Business Process Document	
Document 1	Title: New Proposal Refund Process

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:

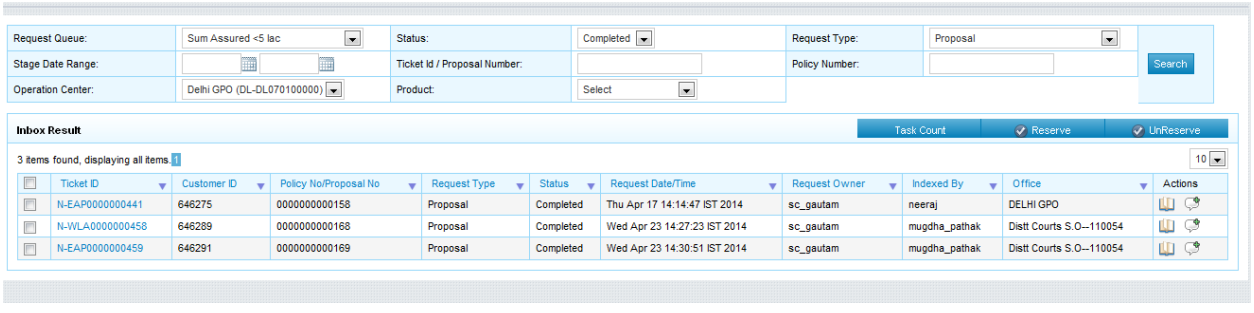
Quality checker.
Approver
Disbursement Indexer and Approver

