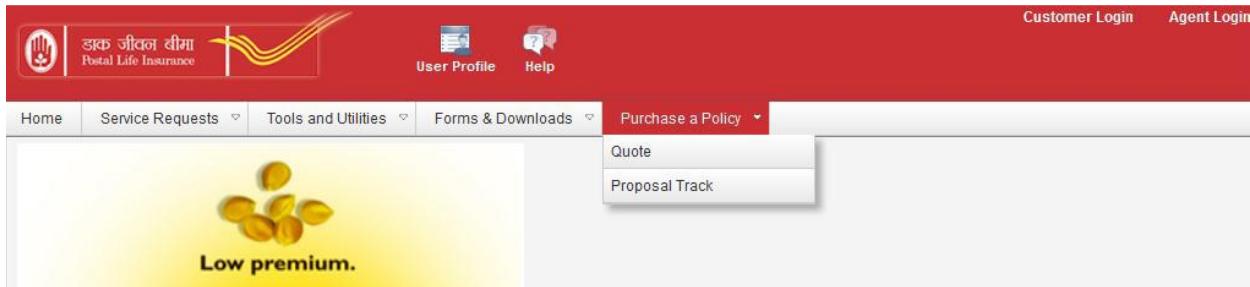


Process Document for Customer Portal Proposals

Step 1: The screenshot below shows the PLI site's Home page where a new or existing customer can purchase a policy by submitting a proposal



Step 2: Quote and application screen will appear as follows

A screenshot of the PLI Customer Portal "Quote & Application" screen. The browser title bar shows "https://pli.indiapost.gov.in/CustomerPortal/loadQuotePage.action". The page header includes the PLI logo, a "Help" link, and a "Login" button. The main content area is titled "Quote & Application". It contains a form for starting a new quote, with fields for Date of Birth (09/03/1982), Product Type (PLI), Sum Assured (1200000), Occupation (State Govt), Monthly Expenditure, Gender (Male), Product Name (Suraksha), Premium Ceasing age (58), Monthly Income (1 to 11999), and State (Maharashtra). Below this is a section titled "Information About You" with fields for Name (Test), E-mail Address (abc@gmail.com), Mobile Number (9652142222), and Pin Code (411057). A CAPTCHA field displays "0b3lc" with a "Refresh" button and a note "Please enter the letters as shown". A "Get Quote" button is at the bottom right.

Screenshot of the Postal Life Insurance Customer Portal showing the quote search results.

Your Quote

Suraksha(Whole Life Assurance)	Sum Assured	Premium Ceasing Age	Monthly Quote	Buy It
Suraksha(Whole Life Assurance)	Rs. 1200000.00	58	Rs. 3060.00	Select

You can also Opt for below Sum Assured

Suraksha(Whole Life Assurance)	Premium Ceasing Age	Monthly Quote	Buy It
Rs.1210000.00	58	Rs 3086.00	Select
Rs.1220000.00	58	Rs 3111.00	Select
Rs.1230000.00	58	Rs 3137.00	Select
Rs.1240000.00	58	Rs 3162.00	Select
Rs.1250000.00	58	Rs 3188.00	Select

List of Documents required for Policy Issuance

- 1.Age Proof
- 2.Address Proof
- 3.Identity Proof
- 4.Declaration of Medical Examiner
- 5.Certificate by Immediate Supervisor
- 6.Certificate by DOFO/PLI/AGENT
- 7.Declaration of Proponent
- 8.Declaration of Spouse

*Disclaimer "Exclusive of service tax premium"

javascript:void(0) Proceed To Buy Recalculate

Step 3: Customer need to fill the required details and pay the initial premium.

Screenshot of the Postal Life Insurance Customer Portal showing the payment details step.

Applicant Information

To issue the policy, complete the application information in the form below and click 'Next'. All data is submitted over the secure connection.

1 Payment Details **2 Confirm Premium Amount**

Payment Details	
Product Name	Suraksha
Product Type	Whole Life Assurance(WLA)
Premium Ceasing Age	58
Premium Amount	3060.00
Frequency	Monthly

Proceed to Payment Skip Payment and Submit

After paying premium, submit the proposal.

The screenshot shows a web browser window with the URL <https://pli.indiapost.gov.in/CustomerPortal/selectedQuoteAction#no-back-button>. The page is titled "Customer Portal". A modal dialog box is centered on the screen with the title "Skip Payment". The dialog asks, "Are you sure you want to proceed with the proposal without making premium payment? If yes, request you to ensure that you make the payment at the nearest Post Office." It contains two buttons: "Yes" and "No". In the background, there are tabs for "Payment Details" and "Confirm Premium Amount". On the left sidebar, there are links for "Personal Information", "Correspondence Information", "Employment Details", "Nominee Details", "Insurance History", "Medical History", "Base Coverage", "Declaration Details", and "Payment Details". At the bottom of the page, there is a footer with the text "Powered by Infosys Ltd.", "Copyright © 2014 Directorate of Postal Life Insurance. All Rights Reserved.", "This website belongs to Department of Posts, Ministry of Communications & Information Technology, Government of India", and "Site Best Viewed in 1024 x 768 resolution".

