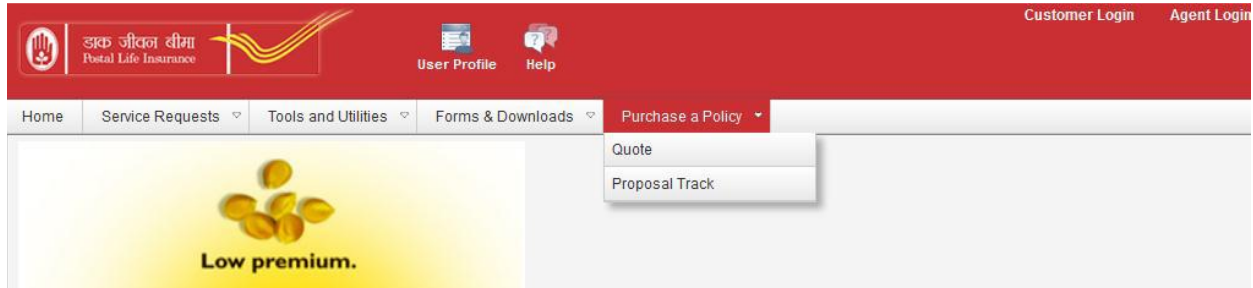


Process Document for Customer Portal Proposals

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

The screenshot shows the PLI Quote and Application screen. The top navigation bar is red with the PLI logo and text 'एक जीवन बीमा Postal Life Insurance'. There are links for 'User Profile' and 'Help'. On the right, there are links for 'Customer Login' and 'Agent Login'. Below the navigation bar, there are tabs for 'Home', 'Purchase a Policy', and 'Miscellaneous'. The 'Purchase a Policy' tab is selected, showing a dropdown menu with 'Quote' and 'Proposal Track'. The main content area features a large yellow banner with the text 'Low premium.' and an image of gold coins. Below the banner, there is a section titled 'Start a New Quote Here' with a note: 'Policy Issuance will take 10 days after submission and verification of all required documents.' The form contains several fields for personal and policy information, including Date of Birth, Gender, Product Type, Sum Assured, Occupation, Monthly Expenditure, Product Name, Premium Ceasing age, Monthly Income, and State. There is also a section for 'Information About You' with fields for Name, E-mail Address, Mobile Number, and Pin Code. At the bottom right, there is a CAPTCHA image with the text '0b3lc' and a 'Get Quote' button.

File Edit View History Bookmarks Tools Help

Spring M... maven pl... m2eclipse... Jsp and S... Jsp and S... Differenc... JNDI Java... Spring M... SQLISNU... Hibernate... Hibernate... Hibernate... CONSRV I... Quote Ap... Quote...

https://pli.indiapost.gov.in/CustomPortal/quoteaction.action

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सूक्ष्म जीवन बीमा
Postal Life Insurance

Help

Home Purchase a Policy Miscellaneous

Quote & Application Purchase a Policy > Quote

Your Quote

Suraksha(Whole Life Assurance)	Sum Assured	Premium Ceasing Age	Monthly Quote	Buy It
	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"

Proceed To Buy Recalculate

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

File Edit View History Bookmarks Tools Help

Spring M... maven pl... m2eclipse... Jsp and S... Jsp and S... Differenc... JNDI Java... Spring M... SQLISNU... Hibernate... Hibernate... Hibernate... CONSRV I... Quote Ap... Proposal G...

https://pli.indiapost.gov.in/CustomPortal/selectedQuoteAction.action#no-back-button

Most Visited Getting Started Suggested Sites Web Slice Gallery CSL Login CSL Home

सूक्ष्म जीवन बीमा
Postal Life Insurance

Help

Home Purchase a Policy Miscellaneous

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.

