



Operational Guide

for

PLI & RPLI Data Migration Verification Tool



DISCLAIMER:

The information provided in this OG is intended solely to assist users in understanding and effectively using the PLI/RPLI Migration tool. The answers and guidance provided are for reference purposes only and should not be considered as departmental rules, regulations, or official instructions.

For any clarification regarding departmental rules, regulations, procedures, or guidelines, users should refer to the relevant official manuals, volumes, orders, and departmental instructions. This OG should not be cited or relied upon as a substitute for such official references.

Document Control

Version	Date	Description	Document Index #	Author
1.0	13-08-2026	Initial Release	IMSOG001 v1.0 Dated 13-08-2026	CEPT

Purpose

This document provides step-by-step instructions for accessing the PLI/RPLI Data Migration Verification Tool, performing data verification activities, and extracting reports from the system.



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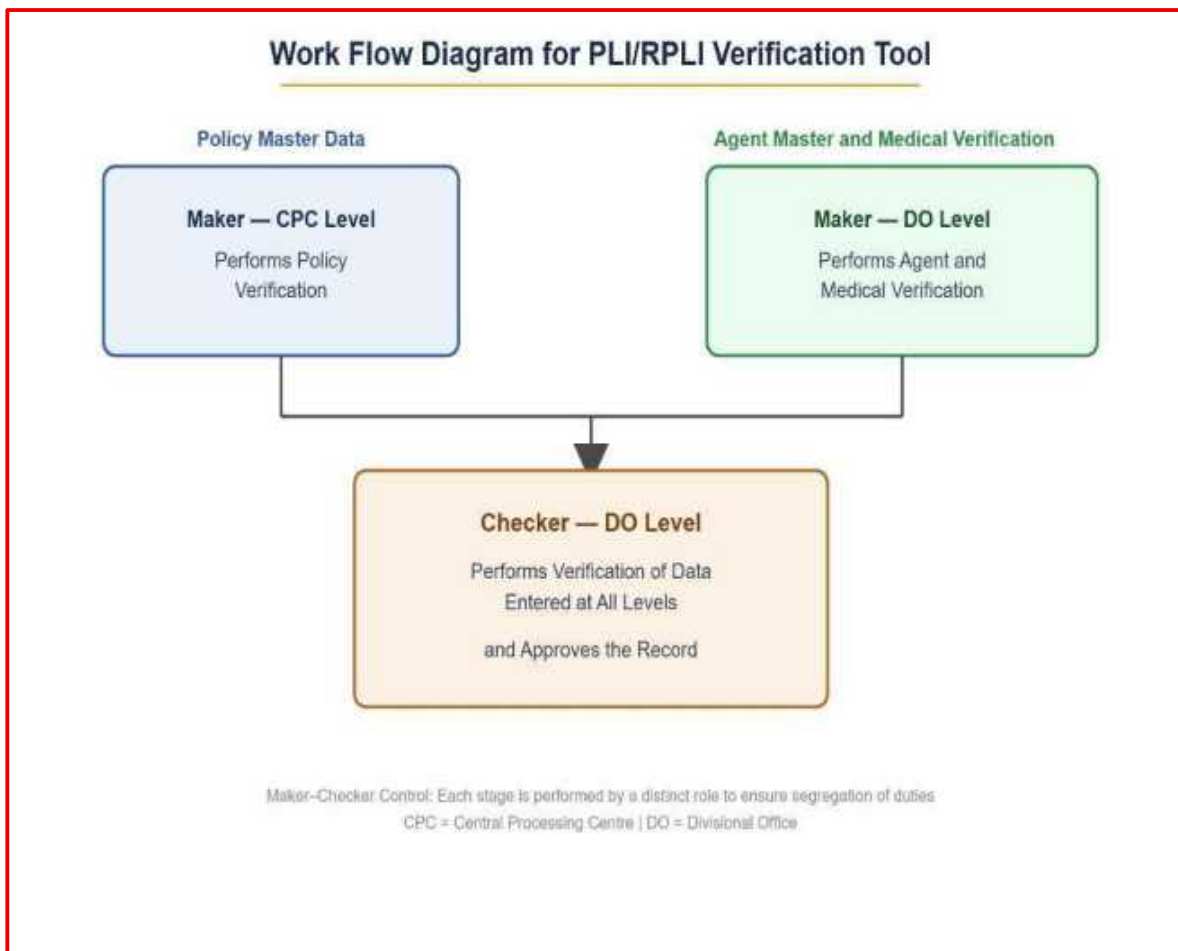
Abbreviations

Sl. No.	Abbreviation	Description
1	PLI	Postal Life Insurance
2	RPLI	Rural Postal Life Insurance
3	IMS	Insurance Management Solutions
4	CPC	Central Processing Centre
5	DO	Divisional Office
6	ME	Medical Examiner



Flow Diagram

The following diagram provides an overview of the end-to-end verification workflow, depicting the activities performed by each user role within the PLI/RPLI Data Migration Verification Tool.