Proposal number will generate:

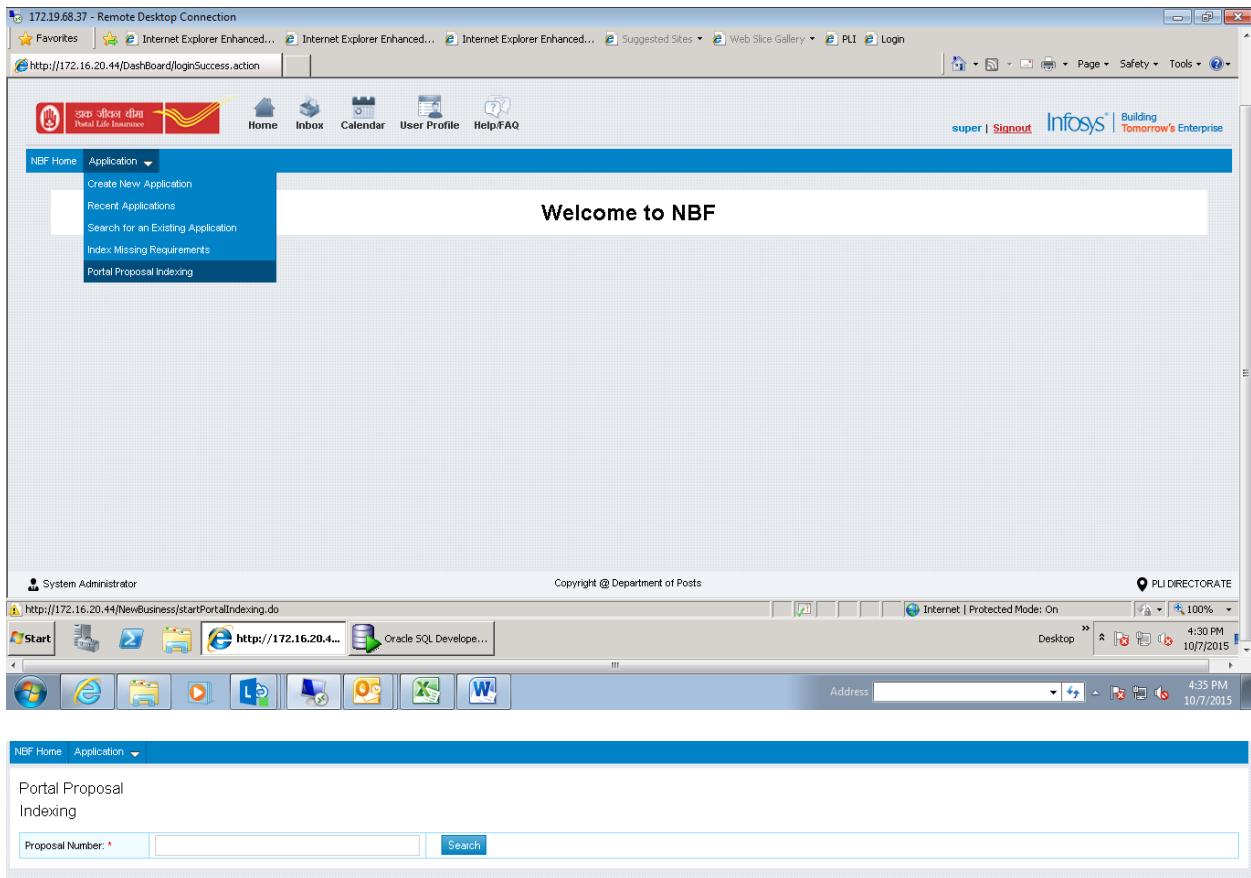
The screenshot shows a web browser window with the URL <https://pli.indiapost.gov.in/CustomerPortal/propsoalInfo.action#no-back-button>. The page is titled "Customer Portal". A success message is displayed: "Congratulations! Your Application has been submitted." It includes the "Request Type : Proposal" and "Proposal number : P-WLA0000002563". Below the message, it says "Thank you for choosing us!" and "Please visit your nearest Post Office along with this Proposal Number and relevant documents." There are "Download PDF" and "Exit" buttons. At the bottom, there is a footer with the text "Powered by Infosys Ltd.", "Copyright © 2014 Directorate of Postal Life Insurance. All Rights Reserved.", "This website belongs to Department of Posts, Ministry of Communications & Information Technology, Government of India", and "Site Best Viewed in 1024 x 768 resolution".

