

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

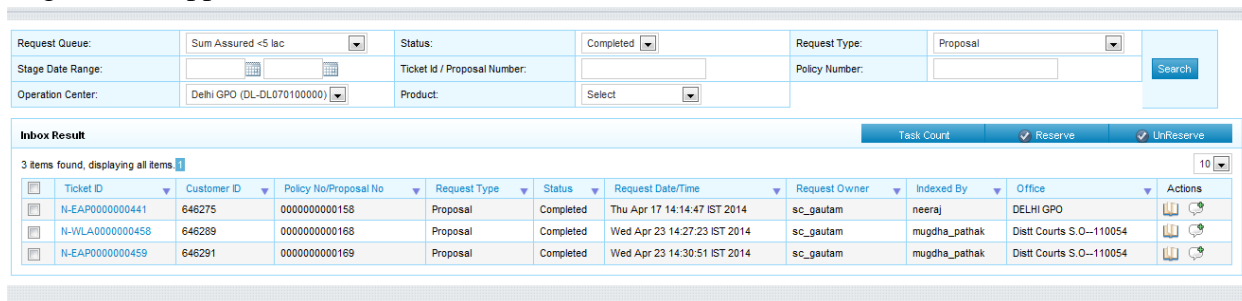
Disbursement Indexer and Approver

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.



The screenshot shows the NBF application interface. At the top, there are search filters for Request Queue, Stage Date Range, Operation Center, Status, Ticket Id / Proposal Number, Request Type, and Policy Number. Below the filters, the 'Inbox Result' section displays a table with 3 items found. The table columns are Ticket ID, Customer ID, Policy No/Proposal No, Request Type, Status, Request Date/Time, Request Owner, Indexed By, Office, and Actions.

Ticket ID	Customer ID	Policy No/Proposal No	Request Type	Status	Request Date/Time	Request Owner	Indexed By	Office	Actions
N-EAP0000000441	646275	0000000000158	Proposal	Completed	Thu Apr 17 14:14:47 IST 2014	sc_gautam	neeraj	DELHI GPO	[Icons]
N-WLA0000000458	646289	0000000000168	Proposal	Completed	Wed Apr 23 14:27:23 IST 2014	sc_gautam	mugdha_pathak	Distt Courts S.O-110054	[Icons]
N-EAP0000000459	646291	0000000000169	Proposal	Completed	Wed Apr 23 14:30:51 IST 2014	sc_gautam	mugdha_pathak	Distt Courts S.O-110054	[Icons]

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

Proposal Information

Product	Gram Suvidha	Case	RCWLA
Insured Name	htesh sinha (N-CWA0000001225)	Product ID	600
Status	Pending - Approval	Customer Id	

Approval

☒ Approve ☒ Reject ☐ Missing Documents

rejected

Approver's Comment :

- Submit proposal after rejection.

Proposal Information

Product	Gram Suvidha	Case	RCWLA
Insured Name	htesh sinha (N-CWA0000001225)	Product ID	600
Status	Pending - Approval	Customer Id	

Approval

☒ Approve ☒ Reject ☐ Missing Documents

rejected

Approver's Comment :

Success

Proposal Submitted successfully

- Proposal Rejected Status can be seen:

Mozilla Firefox
http://172.18.132.11...loginSuccess.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 | JTrac | 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 Help/FAQ MH160-AundhCamp-Indexer | Signout Infosys Building Tomorrow's Enterprise

Proposal Information

Insured	Product	Gram Suvidha	Case	RCWLA
Insured Address	Insured Name	hitesh sinha (N-CWA0000001225)	Product ID	600
Insured Contact Details	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 of Identity

Mark 1: Mark 2:

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- Rejection letter will be generated.

