

# 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.

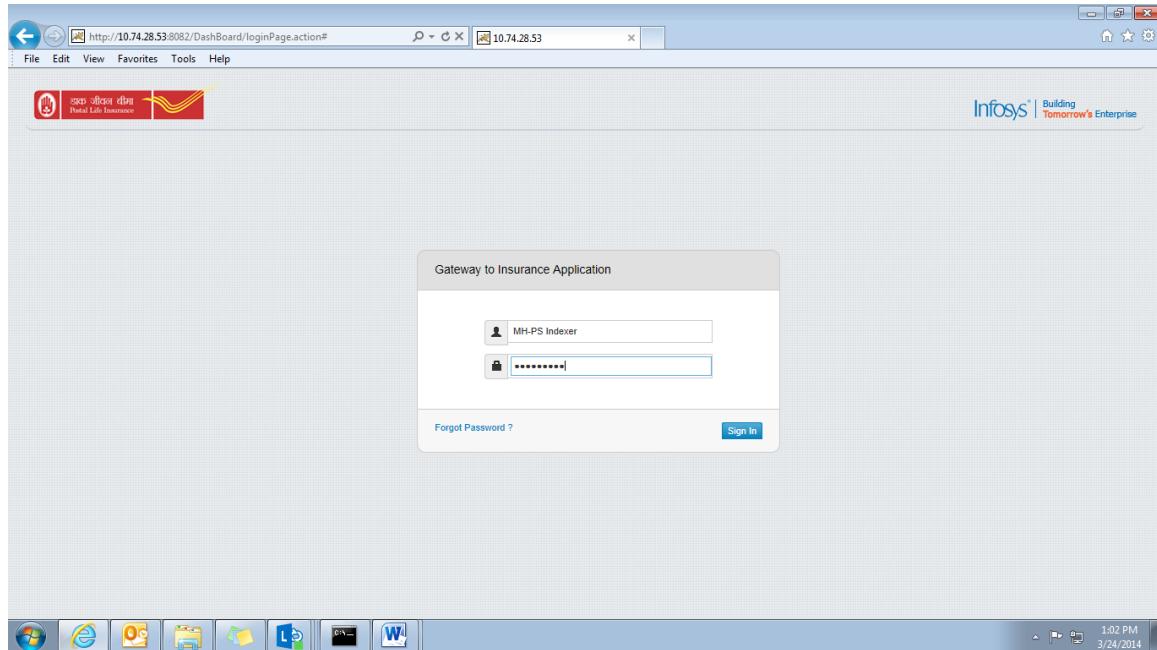
**Nominee:** The person in whose name nomination is done is called Nominee.

**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:

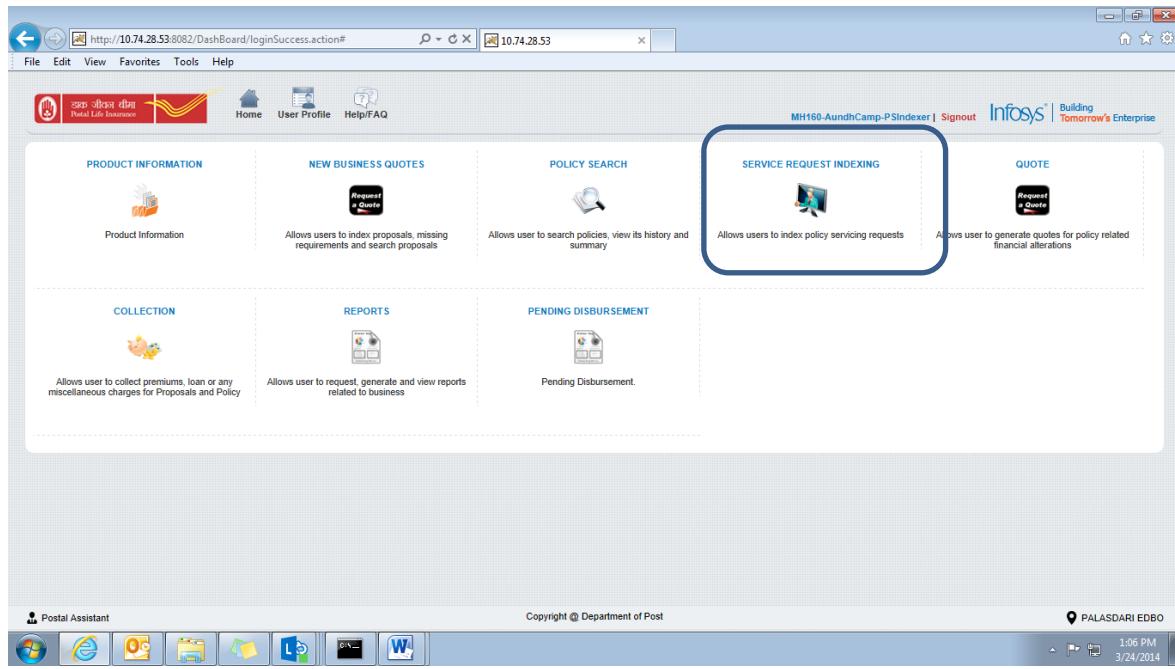
### 1. Login with credentials of Indexer:

Enter valid credentials of Indexer and login to the application



### 2. Index a request for the Change of Nomination:

- 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

The screenshot shows a form titled "Service Request Indexing". The top navigation bar includes icons for Home, User Profile, Help/FAQ, and a signout link. Below the title, there's a search bar with fields for Request Type (set to "Change of Nomination"), Policy Number (set to "AM-70581-CS"), and Date (set to "24/03/2014"). A "Next" button is located at the bottom right of the form area. The bottom of the screen features a toolbar with various application icons and a status bar showing the date and time.

- 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.

The screenshot shows a web browser window with the URL <https://172.18.132.143:8080/DashBoard/loginSuccess>. The page title is "Service Request Indexing". It displays a "Policy Summary" table with the following data:

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

At the bottom right of the table are "Submit" and "Cancel" buttons. A blue modal dialog box titled "Success" contains the message "Transaction submitted successfully for Ticket Number PSCON0000014273" with an "Ok" button. The status bar at the bottom shows "Copyright © Department of Posts" and "PALASDARI EDBO".

- 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

The screenshot shows a web browser window with the URL <https://172.18.132.143:8080/DashBoard/loginSuccess>. The page title is "Inbox Result". The search criteria in the top search bar are highlighted with a red box. The search results table shows one item found:

Ticket ID	Customer ID	Policy No/Proposal No	Request Type	Status	Request Date/Time	Request Owner	Indexed By	Office	Actions
PSCON0000014273	176758	AM-57961-CC	Change of Nomination	Reserved	Mon Mar 24 00:00:00 IST 2014	Test_Davnit	MH-PS Indexer	PALASDARI EDBO	

The status bar at the bottom shows "Copyright © Department of Posts" and "RASAYANI SO".

- 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 a 'Change of Nomination' request. At the top, there's a header with the URL <https://172.18.132.143:8080/DashBoard/loginSuccess>, a 'Certificate error' warning, and a 'Code to Signal Process' button. The main content area has tabs for 'Home', 'Inbox', 'User Profile', and 'Help/FAQ'. On the right, there are links for 'Davnit | Signout' and the Infosys logo. The form itself has sections for 'Request Type' (set to 'Change of Nomination'), 'Ticket No.' (PSCON0000014273), 'Policy Number' (AM-57961-CC), and 'Date' (24/03/2014). Below this is a 'Policy Summary' table with details like 'Installment Amount' (675.00), 'Policy Status' (Active), 'Insured' (BIMAL BHATTACHARJEE), and 'Issue Date' (31/05/2003). The 'Nomination Processing' section contains a table with columns for Sr.No., Customer ID, Nominee Type, First Name, Last Name, Relationship to Insured, Percentage Share, Nomination Effective Date, and Action. One row is present with values: Sr.No. 1, Customer ID 195709, Nominee Type Individual, First Name DUMMY, Last Name NAME, Relationship to Insured Others, Percentage Share 100.0, Nomination Effective Date 31/05/2003, and Action edit/delete. A message at the bottom says 'Do you want to add Nominee? If yes Click here' with a link. Below this is a 'List of Documents' section with checkboxes for 'Specimen form of Change of Nomination', 'Trust Document', and 'Notice for Change of Nomination'. At the bottom right are buttons for 'Submit', 'View Documents', 'Add Comments', 'Request History', and 'Cancel'. The footer includes a DB Administrator icon, a toolbar with various icons, and copyright information: 'Copyright @ Department of Posts' and 'RASAYANI SO'. The date and time are shown as 3/24/2014 5:42 PM.