2. PROCESS DESCRIPTION

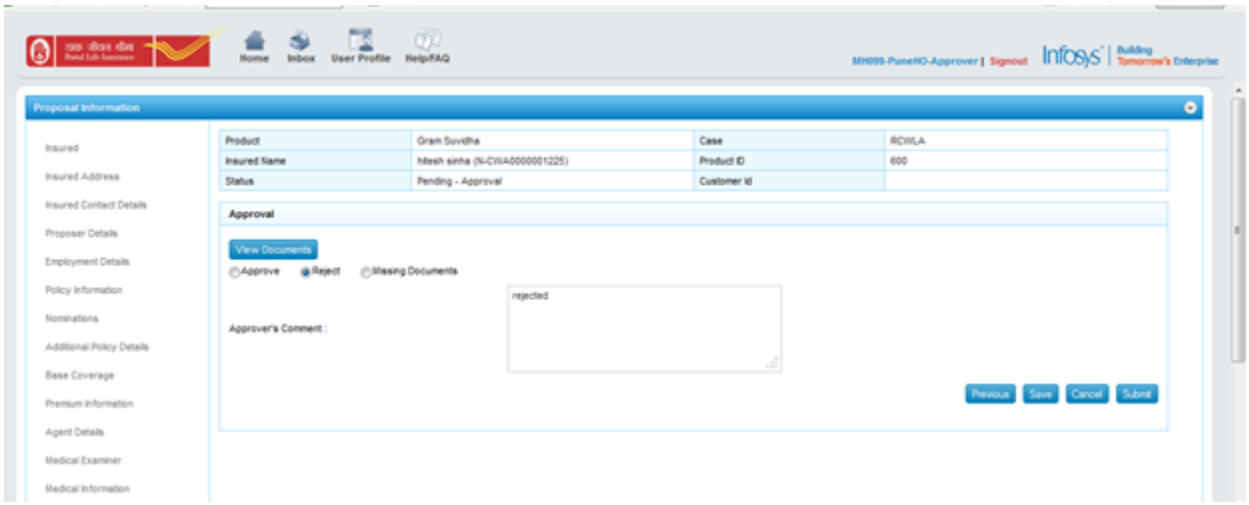
2.1 Process Detail

2.1.1 Rejection of proposal by Approver.

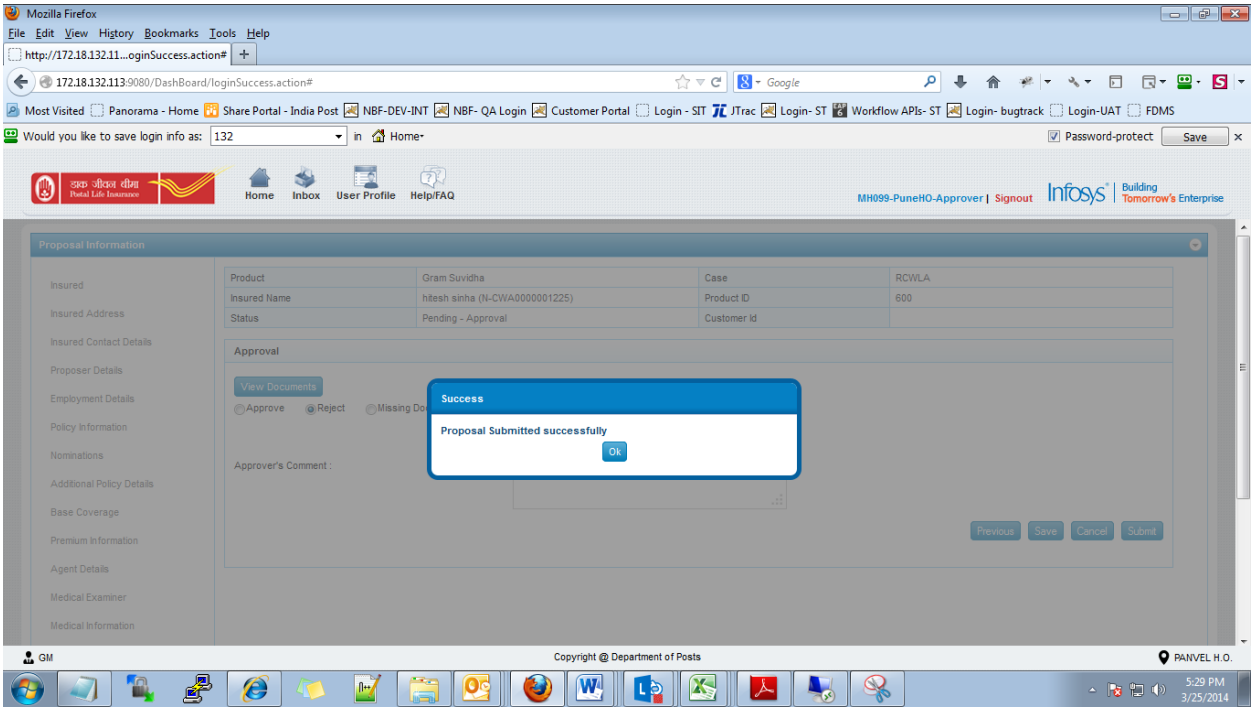
- Log in with Approver credentials and click on Inbox icon.



