

Change of Nomination

Definitions:

Nomination: Nomination is an entitlement given to the life insurance policyholder to choose a person or persons / Trust or Trusts to receive the death claim under the policy.

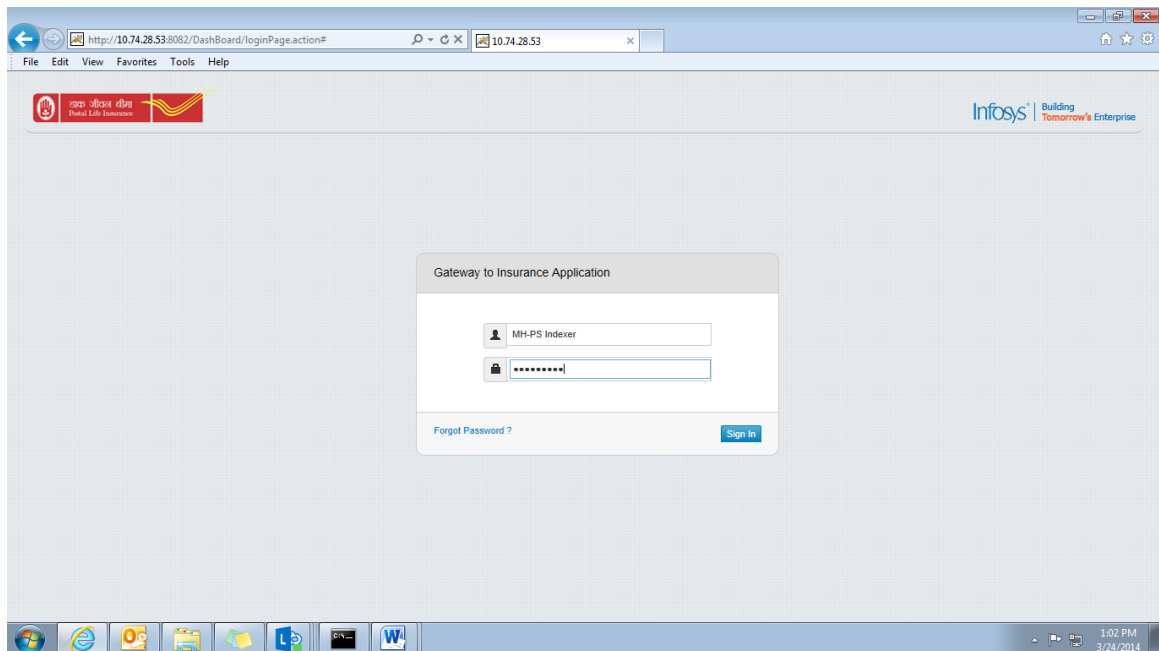
Nominee: The person in whose name nomination is done is called Nominee.

e.g. A person 'x' has taken insurance for him. 'x' has entitled 'y' as nominee for his policy. If person 'x' dies then all the claim money will go to 'y' i.e. nominee of the policy.

Steps to Process a Change of Nomination:

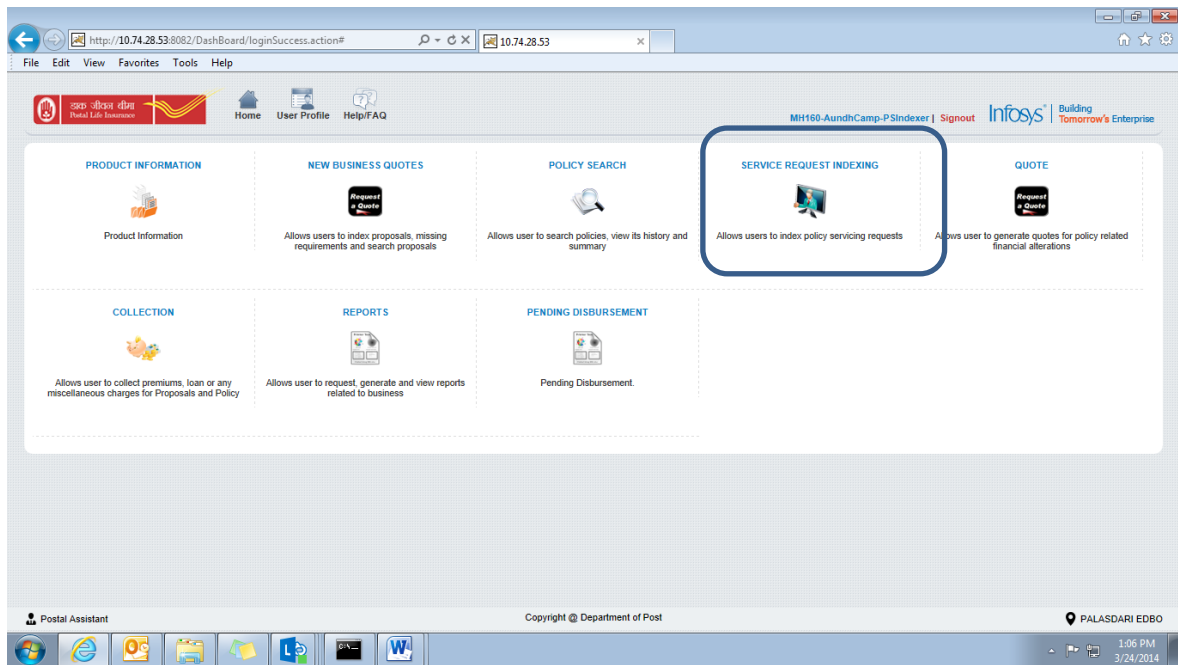
1. Login with credentials of Indexer:

Enter valid credentials of Indexer and login to the application

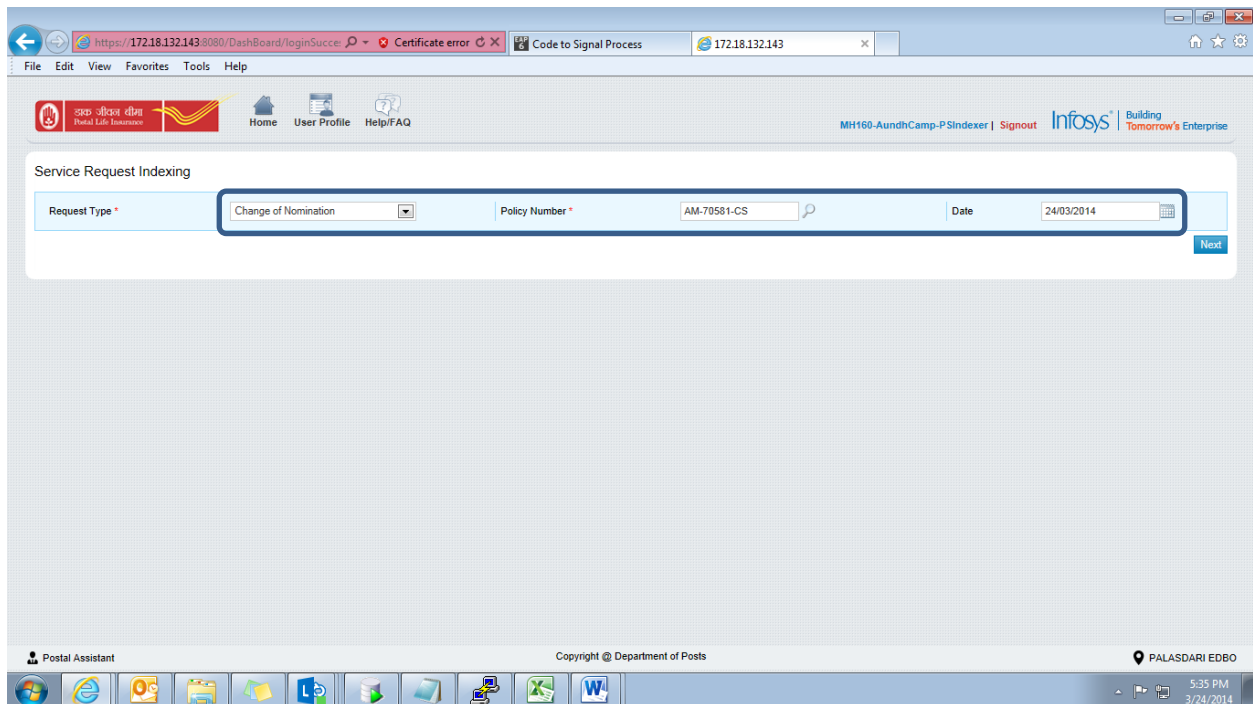


2. Index a request for the Change of Nomination:

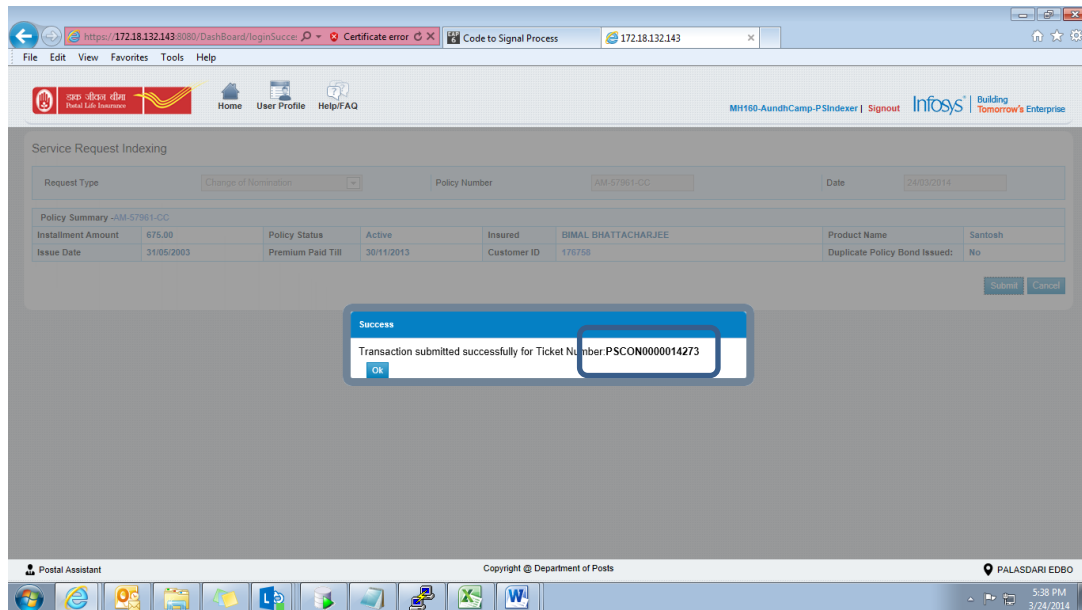
a. After logging into application, click on "Service request Indexing" icon.