Step 4:

After all the required details are filled and initial premium paid, customer need to print the form and submit it at PO/CPC.

Step 5:

AT PO/CPC, request needs to be indexed using the tab New Business Indexing-Application-Portal proposal Indexing:



Once indexing is done, request will move to ECMS and will reflect in Mccamish.

Step 5:

Indexed Request will reflect in Daily Request Indexed report. And further status can be tracked through Service Index Stage Report.

Process when Policy Service Request is submitted through Customer Portal

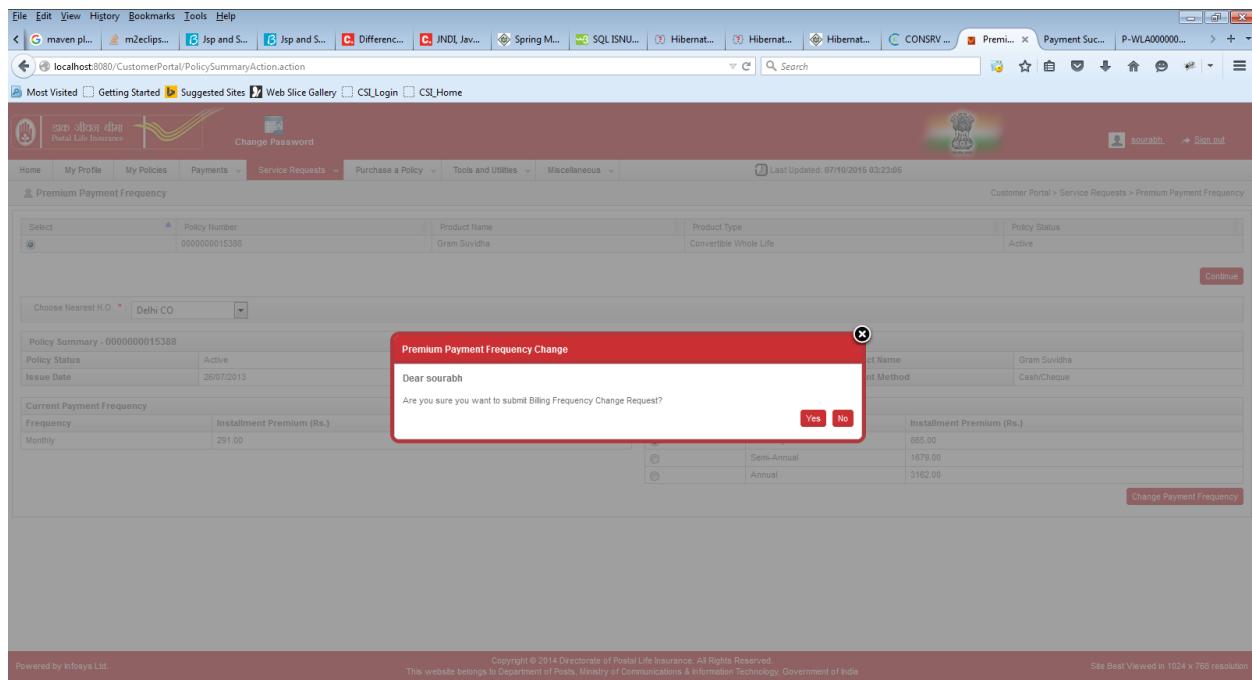
Step 1: Policy service request can be submitted by customer using Customer Portal.

This screenshot shows the homepage of the Postal Life Insurance Customer Portal. At the top, there's a navigation bar with links like 'File', 'Edit', 'View', etc., and a search bar. Below the navigation is a banner with the text 'High Bonus.' and an image of yellow flowers. To the right of the banner is a sidebar titled 'Quick Links' containing links such as 'India Post Website', 'India Post Information', 'Customer Care Centre', 'Pin Code Directory', 'District/Village Search', and 'Holiday Calendar'. The main menu includes 'Service Requests', 'Purchase a Policy', 'Tools and Utilities', and 'Miscellaneous'. A message at the bottom right says 'The Policies of following Head Offices can only be registered.' followed by a list of offices: Delhi CO, GU HO, Karnataka CO, NAGPUR HO, MODA HO, PANVEL H.O., PM HO, SRORI H.O., THANE H.O., and TN CO.