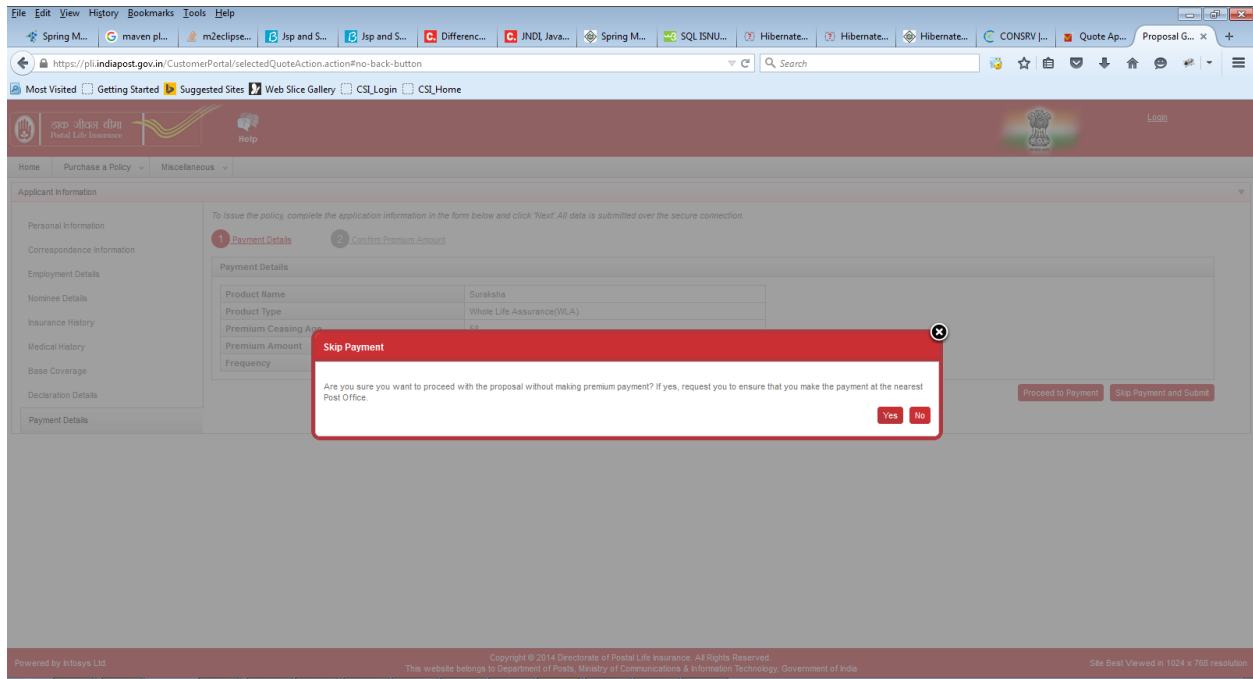
1 Payment Details 2 Confirm Premium Amount

Payment Details

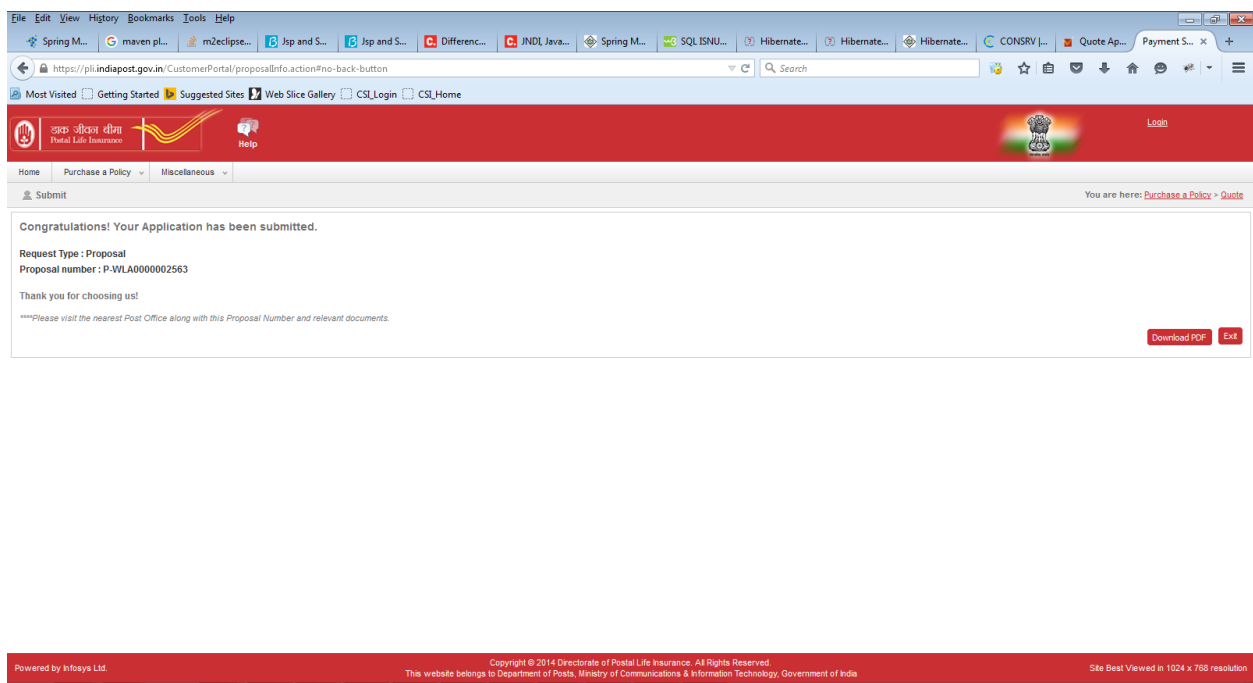
Product Name	Suraksha
Product Type	Whole Life Assurance(WLA)
Premium Ceasing Age	58
Premium Amount	3060.00
Frequency	Monthly

Proceed to Payment Skip Payment and Submit

After paying premium, submit the proposal.