- f. Select the Nominee type (There can be 2 types of Nominee i. Individual ii. Trust under Trust option there can be 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.

This screenshot shows a detailed 'Add Nominee' form. At the top, it lists existing nominees with their details: Customer ID 195709, Nominee Type Individual, First Name DUMMY, Last Name NAME, and Relationship to Insured Others. Below this is a 'Nominee Type:' section with radio buttons for 'Individual' (selected) and 'Trust'. The 'Individual' section contains fields for Customer ID (manoj), First Name (manoj), Last Name (jadhav), Date of Birth (30/04/1987), Percentage Share (100), Email (jmanoj@yahoo.com), Address (abc street), Village (hinjawadi), City (pune), State (Maharashtra), Pin Code (566985), Middle Name (abc), Gender (Male selected), 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). At the bottom right of the form is a large blue 'Add Nominee' button. The footer includes a DB Administrator icon, a toolbar with various icons, and copyright information: 'Copyright @ Department of Posts' and 'RASAYANI SO'. The date and time are shown as 3/24/2014 5:49 PM.

The screenshot shows a web-based application interface for managing policy nominations. At the top, there's a header with the URL <https://172.18.132.143:8080/DashBoard/LoginSuccess>, a certificate error message, and the Infosys logo. Below the header, there are navigation links for Home, Inbox, User Profile, and Help/FAQ.

The main content area has a title "Nomination Processing". It displays a table with two rows of nomination details:

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	<input type="checkbox"/> <input type="checkbox"/>
2		Individual	pankaj	jadhav	Son	0.0	21/03/2014	<input type="checkbox"/> <input type="checkbox"/>

Below the table, there's a note: "Do you want to add Nominee. If yes Click here".

Under "List of Documents", it says "Please select suitable documents \*". There are three checkboxes:
 

- Specimen form of Change of Nomination
- Trust Document
- Notice For Change of Nomination

At the bottom, there's a "Request Missing Documents" section with a table:

Document Name	Document Request Date	Status	Received Date	Add New [+]
-Select-	24/03/2014	Pending		<input type="button" value="Delete"/>

The status bar at the bottom right shows the location as PANVEL H.O., the time as 5:54 PM, and the date as 3/24/2014.

- 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.

This screenshot shows the same application interface as the previous one, but the nomination table now only contains one row, indicating that the second nomination entry has been deleted.

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	<input type="checkbox"/> <input type="checkbox"/>

The rest of the interface, including the document selection and missing document sections, remains the same as in the first screenshot.

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

The screenshot shows the 'Nomination Processing' section of the application. It displays nomination details for Customer ID 195709, including nominees named DUMMY NAME and pankaj jadhav. Below this is the 'Appointee Details' section. A 'List of Documents' section asks for suitable documents, with 'Specimen form of Change of Nomination' checked. The 'Request Missing Documents' section shows a table with one row for a document requested on 24/03/2014. At the bottom, there are buttons for 'Redirect', 'Approve' (which is highlighted with a blue box), 'Reject', 'View Documents', 'Request Missing Documents', 'Add Comments', 'Request History', and 'Cancel'. The status of the document is 'Pending'.

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

The screenshot shows the 'Policy Summary' section. It displays basic policy information: Premium Amount 675.00, Payment Method Cash/Cheque, Next Premium Date 01/12/2013, and Last Instalment April 2016. The 'Premium Frequency' is listed as 'Monthly' and 'Last Premium Paid On' as 01/11/2013. In the 'Nominee Details' section, the nomination type is 'Individual' and the name is 'Mr. DUMMY NAME'. The 'Insured Details' section includes permanent address (DY COS. NF RLY PANDU GUWAHATI-12 AS 000000), employer (SR CLERK), designation (SR CLERK), phone number, email ID, and correspondence address (DY COS. NF RLY PANDU GUWAHATI-12 AS 000000). The status bar at the bottom indicates the user is 'RASAYANI SO' and the date is 3/24/2014.