

2.3. Projects requirements:

The First Party had approached the Second Party and showed its interest in buying the customized Web Application from the Second Party with the features and detailed description as mentioned below in this MOU and that will be counted as an SoW for mutual agreement to work upon.

USER ROLES:

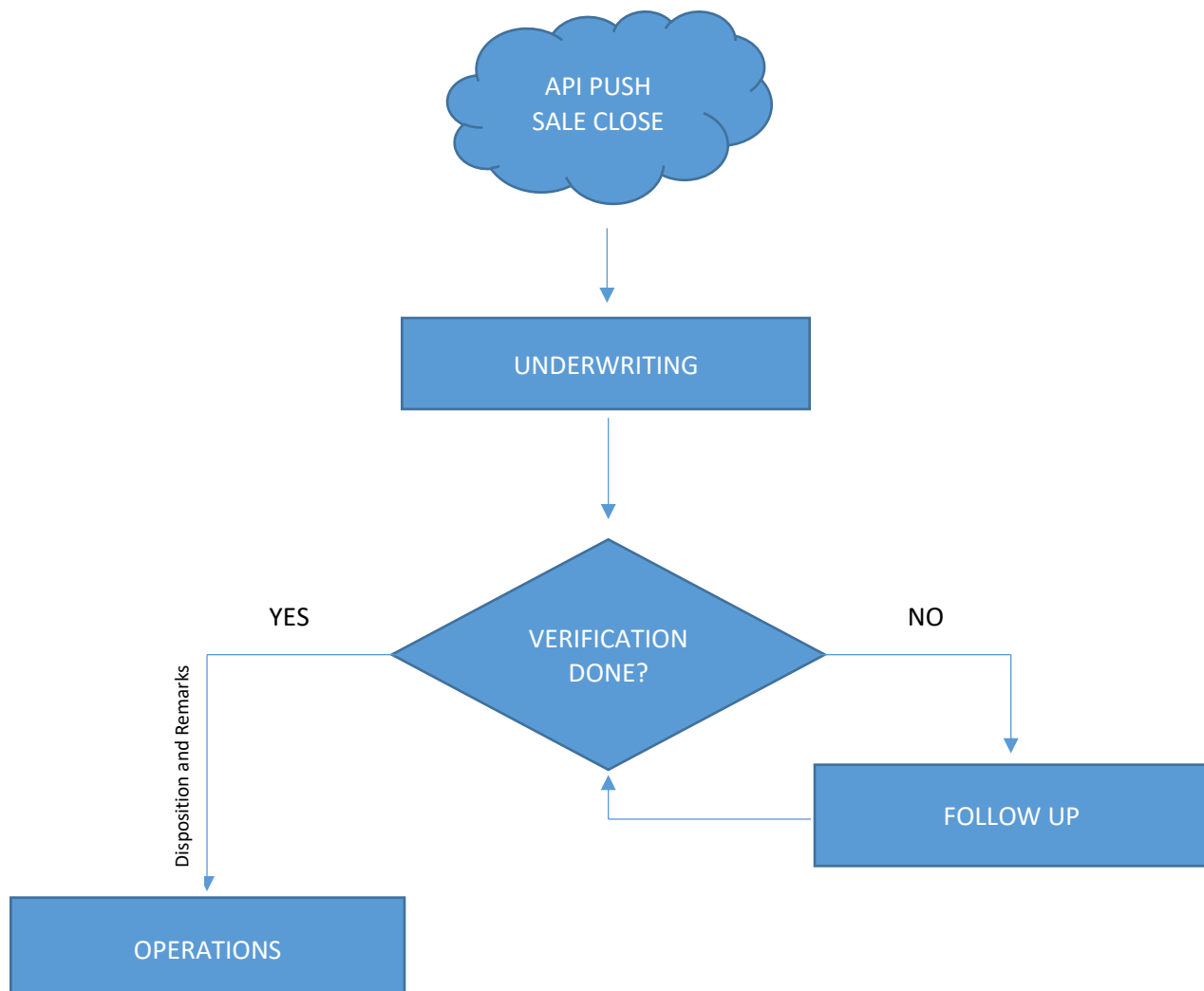
- MASTER ADMIN
- UNDERWRITER/VERIFIER
- OPERATIONS
- SERVICES
- CLAIMS
- RENEWALS
- GRIEVANCES / CUSTOMER SERVICES

TECHNOLOGIES:

- PHP 7.1 or above
- JQuery 3.5
- Javascript
- AJAX
- MYSQL
- HTML5
- CSS3

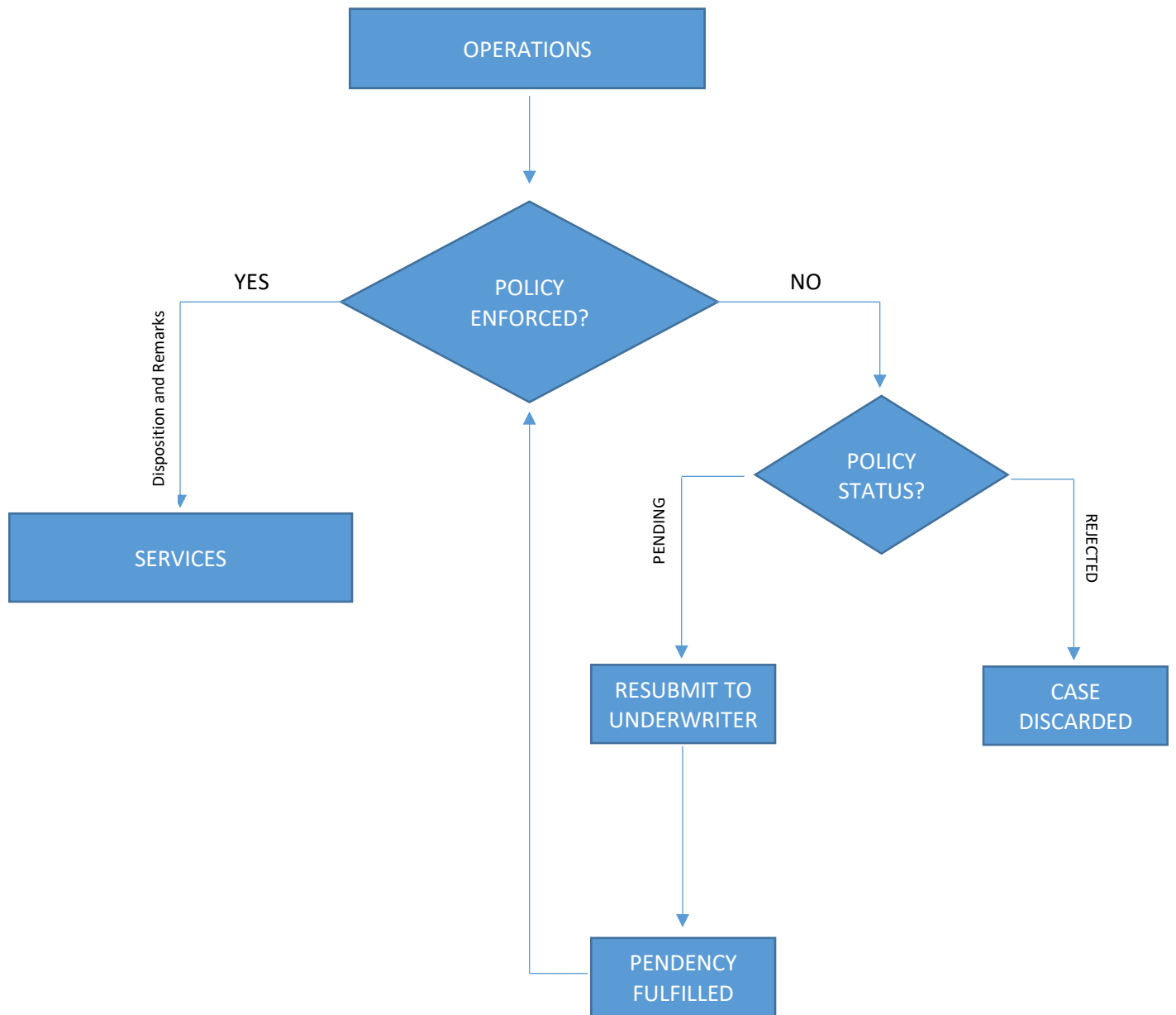
UNDERWRITER/VERIFIER:

- Login to Dashboard.
- After the Data PUSH being received on the CRM, the Underwriter/Verifier shall verify all the details from the client filled at the time of sale-close. The verification process contains the **editing of previously added values or addition of new values under blank fields.**
- Can **also add remarks** when marking verification as done.
- Can add reminders for the call-back.
- Can add images/documents.
- Select dispositions and submit.



OPERATIONS:

- Login to Dashboard.
- Once the Underwriter submits the verification, The case will be transferred to OPERATIONS.
- Operations continues with the company to issuance process of the policy.
- Operations can Add requirements being flagged by the company.
- Operations can resubmit the case to verifier in case of any shortcoming.
- Operations can upload the documents or images as himself as required by the company.
- Can also add remarks.
- Can add reminders for the call-back.
- Select Disposition (Policy Enforced/Rejected) and submit.



SERVICES:

- Login to Dashboard.
- Services comes into the action after the Policy Enforced.
- Services communicates with the client regarding the plan, facilities and features being provided under the policy.
- Also, confirm about the details being filled at the time of sales and verification.
- In case of any edition required, Policy status changes to *Change in policy*.
- Services can add remarks with disposition.
- While the status changes to *Change in Policy*, The case resubmits to the operations.
- Once Operations confirms the resubmission, Services has to reiterate the process.

