

Business Process Document

Document 1	Title: New Proposal Refund Process	
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Revision 0.1	Prepared By: Neelam Singh	Date Prepared: 23/4/2014
Effective Date:	Reviewed By:	Date Reviewed:

1. INTRODUCTION

1.1 Purpose of the functionality

To explain the process of New Proposal premium Refund Process in the system.

1.2 Responsibilities:

Quality checker.

Approver

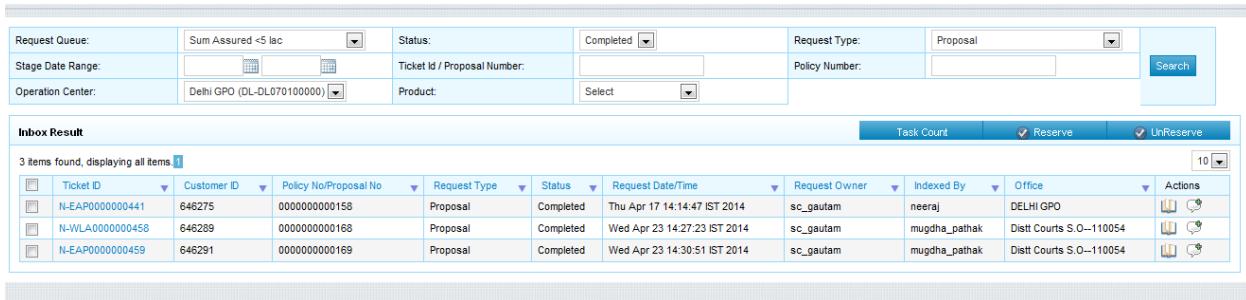
Disbursement Indexer and Approver

2. PROCESS DESCRIPTION

2.1 Process Detail

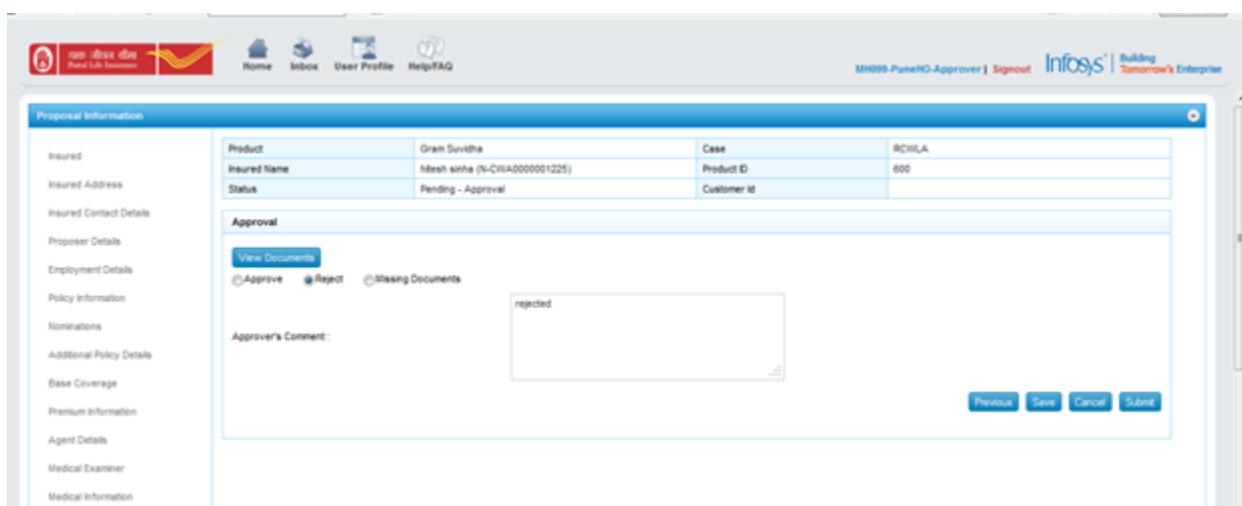
2.1.1 Rejection of proposal by Approver.

- Log in with Approver credentials and click on Inbox icon.