Mozilla Firefox
http://172.18.132.11...loginSuccess.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 | JTrac | Login- ST | Workflow APIs- ST | Login- bugtrack | Login-UAT | FDMS

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Proposal Information

Insured	Product	Gram Suvidha	Case	RCWLA
Insured Address	Insured Name	hitesh sinha (N-CWA0000001225)	Product ID	600
Insured Contact Details	Status	Final - Rejected by Approver	Customer Id	

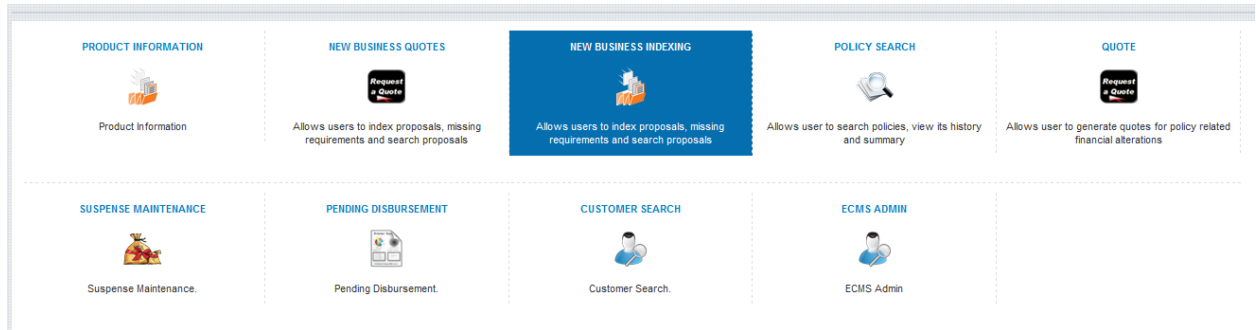
Correspondence

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

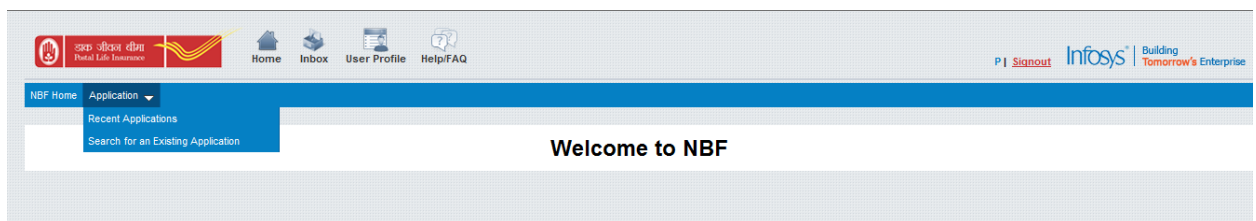
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2.1.2 Withdrawal of proposal by Customer

- 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.



- Search the application. And click on Status Icon

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	

Search Back

Items 1-7 of 7 First Prev Next Last Page Go

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			ani 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	0000000000158	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	00000000000113	292033	SATYA...	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
Comment : *	withdrawn by customer

Continue Cancel

- 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: Policy/Proposal Number: N-CWA0000001225 Request ID:

Search

Search Result

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.

Mozilla Firefox
File Edit View History Bookmarks Tools Help
http://172.18.132.11...loginSuccess.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 JTTrac Login- ST Workflow APIs- ST Login- bugtrack Login-UAT FDMS

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Policy Search Customer Search Product Information FAQ

Pending Disbursement

Request Type: Proposal Ticket No: N-CWA0000001225 Policy Number: N-CWA0000001225 Date: 16/01/2014

Disbursement Details

Event Details			
Transaction Name	Request ID	Disbursement Status	Amount Due
	N-CWA0000001225	Hold	100,000.00

Payee Details

Payee Name	Payee Address:	City	Country
hitesh sinha	asda, sdfkl, fsdk, sdf	ksdf	India

Payment Details

Payment Method	Cash	Disbursement Voucher No	359024
Amount To Be Paid	100000.00	Approved Date	25/03/2014

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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