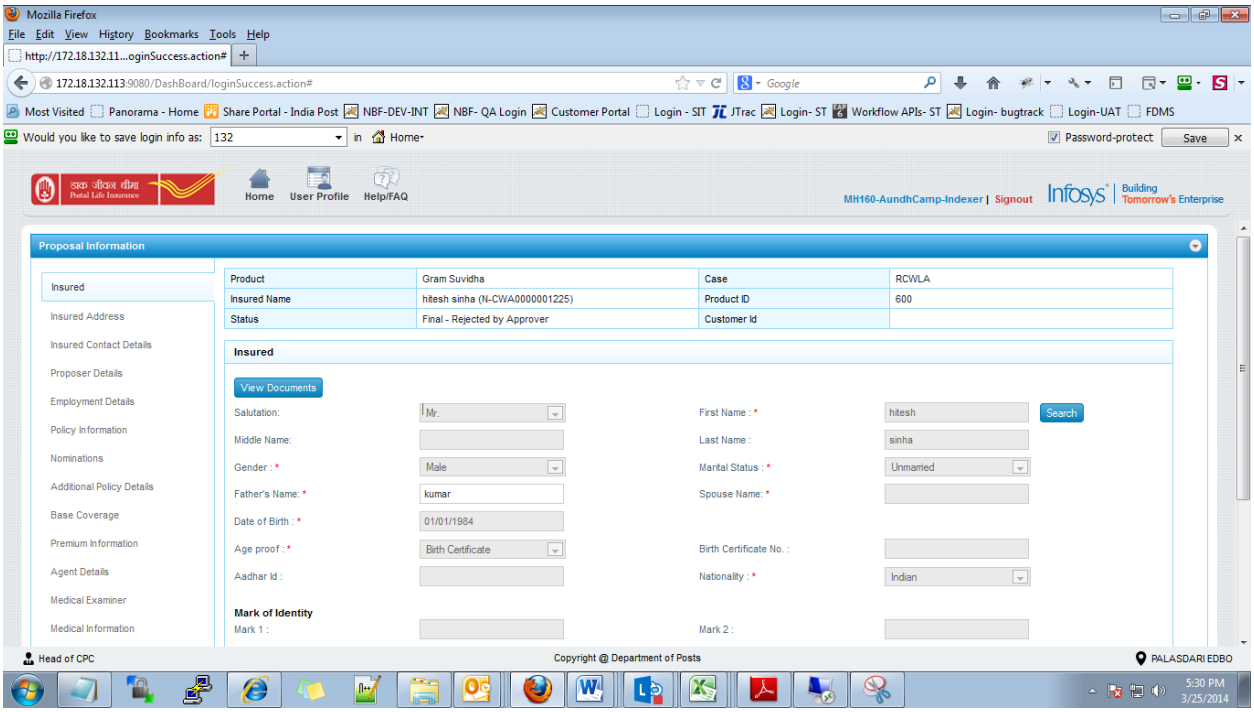
- Click on Proposal number. Proposal will be open in the NBF application. On approver page Reject the application, providing the comments.



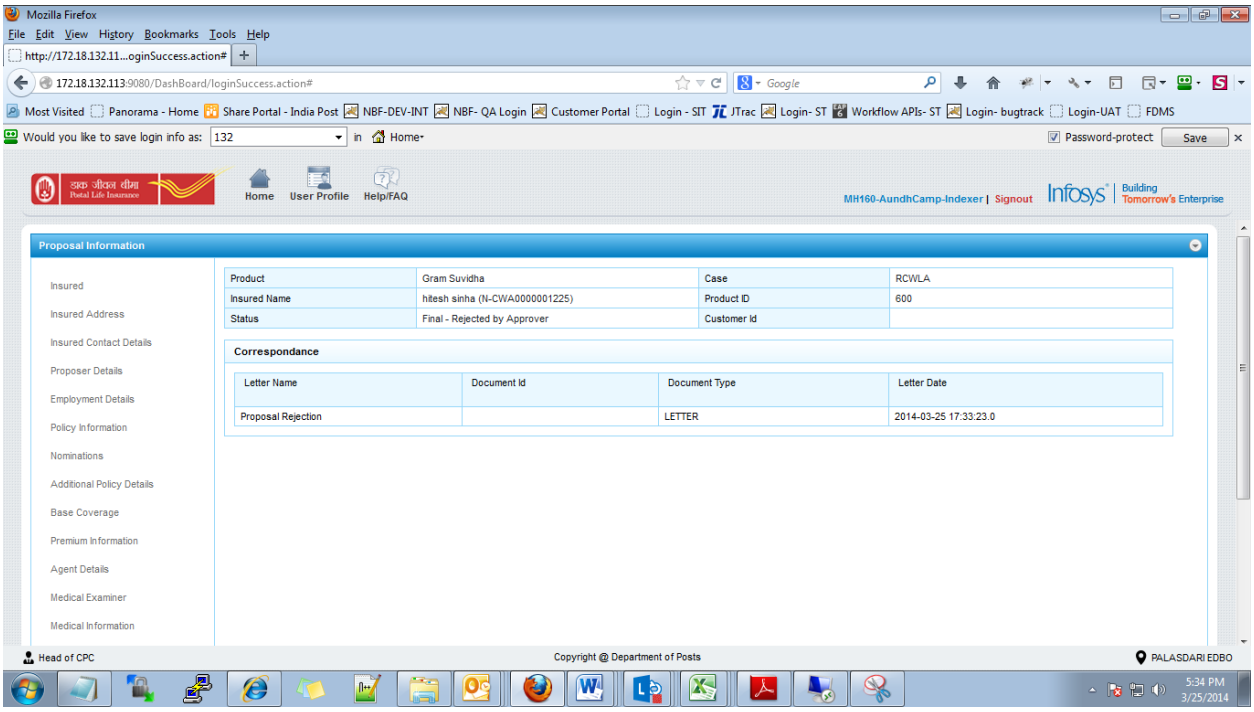
- Submit proposal after rejection.