Inbox Result									
Task Count <input checked="" type="checkbox"/> Reserve <input checked="" type="checkbox"/> UnReserve									
10 <input type="checkbox"/>									
3 items found, displaying all items <input type="checkbox"/>									
Ticket ID	Customer ID	Policy No/Proposal No	Request Type	Status	Request Date/Time	Request Owner	Indexed By	Office	Actions
N-EAP0000000441	646275	000000000158	Proposal	Completed	Thu Apr 17 14:14:47 IST 2014	sc_gautam	neeraj	DELHI GPO	
N-WLA0000000458	646289	000000000168	Proposal	Completed	Wed Apr 23 14:27:23 IST 2014	sc_gautam	mugdha_pathak	Distt Courts S.O--110054	
N-EAP0000000459	646291	000000000169	Proposal	Completed	Wed Apr 23 14:30:51 IST 2014	sc_gautam	mugdha_pathak	Distt Courts S.O--110054	

- Click on Proposal number. Proposal will be open in the NBF application. On approver page Reject the application, providing the comments.



Product	Gram Suvidha	Case	RCWLA
Insured Name	Mesh sinha (I-CWA000001225)	Product ID	600
Status	Pending - Approval	Customer Id	

Approval

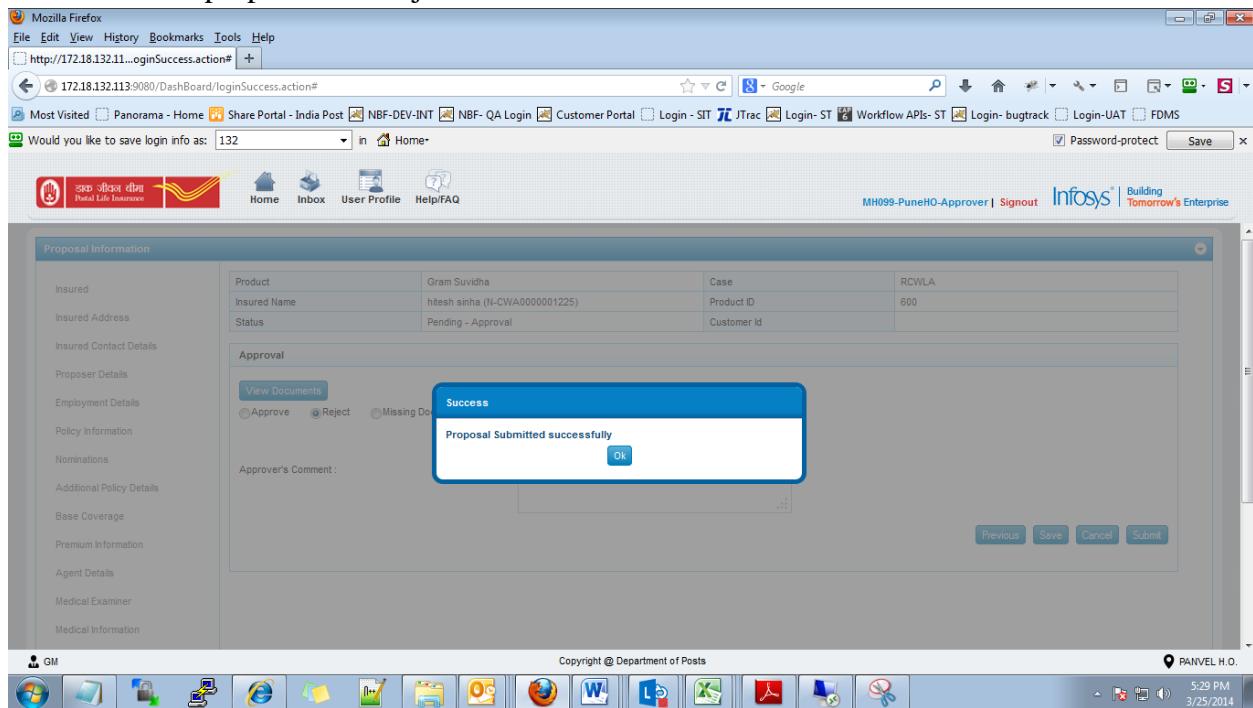
Approve Reject Missing Documents

Approver's Comment:

rejected

[Previous](#) [Save](#) [Cancel](#) [Submit](#)

- Submit proposal after rejection.