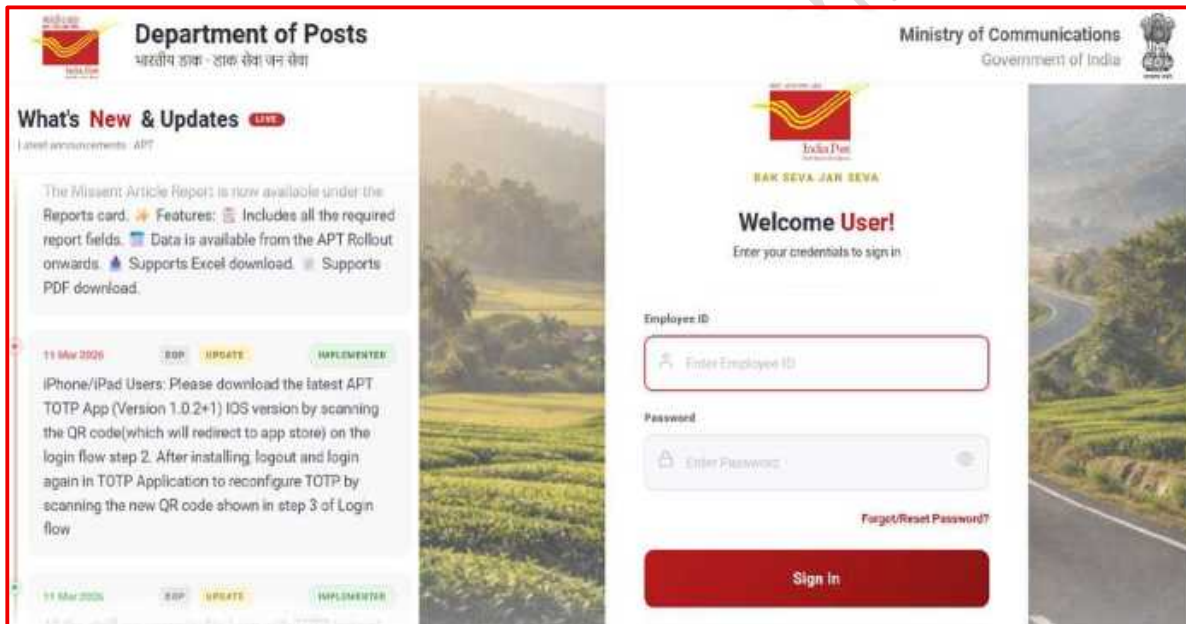
1. Login to PLI/RPLI Data Migration Verification Tool

Objective

To access the PLI/RPLI Data Migration Verification Tool application using authorized credentials.

Procedure

- Open the PLI/RPLI Data Migration Verification Tool URL (<https://app.indiapost.gov.in/employeeportal>) in a supported browser.
- Enter User ID.
- Enter Password.
- Click **Login**.
- Upon successful authentication, the Dashboard page is displayed.



Pic 1: Sign-in to <https://app.indiapost.gov.in/employeeportal>

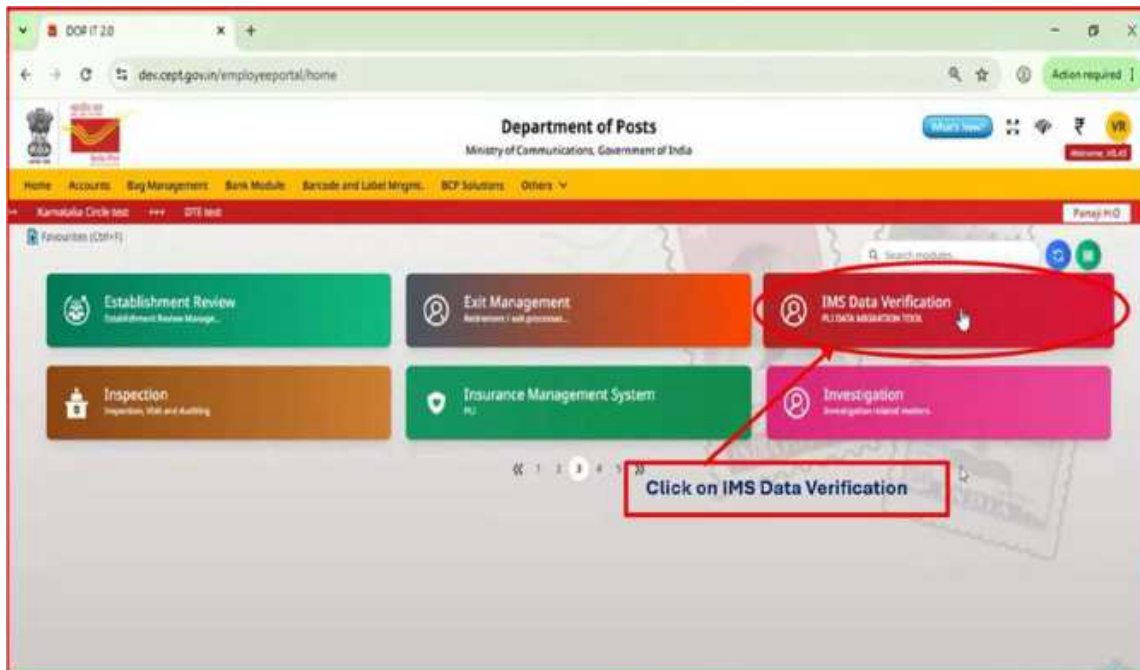
Note: Only authorized users can access the application based on assigned roles.

1.1 Roles:

	Maker	Checker
Policy Master	CPC	Divisional Head
Agent	DO Office Assistant	Divisional Head
ME	DO Office Assistant	Divisional Head



Users once logged in to the portal, click on **“IMS Data Verification card”**.



Pic 2: IMS Data Verification

2. Dashboard Navigation

Objective

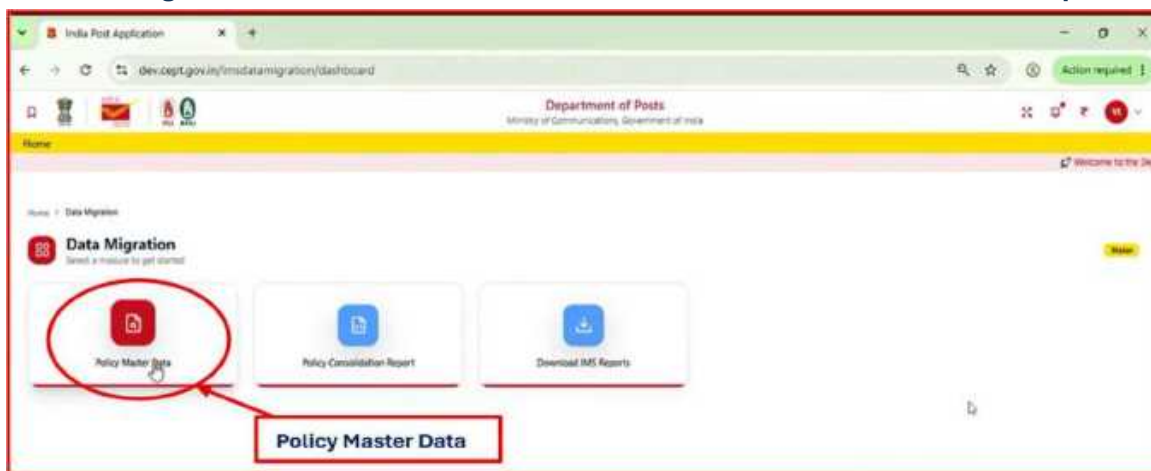
To understand the main navigation options available within the tool.