Proposal number will generate:

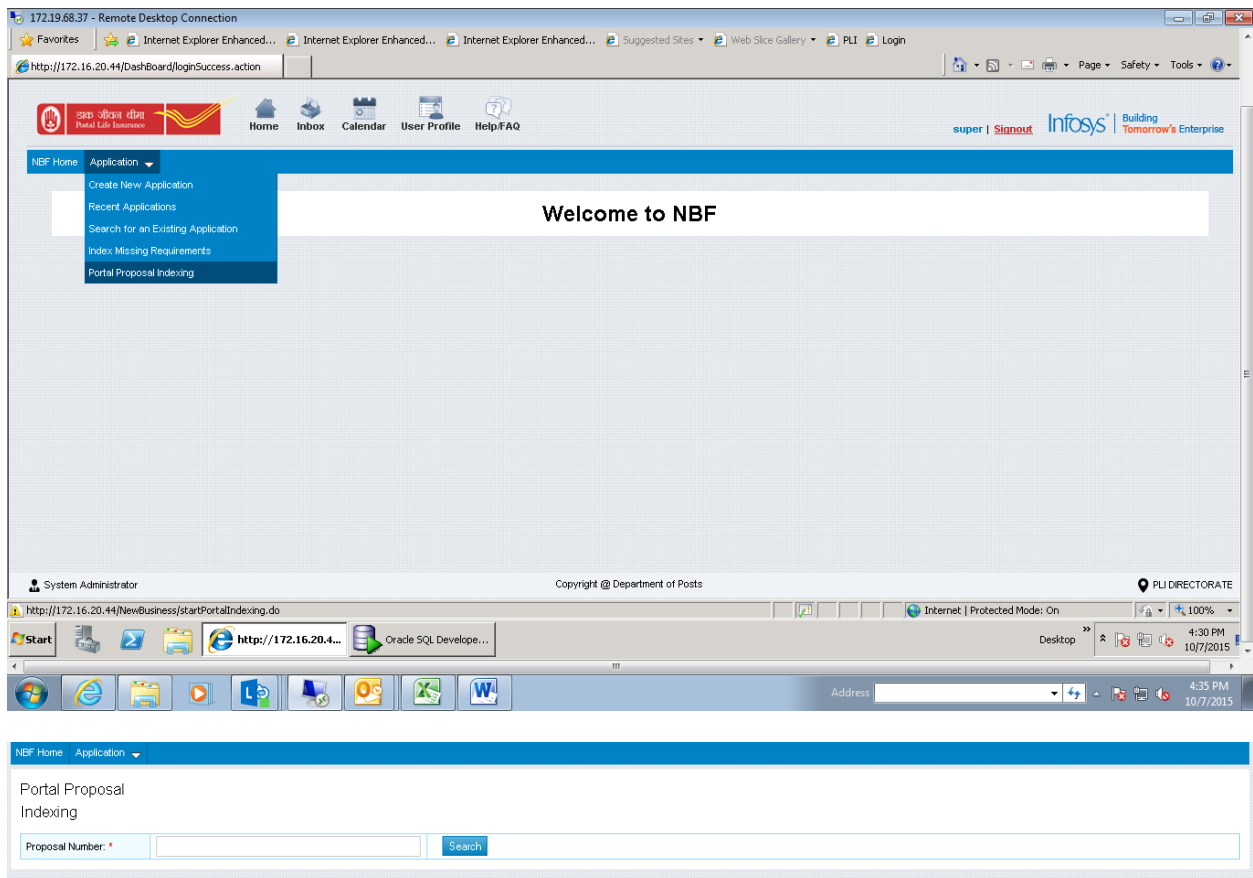


Step 4:

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:



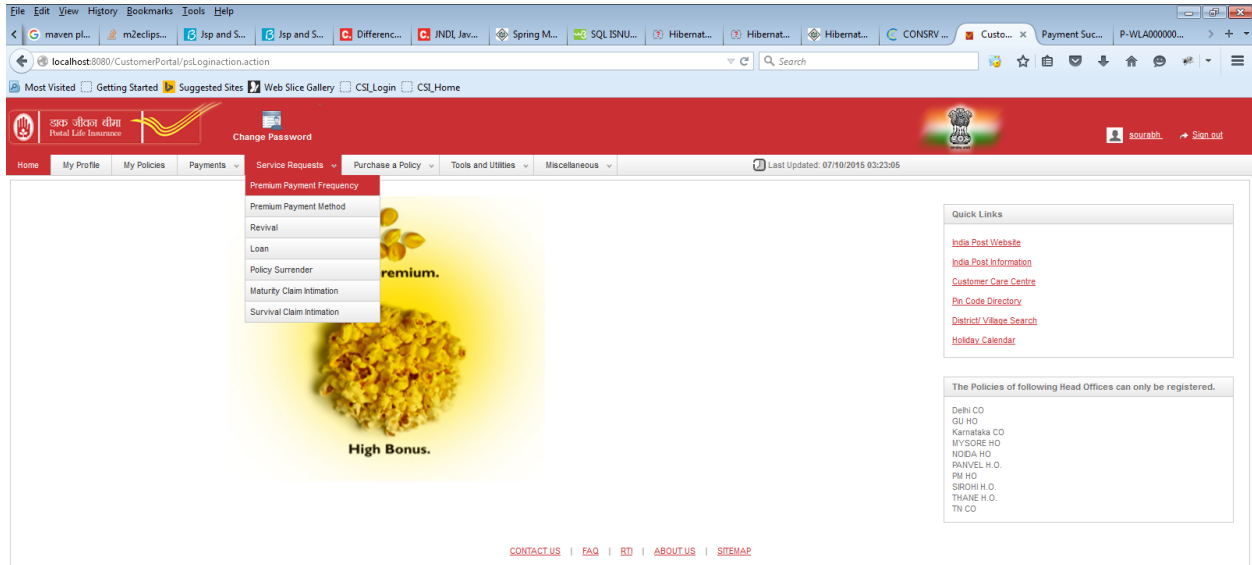
Once indexing is done, request will move to ECMS and will reflect in Mccamish.

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.



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Customer Portal > Service Requests > Premium Payment Frequency

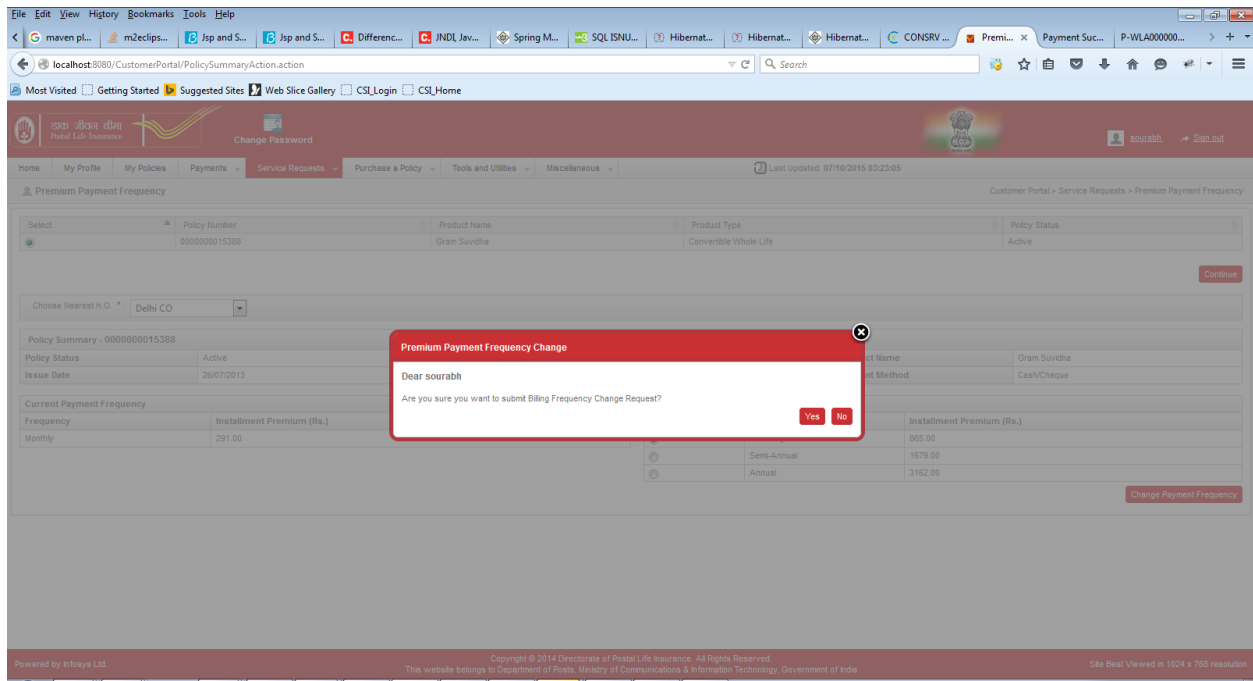
Select	Policy Number	Product Name	Product Type	Policy Status
<input type="radio"/>	0000000015388	Gram Sudha	Convertible Whole Life	Active