Product	Gram Suvidha	Case	RCWLA
Insured Name	hitesh sinha (I-CWA000001225)	Product ID	600
Status	Pending - Approval	Customer Id	

Approval

Approve Reject Missing Documents

Approver's Comment:

Proposal Submitted successfully

[Previous](#) [Save](#) [Cancel](#) [Submit](#)

- Proposal Rejected Status can be seen:

Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://172.18.132.11...oginSuccess.action# +

172.18.132.113:9080/DashBoard/loginSuccess.action#

Most Visited Panorama - Home Share Portal - India Post NBF-DEV-INT NBF- QA Login Customer Portal Login - SIT JT Trac Login- ST Workflow APIs- ST Login- bugtrack Login- UAT FDMs

Would you like to save login info as: 132 in Home Password-protect Save

Home User Profile HelpFAQ

MH160-AundhCamp-Indexer | Signout Infosys Building Tomorrow's Enterprise

Proposal Information

Insured	Product Gram Suvidha	Case RCWLA
Insured Name hitesh sinha (NI-CWA000001225)	Product ID 600	
Status Final - Rejected by Approver	Customer Id	

Insured

View Documents

Salutation: Mr.	First Name: * hitesh	Search
Middle Name:	Last Name: sinha	
Gender: * Male	Marital Status: * Unmarried	
Father's Name: * kumar	Spouse Name:	
Date of Birth: * 01/01/1984	Birth Certificate No.:	
Age proof: * Birth Certificate	Nationality: * Indian	
Aadhar Id:	Mark 1:	Mark 2:

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PALASDARI EDBO

Head of CPC

5:30 PM 3/25/2014

- Rejection letter will be generated.

Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://172.18.132.11...oginSuccess.action# +

172.18.132.113:9080/DashBoard/loginSuccess.action#

Most Visited Panorama - Home Share Portal - India Post NBF-DEV-INT NBF- QA Login Customer Portal Login - SIT JT Trac Login- ST Workflow APIs- ST Login- bugtrack Login- UAT FDMs

Would you like to save login info as: 132 in Home Password-protect Save

Home User Profile HelpFAQ

MH160-AundhCamp-Indexer | Signout Infosys Building Tomorrow's Enterprise

Proposal Information

Insured	Product Gram Suvidha	Case RCWLA
Insured Name hitesh sinha (NI-CWA000001225)	Product ID 600	
Status Final - Rejected by Approver	Customer Id	

Correspondance

Letter Name	Document Id	Document Type	Letter Date
Proposal Rejection		LETTER	2014-03-25 17:33:23.0

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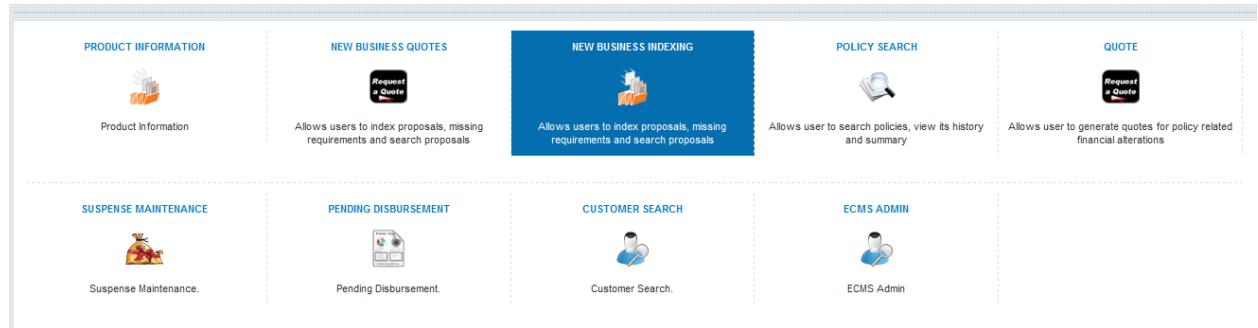
PALASDARI EDBO