Procedure

1. Navigate through:
 - a. Policy Master Data
 - b. Agent/ME Master Verification
 - c. Reports
 - d. Approval Queue
2. Select the required menu option.



After clicking on IMS Data Verification card, users will see the sub-cards shown in **pic 3**.



Pic 3: Policy Master Data

This Picture depicts the available Sub-cards for **Maker** roles only

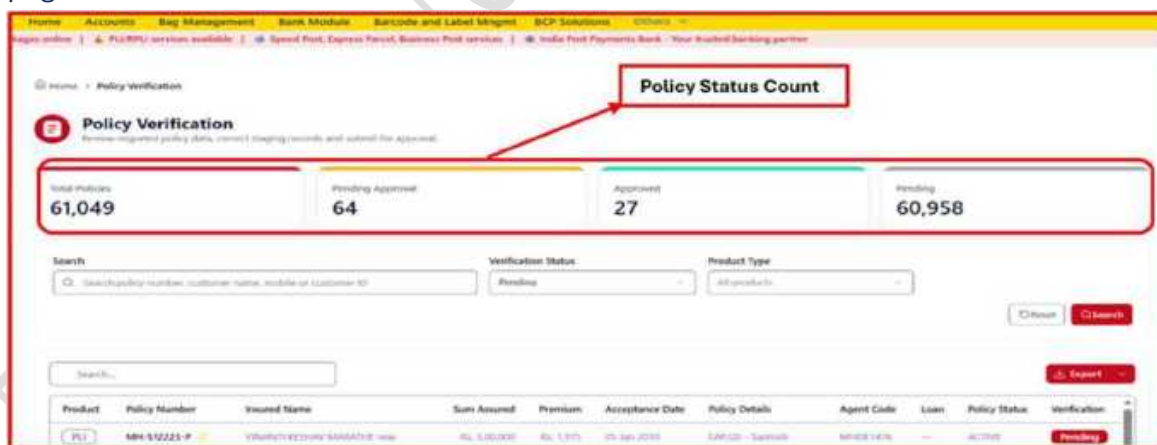
3. Policy Master Data Verification (CPC – Maker)

Objective

To review migrated policy records and record verification remarks.

Procedure

Upon selecting the Policy Master Data sub-card, Makers are redirected to Policy Verification page as shown below in **Pic 4**.



Pic 4: Policy Verification page

Note: The **Policy Verification** page shows:

- Total Policies
- Pending Approval
- Approved Policies
- Pending Policies



Makers can search the **required** data with the below options (Criteria):

1. Policy Number
2. Customer Name
3. Mobile Number
4. Customer ID

Search: Search policy number, customer name, mobile or customer ID

Verification Status: Pending

Product Type: All products

Search by Policy #, Cust Name, Mobile #, Cust ID

Reset Search

Pic 5: Search Options (Criteria)

After entering the search criteria, select the appropriate **Verification Status** such as Pending, Pending Approval, and Approved from the dropdown:

Search: Search policy number, customer name, mobile or customer ID

Verification Status: Pending

Product Type: All products

Reset Search

Pic 6: Select **Verification Status**

Once the **Verification Status** is selected, Makers must select the **Product Type** (PLI or RPLI) from the subsequent drop-down list and click on **Search**.

Search: Search policy number, customer name, mobile or customer ID

Verification Status: Pending

Product Type: All products

Reset Search

Pic 7: Select **Product Type** & Search

Makers can click the **Reset** button to clear the search criteria and initiate a new search.

Search: Search policy number, customer name, mobile or customer ID

Verification Status: Pending

Product Type: All products

Reset Search

Pic 8: Reset for New Search

Makers can use the **Search** option located above the data table to filter and shortlist policies displayed on the current page based on any criteria, such as **Insured Name**, **Policy Number**, **Agent Code**, or other relevant details.



Operation Guide on PLI/RPLI Data Migration Verification Tool



Search

Search policy number, customer name, mobile or customer ID

Verification Status: Pending

Product Type: All products

Reset Search

Search Policies on the current Page

Export

Product	Policy Number	Insured Name	Sum Assured	Premium	Acceptance Date	Policy Details	Agent Code	Loan	Policy Status	Verification
---------	---------------	--------------	-------------	---------	-----------------	----------------	------------	------	---------------	--------------

Pic 9: Search Policies on the current page

Makers can use the **export button** located on the top right side of the table to **export** the available data into a **CSV** file

Search

Export Data

Export

Product	Policy Number	Insured Name	Sum Assured	Premium	Acceptance Date	Policy Details	Agent Code	Loan	Policy Status	Verification
---------	---------------	--------------	-------------	---------	-----------------	----------------	------------	------	---------------	--------------

Pic 10: Export Available Data

Makers can use the drop-down menu in the bottom-left corner of the page to select the number of records displayed per page and the pagination controls in the bottom-right corner to navigate between the available pages of search results.

Rows per Page: 25

Pagination: 1 2

Product	Policy Number	Insured Name	Sum Assured	Premium	Acceptance Date	Policy Details	Agent Code	Loan	Policy Status	Verification
---------	---------------	--------------	-------------	---------	-----------------	----------------	------------	------	---------------	--------------

Pic 11: Rows per Page and Pagination

After the search results are displayed, Makers can click on the appropriate customer record to review and verify the customer details.