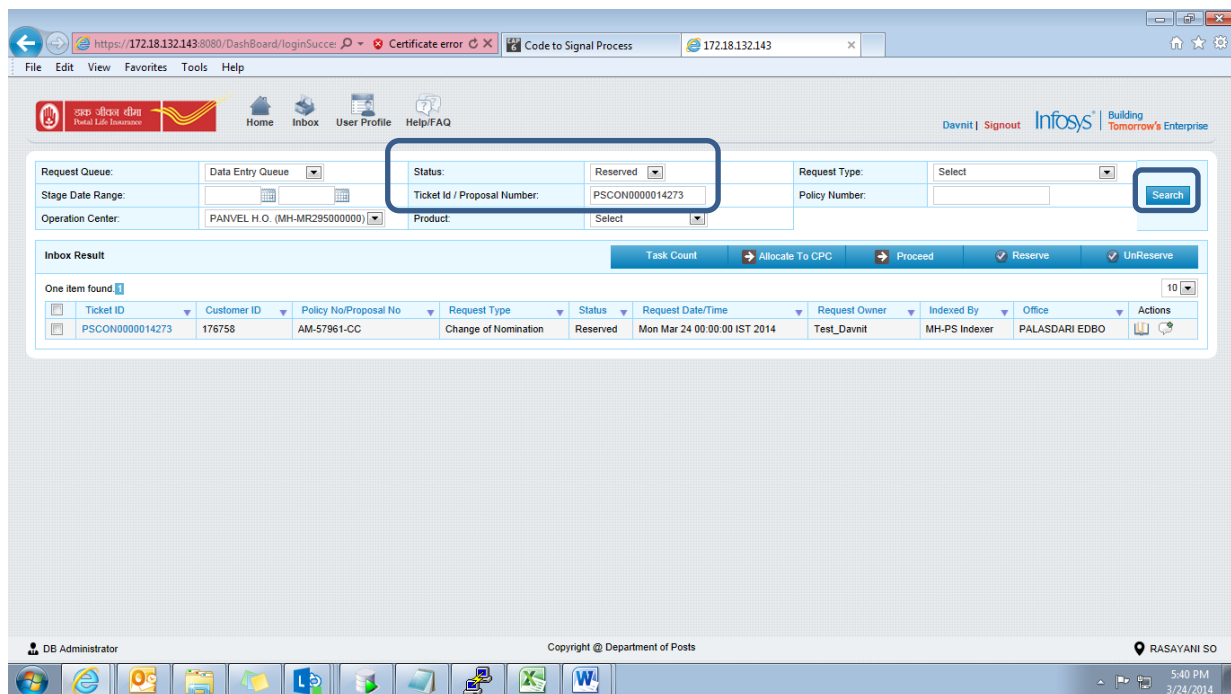
- b. Select request type as “Change of Nomination” from the “Request type Drop-Down”, Enter Policy Number and select today’s Date. Click on Next



- c. On this (Service Request Indexing) screen, policy summary and existing request on the same policy are displayed. Click on Submit. A Ticket ID gets generated. The request is sent for data entry.



- d. Login with data entry credentials into the system, Click on Inbox icon. Enter the ticket ID generated in "Ticket ID/Proposal Number" field. Select Status as "Reserved". Click on search



- e. Click on located Ticket ID link. After clicking the link, system navigates user to data entry screen. Click on “Click here” link.

The screenshot shows a web application interface for policy management. The top navigation bar includes links for Home, Inbox, User Profile, and Help/FAQ. The main content area displays a 'Policy Summary' for policy AM-57961-CC, which is active and insured by BIMAL BHATTACHARJEE. Below this, the 'Nomination Processing' section contains a table with one nominee, DUMMY, with a 100.0% share. A link 'Click here' is highlighted in the text 'Do you want to add Nominee? If yes Click here'. At the bottom, there is a 'List of Documents' section with checkboxes for 'Specimen form of Change of Nomination', 'Trust Document', and 'Notice For Change of Nomination'. The bottom status bar shows the user is a DB Administrator and the system is copyrighted by the Department of Posts.

- f. Select the Nominee type (There can be 2 types of Nominee i. Individual ii. Trust under Trust option there can two more subtypes as Individual and Corporation) and fill in all the mandatory fields on the data entry screen, select all the document checkbox and click on “Add Nominee”. An entry is created in Nomination processing table. Click on Submit to send request to Quality Checker.

