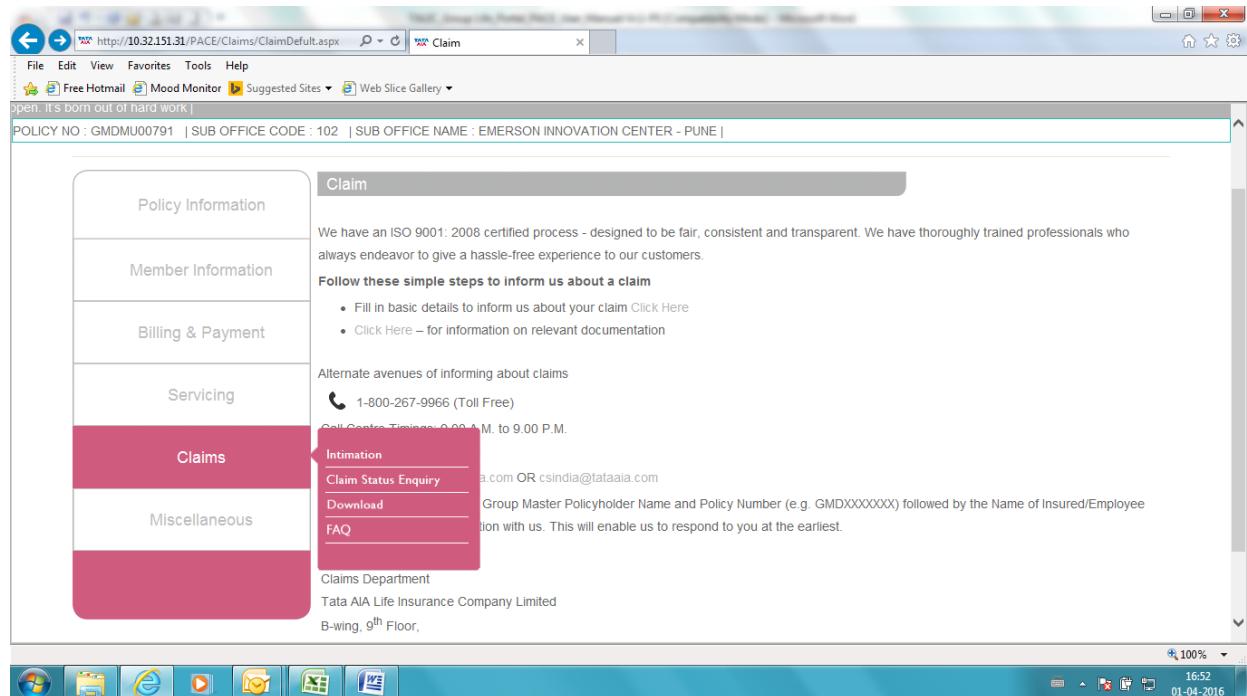


Figure 106: Claim –FAQ



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