Search

Export

Policy Number	Insured Name	Sum Assured	Premium	Acceptance Date	Policy Details	Agent Code	Loan	Policy Status	Verification
MH-51853-P	DEEPAK V. GAWAS D	Rs. 1,00,000	Rs. 435	22 Nov 2010	SARV25 - Santosh	MH001	---	ACTIVE	Pending
MH-548706-P	SHARADH'S NAVE	Rs. 400,000	Rs. 1,300	12 Oct 2010	SARV22 - Santosh	MH001354	---	ACTIVE	Pending
MH-530433-P	PRATAP P. SAGRE	Rs. 2,00,000	Rs. 990	17 Mar 2010	SARV17 - Santosh	MH001	---	ACTIVE	Pending
MH-667701-P	SANDHYA S. JADHAV	Rs. 2,00,000	Rs. 710	01 Jan 2013	SARV23 - Santosh	MH001462	---	ACTIVE	Pending
MH-751384-P	SHREYA V. PRABHU	Rs. 5,00,000	Rs. 1,775	13 Nov 2014	SARV23 - Santosh	MH001331	---	ACTIVE	Pending
MH-612992-CS	PREETI C. BICHOUKAR	Rs. 5,00,000	Rs. 1,375	12 Jan 2012	SARV28 - Santosh	MH001462	---	ACTIVE	Pending
MH-737450-P	FARHA K. SYAKH	Rs. 15,00,000	Rs. 6,225	07 Mar 2014	SARV19 - Santosh	MH001331	---	ACTIVE	Pending
MH-140590-P	GOPINATH GHANASHYAM GAWDE	Rs. 90,000	Rs. 220	09 Feb 1999	SARV25 - Santosh	MH001	---	ACTIVE	Pending

Pic 12: Select appropriate customer record



Review Policy Details

DO Makers review and verify policy information, verify customer and nominee details, update policy-related data through collapsible sections, and mark the policy record as verified after validation.

Pic 13: Verify Policy

Makers select subsequent dropdowns to verify the Policy details, Address & Contact details, Nomination & Family details, Office & Agent details.

Pic 14: Policy Details

Pic 15: Address & Contact Details



Operation Guide on PLI/RPLI Data Migration Verification Tool



3. Nomination & Appointee Details MH-52643-US

Nominees 1 Record **Nominee Appointees** 0 Records

NOMINEE NAME:- MRS MAGDINA MRS MAGDINA

Pin appointees info for this policy.

Policy Number	Nominee ID	Salutation
MH-52643-US	2920	MR
First Name	Middle Name	Last Name
MRS MAGDINA	-	MRS MAGDINA
Gender	Date of Birth	Misc
MALE	01 Jan 1963	No
Relationship	Share Percentage	Address Line 1
SPOUSE	100%	DUMMY
Address Line 2	City	State
-	-	MH
Pin Code	Phone	
100001	-	

Pic 16: Nomination & Family Details

4. Spouse Details MH-YS-396759-CS

Spouse Details 1 Record

Spouse Policy Number: MH-YS-396759-CS

Spouse Name	Spouse Customer ID (if known)	Spouse Date of Birth
SONALI	27952182	12 Dec 1979
Nationality	Age Proof	Age Proof ID
INDIAN	OTHER_STANDARD	-
Age Proof Document Type		
Birth Certificate		

Pic 17: Spouse Details

5. Parent policy details MH-CP-NM-318363-P

Parent Policy Number	Parent Customer ID	Relation	Father Name
MH-129083-P	27396375	-	SANJAY SHIVAJI VOLVOIKAR
Mother Name			
-			

Pic 18: Parent Policy Details

6. Office & Agent Details MH-YS-396759-CS

Agent ID	Issued Office	CPC Name	Circle Name
MHDE135	Panaji H.O (24360002)	Panaji H.O (24360002)	Maharashtra Circle (24300001)

Pic 19: Office & Agent Details



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7. Financial Details MH-Y5-402086-CS

Loans Record

LOAN ACCOUNT NUMBER:- PLMH-Y5-602086-CS01

Loan Amount Rs. 34,000	Outstanding Principal Rs. 0	Interest Rate (%) 10
Sanction Date 05 Mar 2016	Disbursement Date 05 Mar 2016	Disbursement Mode FULL
Loan Status CLOSED	Closure Date 01 Oct 2024	Safe Custody No
Safe Custody Location Paraji H.O (24360002)	Loan Id 3912	

Pic 20: Financial Details

Once all the details are reviewed, Makers can click on **“Mark Verified”** button on the bottom right corner of the page.

Home Accounts Bag Management Bank Module Barcode and Label Mngmt BCP Solutions Others

MH-551853-P Marked

Product Type: PLI
Insurance Premium: Rs. 425
Insured Name: DESHA V GANAS H
Sum Insured: Rs. 1,00,000
Policy Term: 10 yrs
Policy Start: 22 Nov 2010
Policy End: 22 Nov 2020
Policy Status: Not routed yet
Policy Type: Not submitted

1. Policy Details
2. Address & Contact Details
3. Nomination & Family Details
4. Office & Agent Details

Mark Verified **Mark Verified**

Pic 21: Mark Verified

After completing the verification, the Makers should click **Mark Verified**. A pop-up window will be displayed, where the Maker can provide remarks and click **Mark Verified** to confirm the action.

Home Accounts Bag Management Bank Module Barcode and Label Mngmt BCP Solutions Others

Tool Status: Maker Updated By: Last Updated: 07 Aug 2024

1. Policy Details
2. Address & Contact Details
3. Nomination & Family Details
4. Office & Agent Details

Mark this record verified

Add a remark explaining your review before this goes to the checker.