Head of CPC

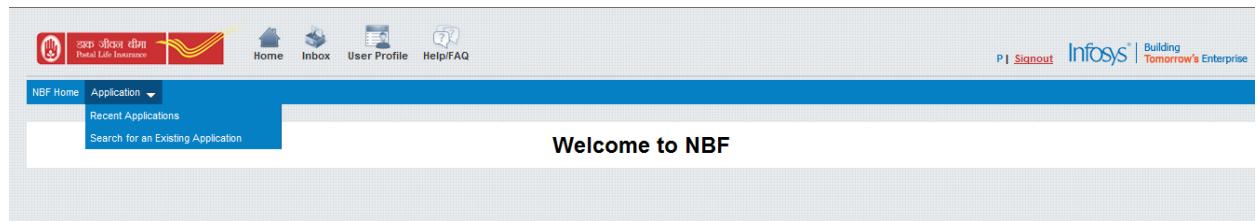
5:34 PM 3/25/2014

2.1.2 Withdrawal of proposal by Customer

- Log in with QC/Approver credentials and click on ‘New Business Indexing’ icon.



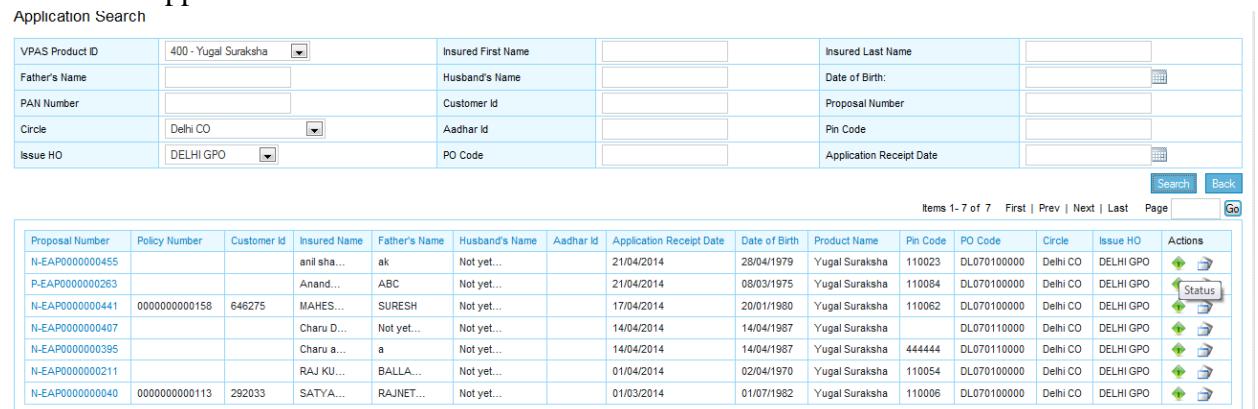
- Click on Search and existing application. Search the Proposal number for which is withdrawn.



The screenshot shows the NBF application interface with the following elements:

- Header:** Postal Life Insurance, Home, Inbox, User Profile, Help/FAQ, Signout, Infosys Building Tomorrow's Enterprise.
- Navigation Bar:** NBF Home, Application ▾ (Recent Applications, Search for an Existing Application).
- Welcome Message:** Welcome to NBF.

- Search the application. And click on Status Icon



The screenshot shows the Application Search interface and a list of applications with status icons:

Application Search:

VPAS Product ID	400 - Yugal Suraksha	Insured First Name		Insured Last Name	
Father's Name		Husband's Name		Date of Birth	
PAN Number		Customer Id		Proposal Number	
Circle	Delhi CO	Aadhar Id		Pin Code	
Issue HO	DELHI GPO	PO Code		Application Receipt Date	

Status Change:

Proposal Number	Policy Number	Customer Id	Insured Name	Father's Name	Husband's Name	Aadhar Id	Application Receipt Date	Date of Birth	Product Name	Pin Code	PO Code	Circle	Issue HO	Actions
N-EAP0000000455			anil sha...	ak	Not yet...		21/04/2014	28/04/1979	Yugal Suraksha	110023	DL070100000	Delhi CO	DELHI GPO	
P-EAP0000000263			Anand...	ABC	Not yet...		21/04/2014	08/03/1975	Yugal Suraksha	110084	DL070100000	Delhi CO	DELHI GPO	
N-EAP0000000441	000000000158	646275	MAHES...	SURESH	Not yet...		17/04/2014	20/01/1980	Yugal Suraksha	110062	DL070100000	Delhi CO	DELHI GPO	
N-EAP0000000407			Charu D...	Not yet...	Not yet...		14/04/2014	14/04/1987	Yugal Suraksha	DL070110000	Delhi CO	DELHI GPO		
N-EAP0000000395			Charu a...	a	Not yet...		14/04/2014	14/04/1987	Yugal Suraksha	444444	DL070110000	Delhi CO	DELHI GPO	
N-EAP0000000211			RAJ KU...	BALLA...	Not yet...		01/04/2014	02/04/1970	Yugal Suraksha	110054	DL070100000	Delhi CO	DELHI GPO	
N-EAP0000000040	000000000113	292033	SATY A...	RAJNET...	Not yet...		01/03/2014	01/07/1982	Yugal Suraksha	110006	DL070100000	Delhi CO	DELHI GPO	

- Change the status and provide the comments for changing the status.

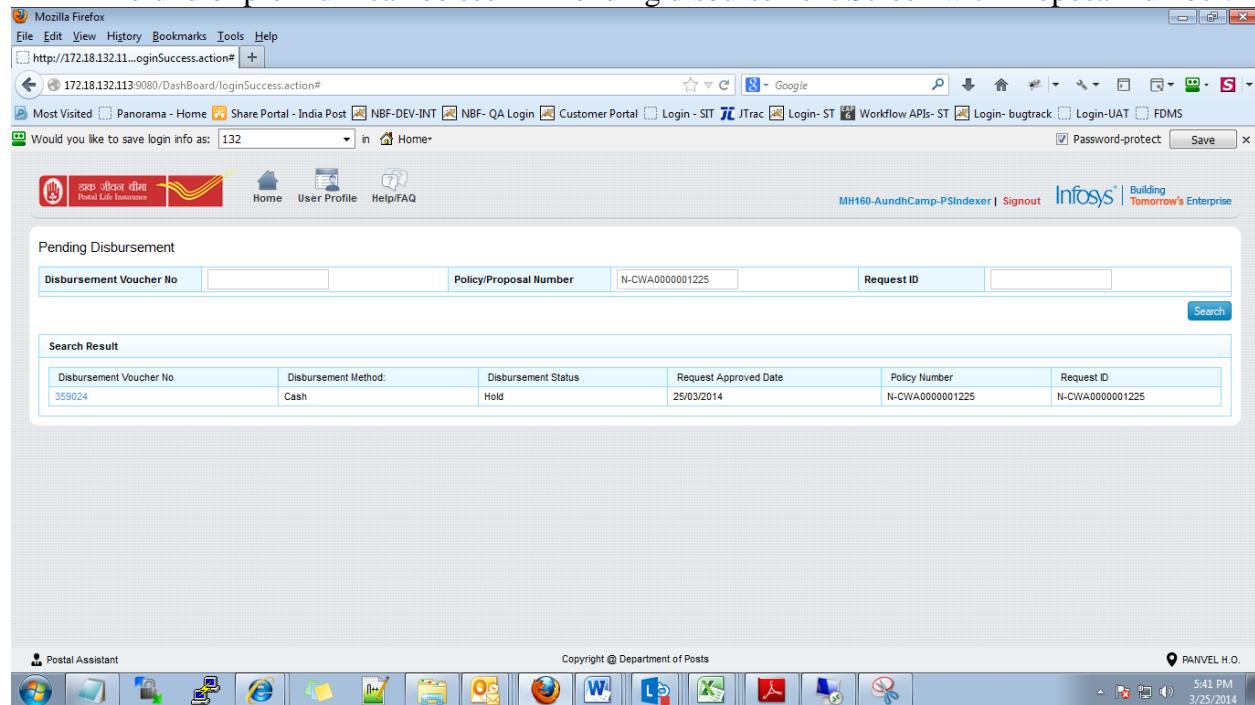
Status Change

Current Status :	Pending - Approval
New Status :	Final - Not Taken <input type="button" value="▼"/>
Comment : *	withdrawn by customer

- Click on continue. Status of the proposal will change. No further changes will be allowed on that proposal.