The screenshot shows the 'Add Nominee' form, which is a modal window for adding a new nominee. The form is divided into two columns. The left column contains fields for 'Nominee Type' (set to Individual), 'Customer ID', 'First Name' (manoj), 'Last Name' (jadhav), 'Date of Birth' (30/04/1987), 'Percentage Share' (100), 'Email' (jmanoj@yahoo.com), 'Address' (abc street), 'Village' (hinjewadi), 'City' (pune), 'State' (Maharashtra), and 'Pin Code' (566985). The right column contains fields for 'Middle Name' (abc), 'Gender' (Male), 'Age' (26), 'Relationship to Insured' (Son), 'Phone Number' (8554758559), 'Address' (xyz colony), 'Taluka' (mulshi), 'District' (pune), 'Country' (India), and 'Nomination Effective Date' (24/03/2014). An 'Add Nominee' button is located at the bottom right of the form. The background shows the same policy summary as the previous screenshot, but the 'Add Nominee' form is the primary focus.

Request Type: Change of Nomination Ticket No: PSCON0000014273 Policy Number: AM-57961-CC Date: 24/03/2014

Policy Summary -AM-57961-CC

Installment Amount	675.00	Policy Status	Active	Insured	BIMAL BHATTACHARJEE	Product Name	Santosh
Issue Date	31/05/2003	Premium Paid Till	30/11/2013	Customer ID	176758	Duplicate Policy Bond Issued:	No

Nomination Processing

Sr.No.	Customer ID	Nominee Type	First Name	Last Name	Relationship to Insured	Percentage Share	Nomination Effective Date	Action
1	195709	Individual	DUMMY	NAME	Others	100.0	21/03/2014	
2		Individual	pankaj	jadhav	Son	0.0	21/03/2014	

Do you want to add Nominee. If yes [Click here](#)

List of Documents

Please select suitable documents *

☒ Specimen form of Change of Nomination

☐ Trust Document

☒ Notice For Change of Nomination

Request Missing Documents

Document Name	Document Request Date	Status	Received Date	Add New [+]
-Select-	24/03/2014	Pending		

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g. In Case of nominee is deleted the entry is highlighted in red color in “Nomination processing table. There can be more than one and maximum of 3 nominees with total of percentage share as 100

h. Login with Quality Checker Credentials, locate the request ID and check the details filled by data entry. After verifying click on submit the request to Approver.

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Do you want to add Nominee. If yes [Click here](#)

List of Documents

Please select suitable documents *

☒ Specimen form of Change of Nomination

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Document Name	Document Request Date	Status	Received Date	Add New [+]
-Select-	24/03/2014	Pending		

[Submit](#) [Redirect](#) [View Documents](#) [Request Missing Documents](#) [Add Comments](#) [Request History](#) [Cancel](#)

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- i. Login with Approver credentials, locate the request ID and Approve/Reject the request.

The screenshot shows a web application interface for managing insurance requests. The top navigation bar includes links for Home, Inbox, User Profile, and Help/FAQ. The main content area displays a request for change of nomination with the following details:

Customer ID	Nominee Type	First Name	Last Name	Relationship to Insured	Percentage Share
195709	Individual	DUMMY	NAME	Others	100.0
	Individual	pankaj	jadhav	Son	0.0

Below the table, there are sections for 'Appointee Details' and 'List of Documents'. The 'List of Documents' section includes checkboxes for 'Specimen form of Change of Nomination', 'Trust Document', and 'Notice For Change of Nomination'. The 'Request Missing Documents' section shows a table with columns for Document Name, Document Request Date, Status, and Received Date. The 'Approve' button is highlighted with a red circle.

- j. Once a request is approved the details are updated and can be checked from policy summary>>Nomination Details section

The screenshot shows the 'Nominee Details' section of the web application. The section is highlighted with a red circle. The details are as follows:

Nominee Type	Name	Relationship	Date of Birth	CurrentPercentage	Effective Date
Individual	Mr. DUMMY NAME	Others	01/01/1953	100.00	21/03/2014

Below the table, there are sections for 'Assignment Details', 'Survival Benefit Details', and 'Insured Details'. The 'Insured Details' section includes fields for Permanent Address, Phone Number, Email ID, and Correspondence Address. The 'Nominee Details' section is highlighted with a red circle.