Remarks:
Describe what you reviewed

Cancel **Mark Verified**

Update remarks **Mark Verified**

Pic 22: Update Remarks & Mark Verified



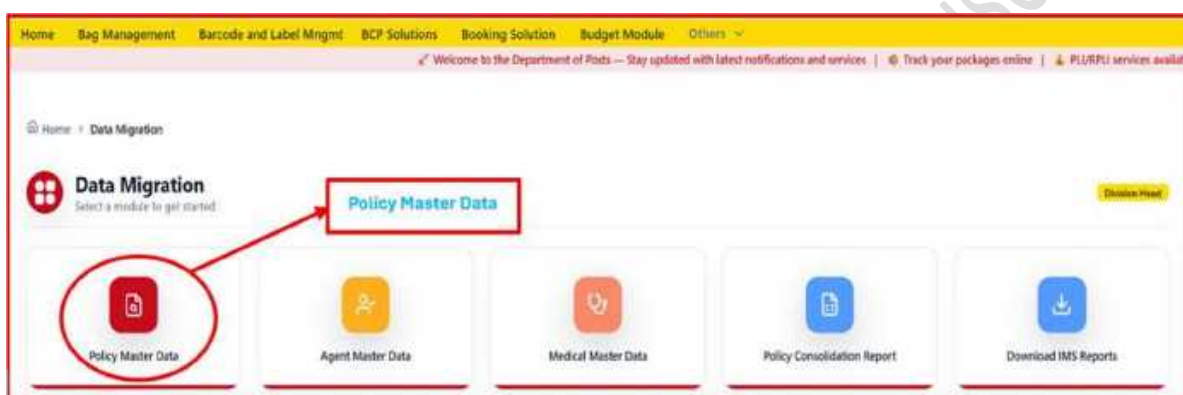
4. Policy Master Data Verification (Divisional Checker)

Objective

To review records submitted by Makers at CPC level and submit for approval or rejection.

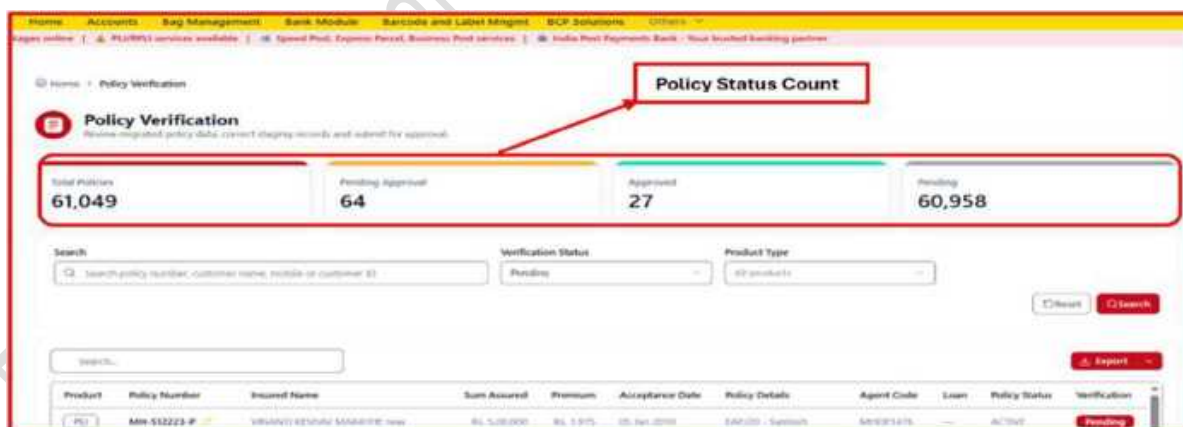
Procedure

Once the user (Divisional Checker) logs in to the portal, the landing page will show sub-cards (Policy Master Data, Agent Master Data, Medical Master Data, Policy Consolidation Report & Download IMS Reports) under **Data Migration** as shown in the below Pic 20.



Pic 23: Data Migration Page

DO Checker clicks on the **Policy Master Data** sub-card to review and approve record verified by CPC Maker.



Pic 24: Policy Verification Dashboard

The Policy Verification dashboard displays the total number of policies along with policy counts categorized by status: Pending Approval, Approved, and Pending.

The DO Checker can select any policy category to view the corresponding policy details and records under that category.



The DO Checker must follow the policy search process described in Section 3 to locate the required policy and review the information updated by the Maker

The DO Checker can select a particular policy record and verify the policy details.

Policy Number: MH-765490-P		Assigned Officer: Division Head		Submitted: 11 Aug 2025, 06:11 pm (td)	
Product Type	PLI	Insured Name	MANDAR SATYAWAN VAJRATKAR	Accidence Date	31 Mar 2015
Premium Amount	Rs. 1,275	Sum Assured	Rs. 5,00,000	Office	Panaji H.O (24860002)
				Premium Mode	MONTHLY
		Policy Term	30 yrs	Maturity Date	31 Mar 2045

Pic 25: Review Policy

The DO Checker clicks the relevant drop-down sections to review the Policy Details, Address & Contact Details, Nomination & Family Details, Office & Agent Details, and Maker's Remarks.

1. Policy Details

2. Address & Contact Details

3. Nomination & Family Details

4. Office & Agent Details

Maker's Remarks

Tallied

Pic 26: Review Policy, Address & Contact, Nomination & Family, Office & Agent, & Maker's Remarks

Once all the information is verified & found correct, DO Checker clicks on the **Approve** button on the bottom right corner of the page