- Proposal Rejected Status can be seen:

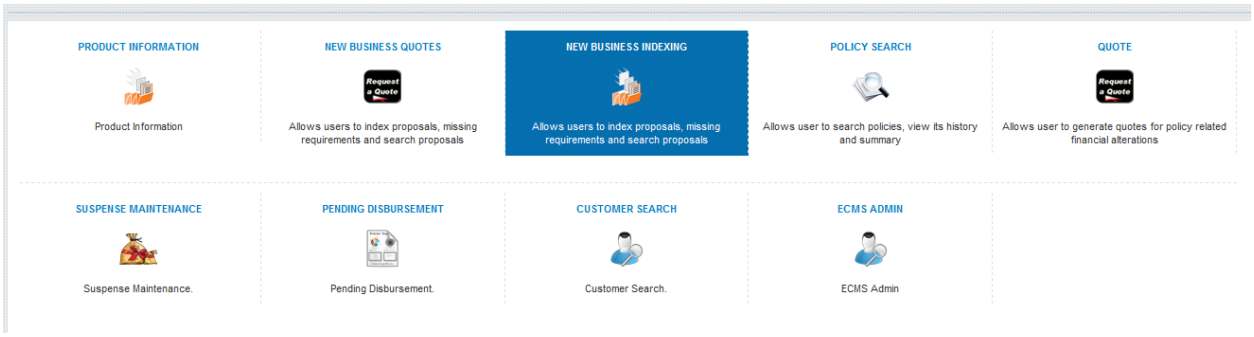


- Rejection letter will be generated.

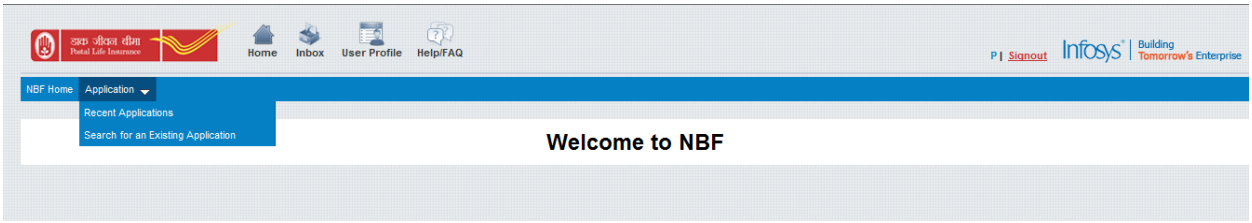


2.1.2 Withdrawal of proposal by Customer

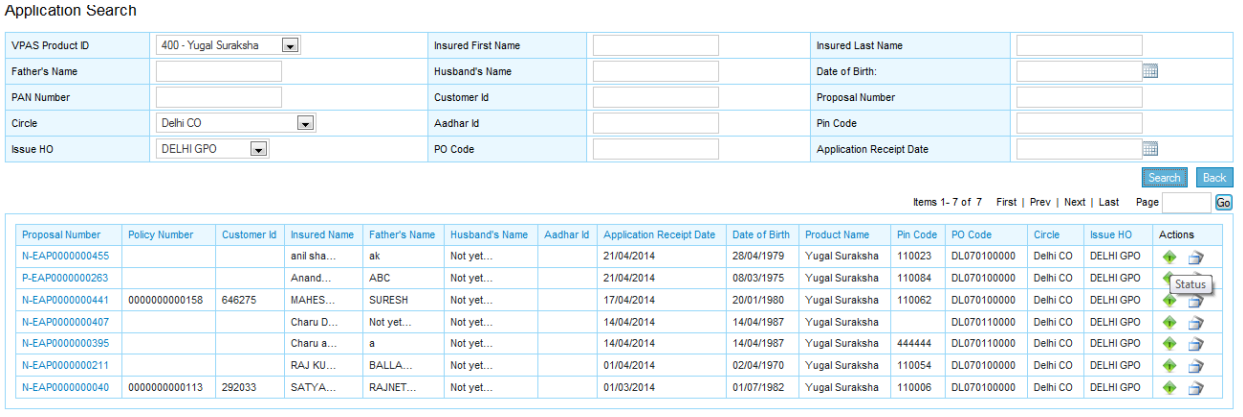
- Log in with QC/Approver credentials and click on 'New Business Indexing' icon.