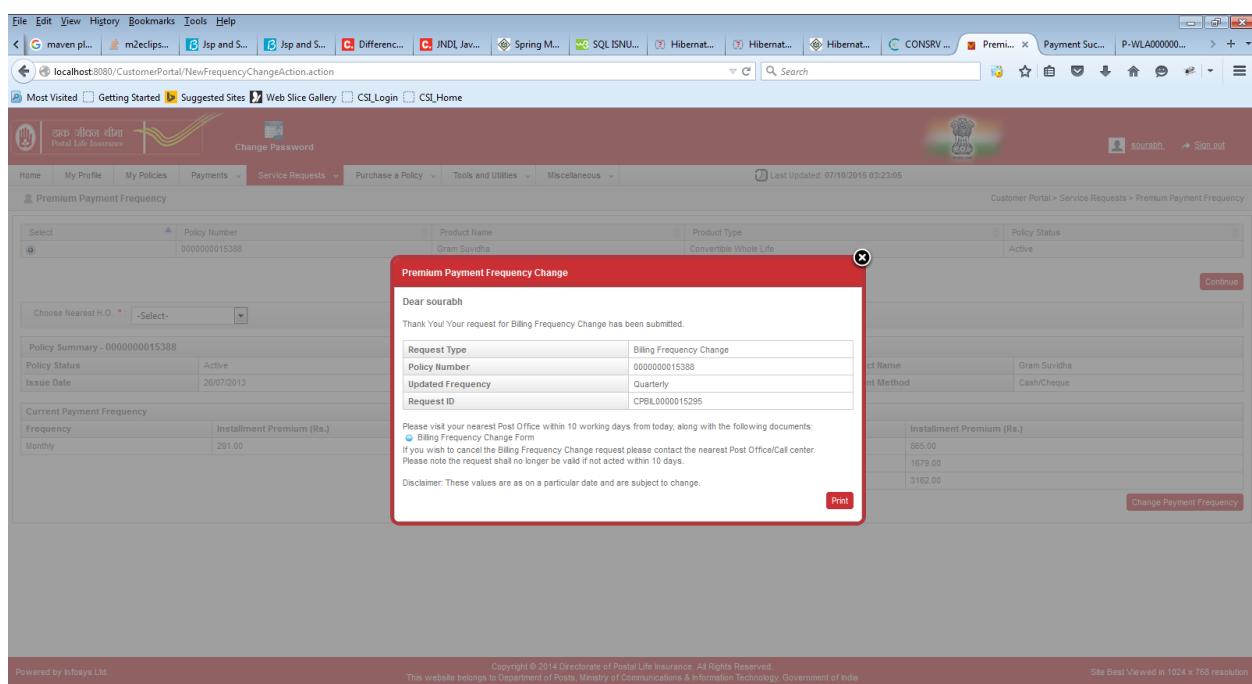
localhost:8080/CustomerPortal/ChangeFrequencyAction.action Copyright © 2014 Directorate of Postal Life Insurance. All Rights Reserved. This website belongs to Department of Posts, Ministry of Communications & Information Technology, Government of India Site Best Viewed in 1024 x 768 resolution

This screenshot shows the 'Premium Payment Frequency' service request page. The top navigation bar and sidebar are identical to the previous screenshot. The main content area has a heading 'Customer Portal - Service Requests > Premium Payment Frequency'. It displays a table with policy details: Policy Number (0000000015388), Product Name (Gram Suvidha), Product Type (Convertible Whole Life), and Policy Status (Active). Below this is a dropdown menu 'Choose Nearest H.O.' with an option '-Select-'. A 'Policy Summary' table shows information like Policy Status (Active), Issue Date (26/07/2013), Insured (sourabh bartakie), Last Premium Paid Till (31/07/2013), Product Name (Gram Suvidha), and Current Method (Cash/Cheque). There are two tables for 'Current Payment Frequency' and 'Update Payment Frequency'. The 'Current Payment Frequency' table shows Frequency (Monthly) and Installment Premium (Rs.) (291.00). The 'Update Payment Frequency' table has columns for Select, Frequency, and Installment Premium (Rs.). Options include Quarterly (665.00), Semi-Annual (1679.00), and Annual (3162.00). A 'Change Payment Frequency' button is located at the bottom right of this section.

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On submission of each request, a request ID is generated along with an Acknowledgement message.



The Acknowledgement message describes the documents required for that service request and maximum time in days before which a customer needs to visit the Post Office.

Step 2: Customer has to visit nearest branch along with required documents within the Turnaround Time mentioned in the Acknowledgement message.

Step 3: AT PO/CPC, request needs to be indexed using the tab service-request indexing-customer portal request

The screenshot shows a web-based form titled "Service Request Indexing". It contains several input fields: "Request Type" with a dropdown menu showing "Customer Portal Requests"; "Policy Number" with a field containing a placeholder "P" and a magnifying glass icon; and "Ticket ID / Proposal Number" with an empty field. Below the form is a blue "Next" button.

Once indexing is done, request will move to ECMS and will reflect in Mccamish.

Step 4:

Indexed Request will reflect in Daily Request Indexed report. And further status can be tracked through Service Index Stage Report.