1. Policy Details

2. Address & Contact Details

3. Nomination & Family Details

4. Office & Agent Details

Maker's Remarks

Tallied

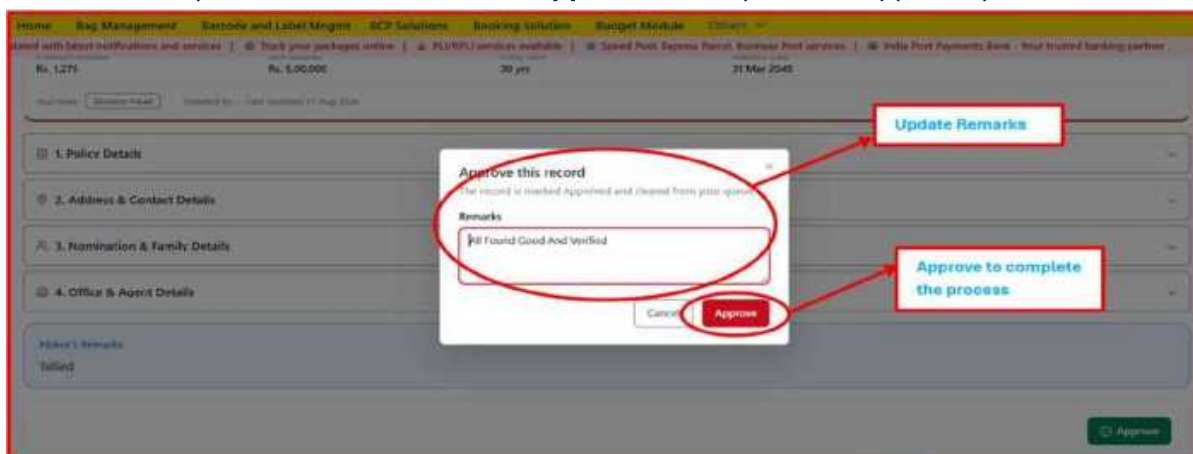
Approve Button

Approve

Pic 27: Approve Button



When the DO Checker clicks the **Approve** button, a confirmation pop-up appears. The DO Checker must provide remarks and click **Approve** to complete the approval process.



Pic 28: Update Remarks and Approve Record

Once the Record is Approved, the confirmation appears on the top right corner of the page **Policy Approved**.



Pic 29: Policy Approved

5. Agent Master Verification (Divisional Maker)

Objective

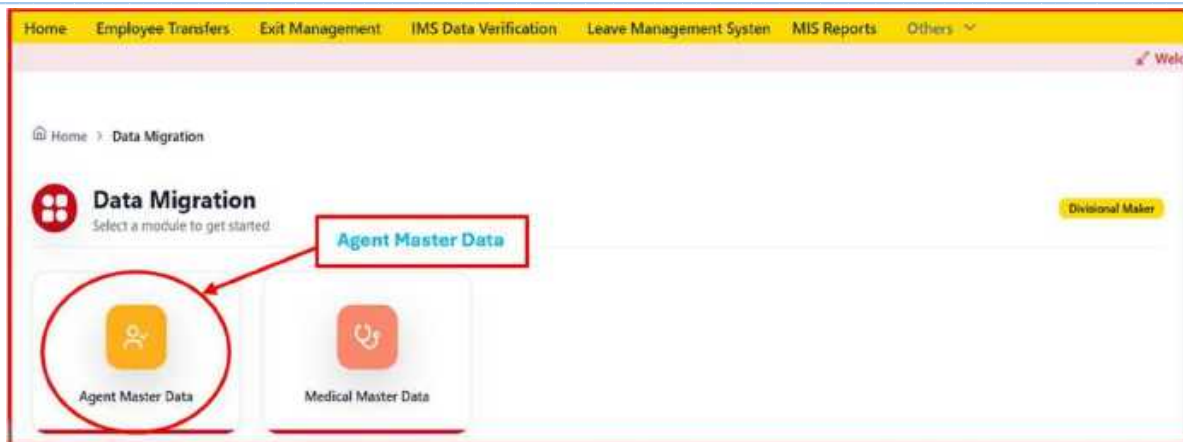
To verify and maintain Agent.

Procedure

Upon login, the DO Makers will land on the **Data Migration page**, where they can click on **Agent Master Data** as shown below in Pic 4.