Choose Nearest H.O. :

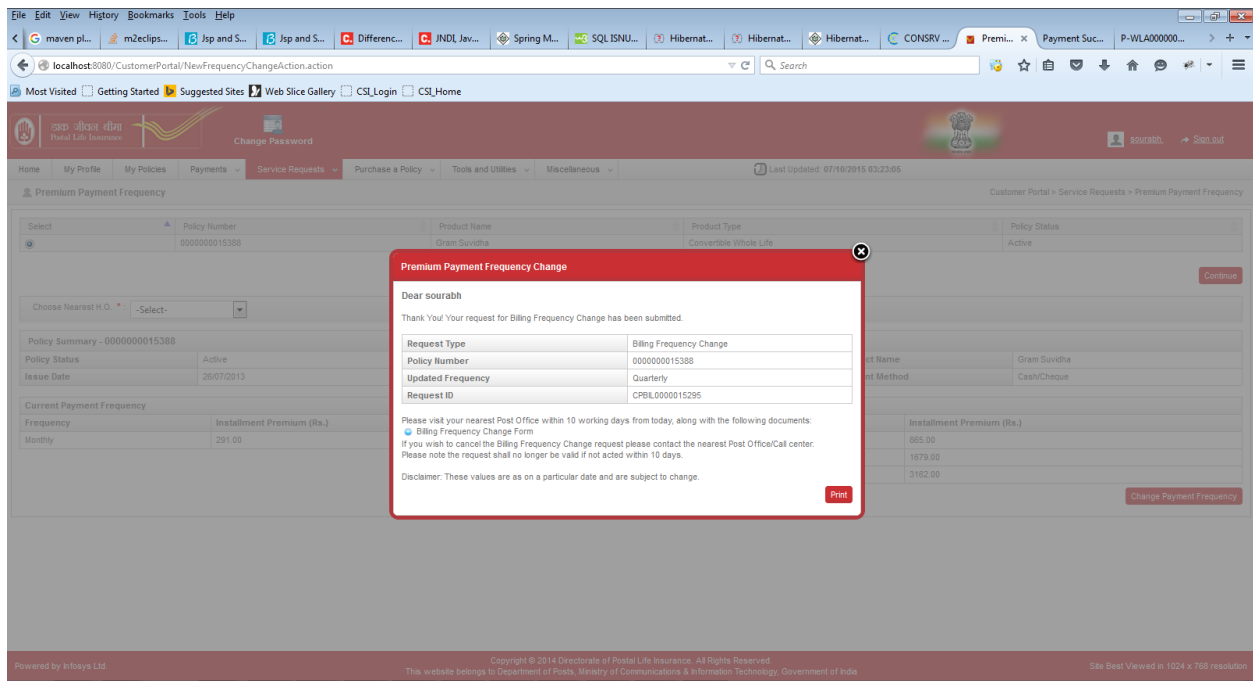
Policy Summary - 0000000015388					
Policy Status	Insured	Product Name	Current Method	Issue Date	Last Premium Paid Till
Active	sourabh bartakke	Gram Sudha	Cash/Cheque	26/07/2013	31/07/2013

Current Payment Frequency		Update Payment Frequency	
Frequency	Installment Premium (Rs.)	Select	Frequency
Monthly	291.00	<input type="radio"/>	Quarterly
		<input type="radio"/>	Semi-Annual
		<input type="radio"/>	Annual

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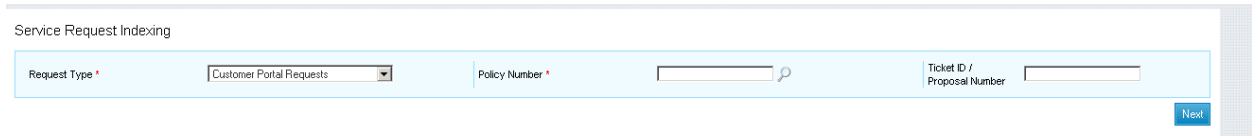
On submission of each request, a request ID is generated along with an Acknowledgement message.



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



Service Request Indexing

Request Type * Customer Portal Requests Policy Number * Ticket ID / Proposal Number Next

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.