2.1.3 Refund of premium through Pending disbursement Screen

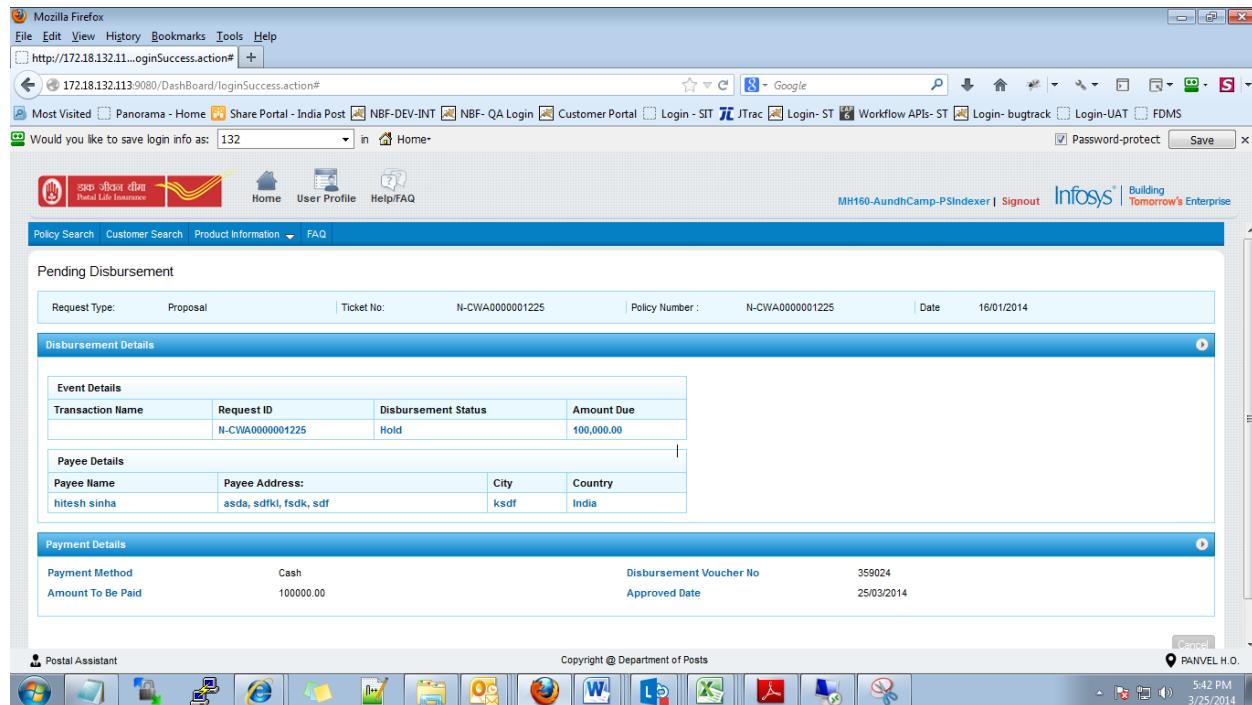
- Refund of premium can be seen in Pending disbursement Screen with Proposal number:



Pending Disbursement

Disbursement Voucher No	Disbursement Method:	Disbursement Status	Request Approved Date	Policy Number	Request ID
359024	Cash	Hold	25/03/2014	N-CWA0000001225	N-CWA0000001225

- Details of the refund visible with voucher number. Indexer and Approver for pending disbursement have to process the disbursement further.



3. INCIDENT HISTORY

Incident against which the document is shared (FDMS ticket no/ MeOps ticket no/Email attachment)	Brief description of the Incident	Document Shared date	Comments on the documented procedure from PLI users.

4. CHANGE HISTORY

Version	Date	Change Description
0.1	23/04/2014	Draft for review