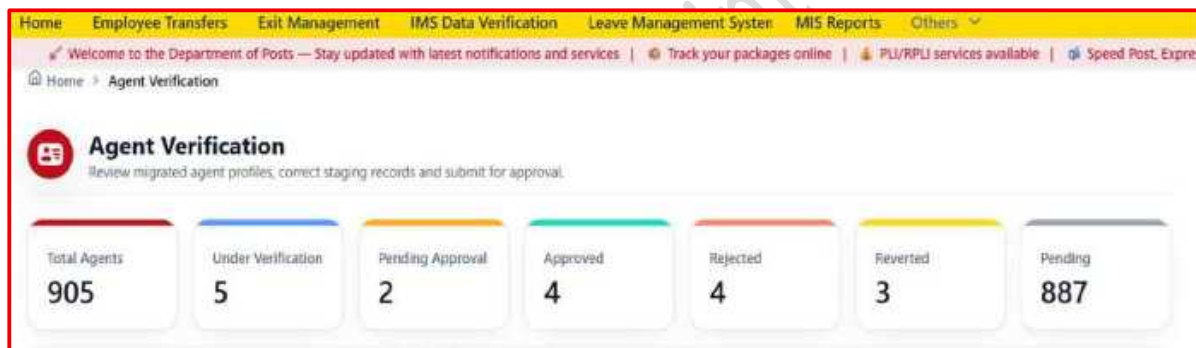


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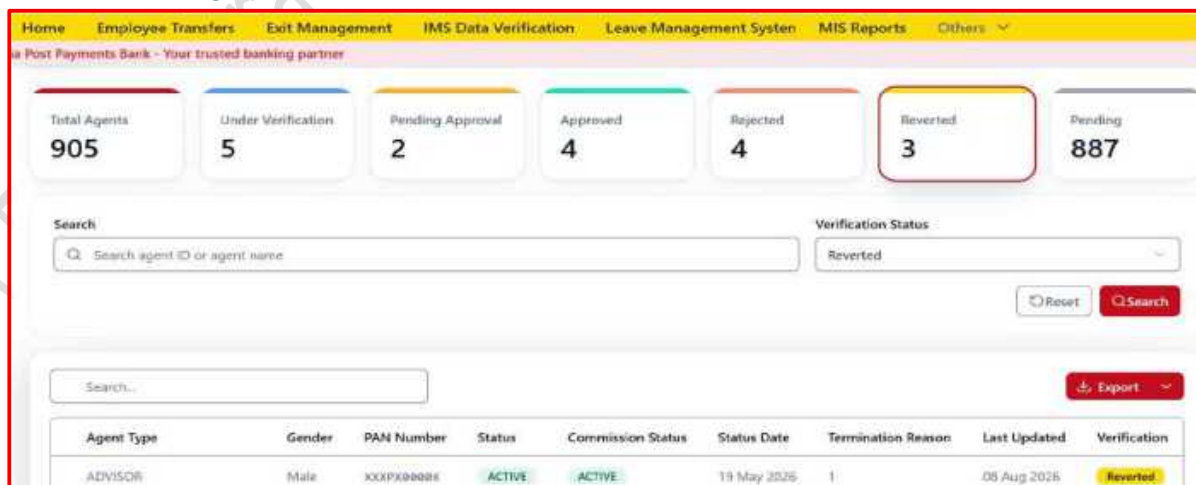
Pic 30: Data Migration Page

Upon clicking **Agent Master Data**, the DO Maker is redirected to the **Agent Verification Dashboard**, which provides an overview of the total number of agents and their status-wise distribution, including Under Verification, Pending Approval, Approved, Rejected, Reverted, and Pending.



Pic 31: Agent Verification Dashboard

By selecting a status card, DO Makers can view the detailed agent records corresponding to that status category.



Pic 32: Agent Status cards



DO Makers can search for a particular Agent Record by using the Search Option (**Search agent ID or agent name**) and filtering the Verification Status.

The screenshot shows a search interface with a search bar labeled 'Search agent ID or agent name' and a 'Verification Status' dropdown menu. The dropdown menu is open, showing options: Reverted, Pending, Under Verification, Pending Approval, Approved, Rejected, Reverted (highlighted), and Finalized. A red box highlights the search bar, and another red box highlights the 'Verification Status' dropdown. A red box also highlights the 'Search by Agent ID or Name' text.

Pic 33: Search Option and Verification Status

After specifying the search criteria and filtering by verification status, DO Makers can click **Search** to retrieve the relevant agent records.

The **Reset** button allows DO Makers to clear all selected filters and search parameters, enabling them to perform a new search.

The screenshot shows the search interface with a search bar, a 'Verification Status' dropdown menu set to 'Pending', and two buttons: 'Initiate Search' and 'Reset Search Criteria'. A red box highlights the 'Initiate Search' button, and another red box highlights the 'Reset Search Criteria' button. A red box also highlights the 'Reset' button.

Pic 34: Initiate Search and Reset Search Criteria

The second search option allows DO Makers to narrow down the results by entering the initial letters or characters of the Agent ID, Agent Name, Agent Type, or other fields available in the column headers.

The screenshot shows a table with search results. The table has columns: Agent ID, Agent Name, Agent Type, Gender, PAN Number, Status, Commission Status, Status Date, and Termination. The table contains three rows of data.

Agent ID	Agent Name	Agent Type	Gender	PAN Number	Status	Commission Status	Status Date	Termination
CSDH01326860	PRASAD KANTHALE	ADVISOR	Male	XXXXXX0000	ACTIVE	ACTIVE	19 May 2026	1
SDH01326833	PRASAD KANTHALE	ADVISOR	Male	XXXXXX0000	ACTIVE	ACTIVE	19 May 2026	1
DEEMPO1305610	PRASAD SANJAY TALEKAR	DEPARTMENTAL EMPLOYEE	Male	AVDPT67330	ACTIVE	ACTIVE	17 Feb 2026	1

Pic 35: Narrow down the search results

The **Export** option allows DO Makers to save the search results into a CSV file.

The screenshot shows the search results table with the 'Export' button highlighted. A red box highlights the 'Export to CSV file' button, and another red box highlights the 'Export' button.

Pic 36: Export to save the search results



DO Makers can use the drop-down menu in the bottom-left corner of the page to select the number of records displayed per page and the pagination controls in the bottom-right corner to navigate between the available pages of search results.



Pic 37: Rows per Page and Pagination

Once the search results are displayed, DO Makers can select the appropriate agent record to view, review, and verify the agent information.

Agent ID	Agent Name	Agent Type	Gender	PAN Number	Status	Commission Status	Status Date
MOS01326896	SANTOSH KULKARNI	ADVISOR	Male	XXXXXX0000X	ACTIVE	ACTIVE	19 May 2026
CSDH01326887	VIDYA NEGI	ADVISOR	Male	XXXXXX0000X	ACTIVE	ACTIVE	19 May 2026
SDH01326883	VIDYA NEGI	ADVISOR	Male	XXXXXX0000X	ACTIVE	ACTIVE	19 May 2026

Pic 38: Select appropriate agent record

DO Makers review and verify the agent details to confirm that they have selected the appropriate agent record for processing.

Pic 39: Verify Agent

DO Makers select the subsequent dropdowns to verify and edit the Policy details, Address & Contact details, License & Bank details, Nomination details.

Pic 40: Verify & Edit Agent Details



DO Makers can click on Edit option and edit the information available. Once the information is updated, they can click on Save Changes to save the changes or Cancel Changes to discard the changes



Pic 41: Edit & Save Agent Details

DO Makers can click on the Address & Contact details to Add a new address, Edit current address for the Agent.



Pic 42: Add New Address / Edit Current Address

If the DO Makers are editing the current address, they have all the below options available to record the changes

- Primary Address – yes or no
- Same as Permanent – yes or no
- Effective from
- Effective till



Pincode
111111

Primary

Effective From
01-01-1900

Effective To
dd-mm-yyyy

Same as Permanent

Same as Permanent Yes/No

Primary Yes/No

Pic 43: Options under Edit Address

After completing all the required fields, DO Makers should click the **Save** button to save the entered details.