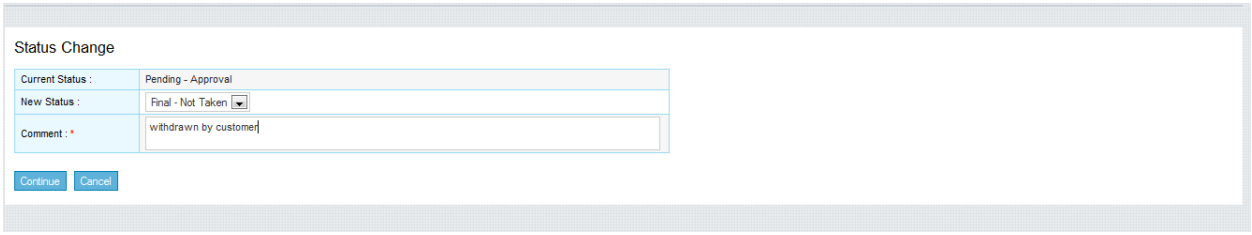
- Click on Search and existing application. Search the Proposal number for which is withdrawn.



- Search the application. And click on Status Icon



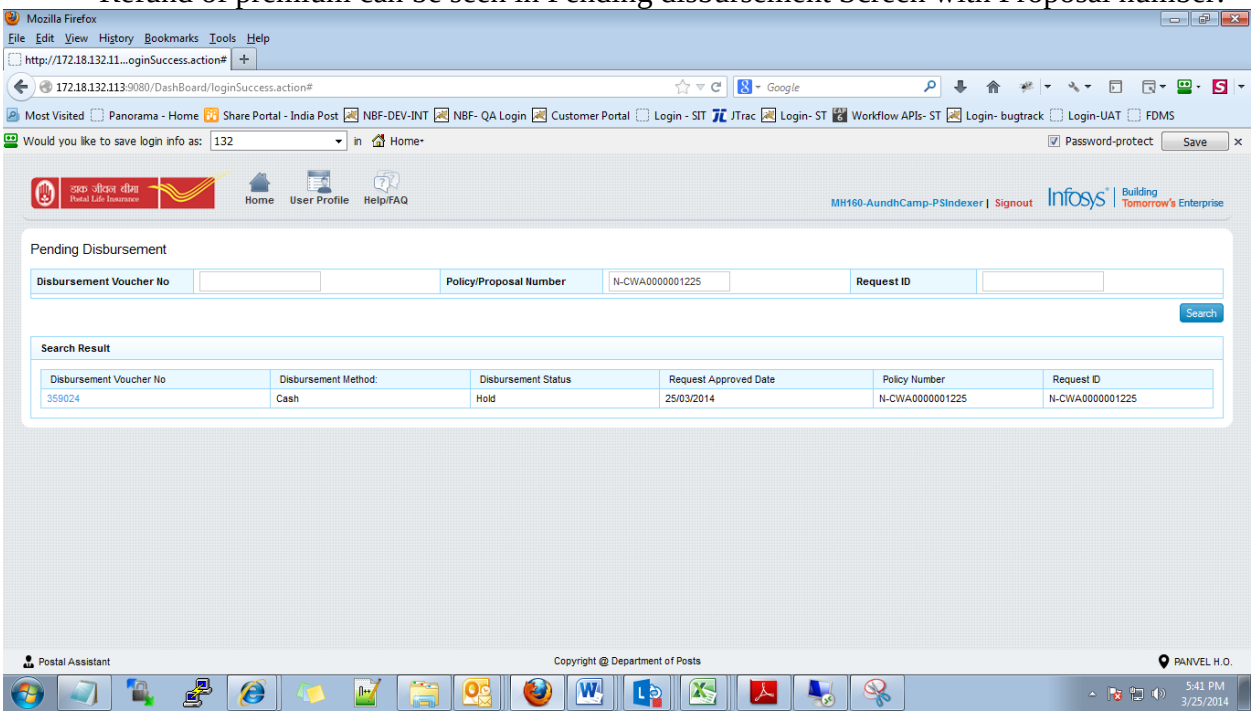
- Change the status and provide the comments for changing the status.