SERVICES



YES

NO

FOLLOW UP



YES

NO

PENDING

DONE

Disposition and Remarks

- FOR MEMBER ADDITION
- FOR PED ADDITION
- FOR ENDORSEMENT
- FOR HEALTH CHECKUP
- NOT CONTACT

Disposition and Remarks

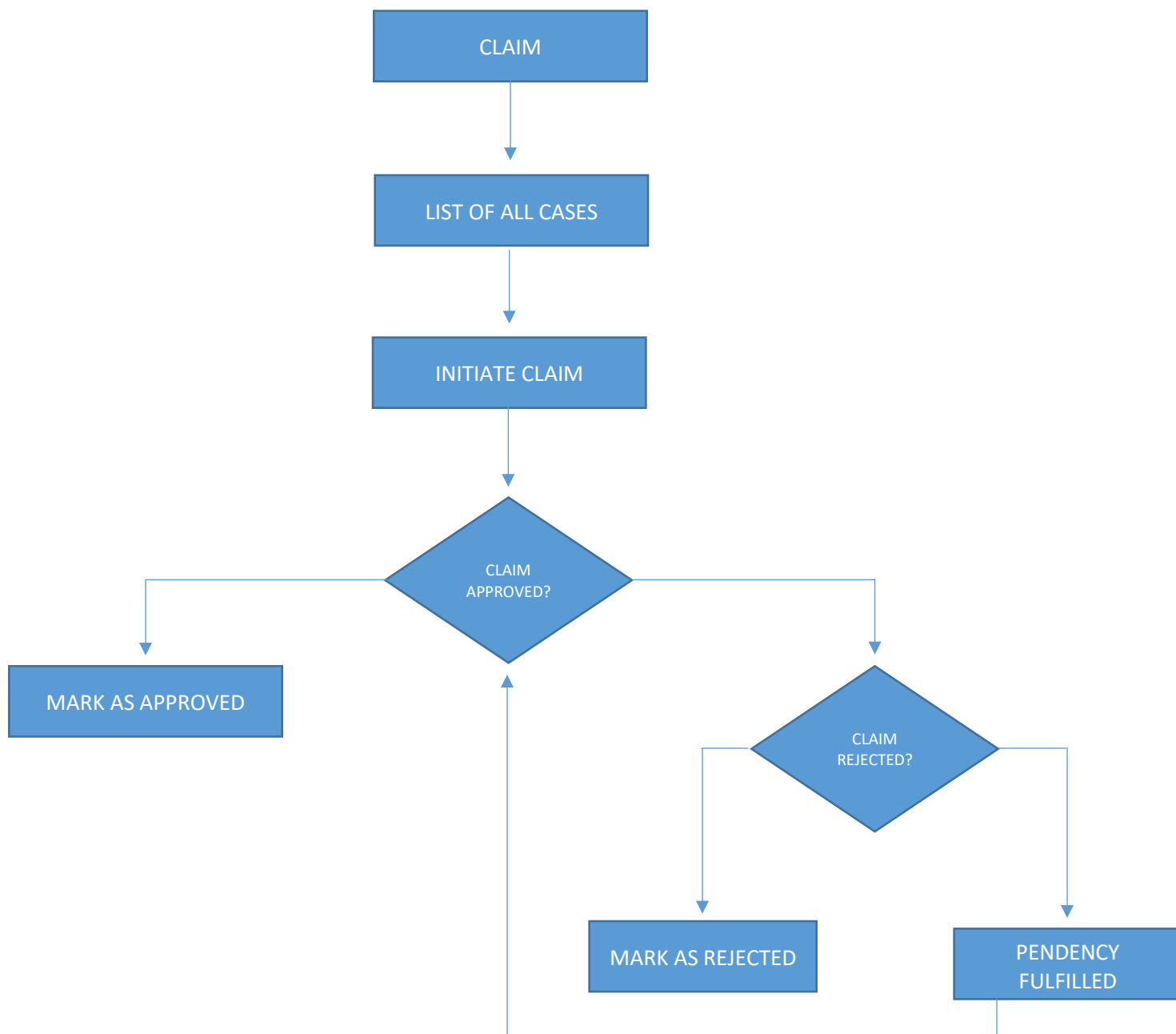
- ANY ENDORSEMENT
- PED ADDITION
- MEMBER ADDITION
- HEALTH CHECKUP

RESUBMIT TO OPERATIONS

SUBMIT

CLAIMS:

- Login to Dashboard.
- Claims would be able to see all the cases throughout.
- Can initiate claim against any case as required.
- Can add documents/images.
- Can make follow-up schedule.
- Can add follow-up reminders.



RENEWALS:

- Login to Dashboard.
- Can see the list of renewals.
- Sort renewals by date range, by week, by month, by year.
- Can add follow up reminder
- Can book renewal.
- Can make updations to policy details.
- Can mark claim as not fulfilled.
- Can add remarks and dispositions.

GRIEVANCES :

- Login to Dashboard.
- Add GRIEVANCES raised by clients.
- Update on Grievances
- Maintain Grievances as a thread.
- Mark as completed.

MASTER ADMIN:

- Staff Management
- Permissions and role management
- Reports in downloadable format:

- Master data
- Underwriting
- Operations
- Services
- Claims
- Renewals

OTHER IMPORTANT FEATURES

- Responsive Web Design.
- Mobile Friendly Interface.
- MD5/SHA1 Security Protocol.
- Management of multiple policy numbers year by year for single policy renewals.
- Manage PEDs.
- Manage Addition/Deletion of Members and other details.
- Active/Deactive users.