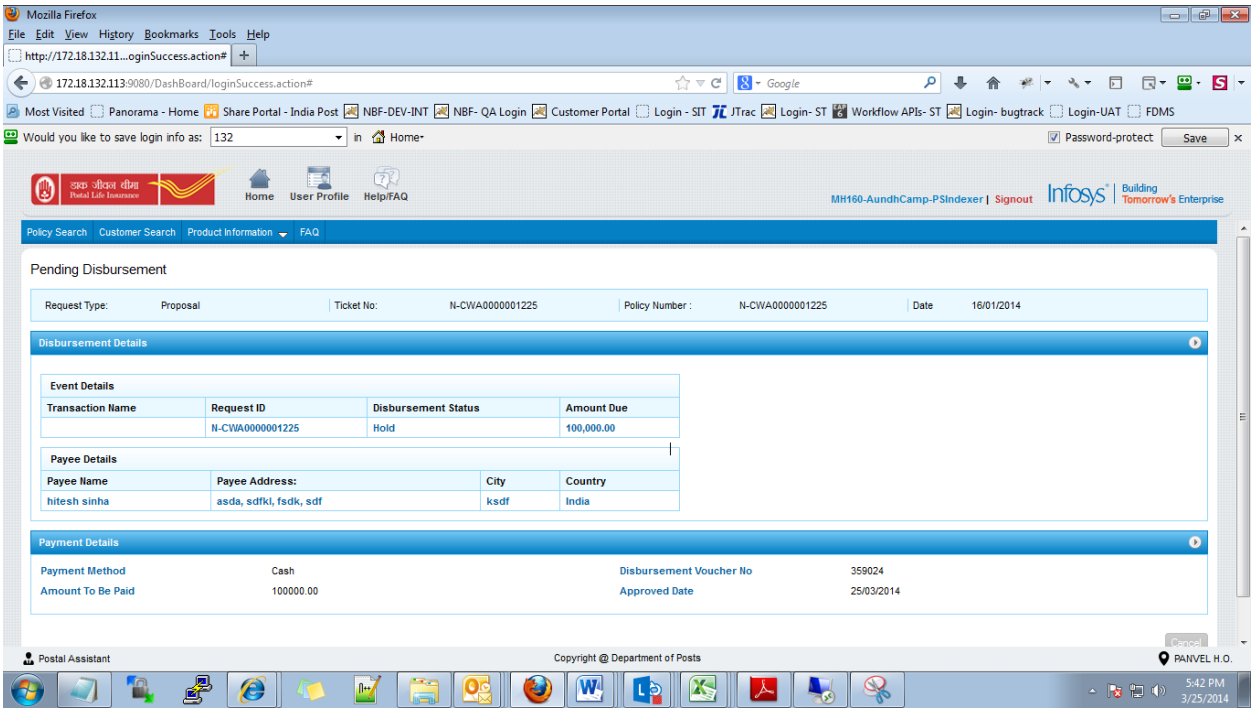
- Click on continue. Status of the proposal will change. No further changes will be allowed on that proposal.

2.1.3 Refund of premium through Pending disbursement Screen

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



- 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