Pic 44: Save the Edited Address

DO Makers can add new address by clicking on the Add button and enter all the required fields

New Address

Address Type
Select an option

Address Line 1

Address Line 2

City

State

Country

Pincode

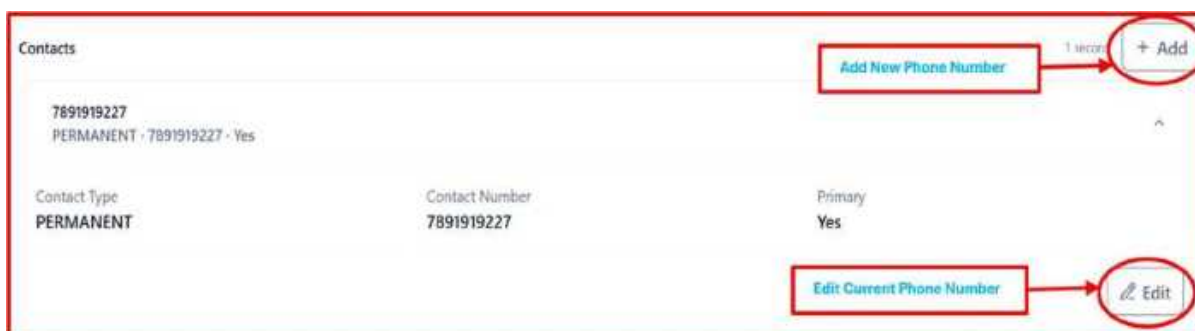
Pic 45: Add New Address

Once all the fields are entered, DO Makers click on **Create** button to save the entries or click cancel to discard the entries.

Pic 46: Save / Cancel New Address

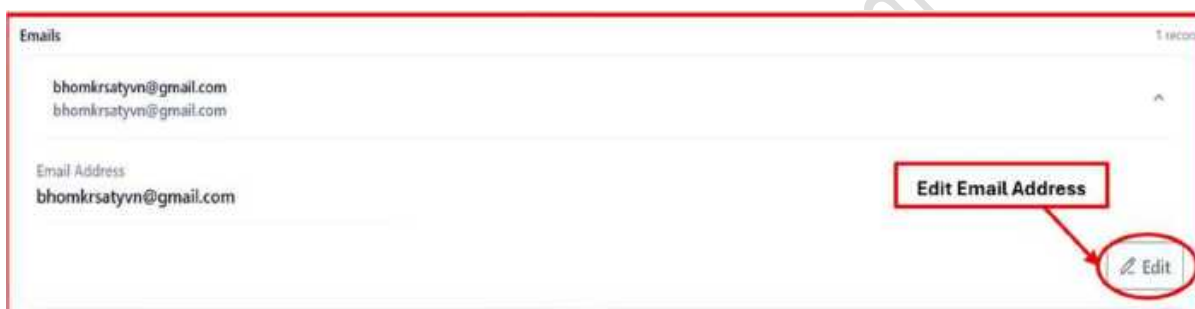


Under the Contacts section, DO Makers can use the Add button to add a new phone number to the available contact records or the Edit button to update an existing phone number.



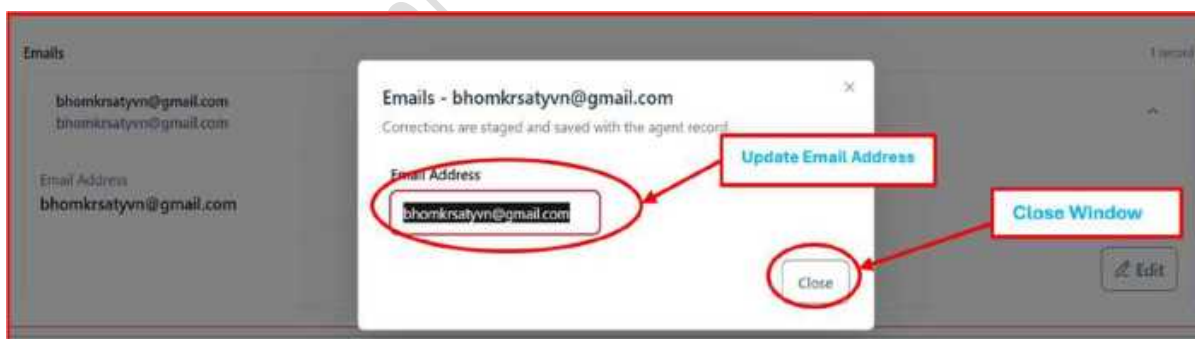
Pic 47: Add/Edit Phone number

DO Makers scroll down to **Edit** the current email address.



Pic 48: Edit Email Address

When the **Edit** button is clicked, a pop-up window opens, allowing DO Makers to update the email address. Once the changes are completed, they can click **Close** to exit the window.



Pic 49: Update Email Address

The **License & Bank Details** section is the next component that DO Makers must review and verify as part of the agent verification process.



3. License & Bank Details SDH01325571

Licenses Record + Add

License Number SDH01325571

Bank Details Record + Add

Bank Name POSB

Pic 50: Verify License & Bank Details

DO Makers can proceed to the Nomination Details section to review and verify the nominee information associated with the agent record.

4. Nomination Details

Nominations 0 records

No nominations for this agent.

Pic 51: Verify License & Bank Details

Once all the information is verified and updated, DO Makers click on **Submit for Approval** button to forward the record for approval

Home Employee Transfers Exit Management IMS Data Verification Leave Management System MIS Reports Others

India Post, Express Parcel, Business Post services | India Post Payments Bank - Your trusted banking partner

Name: NARENDRA PILYEKAR Your roles: Divisional Maker Updated By: AJJ NIKHARE Last Updated: 06 Aug 2026

1. Agent Details

2. Address & Contact Details

3. License & Bank Details

4. Nomination Details

Submit for Approval

Pic 52: Submit for Approval

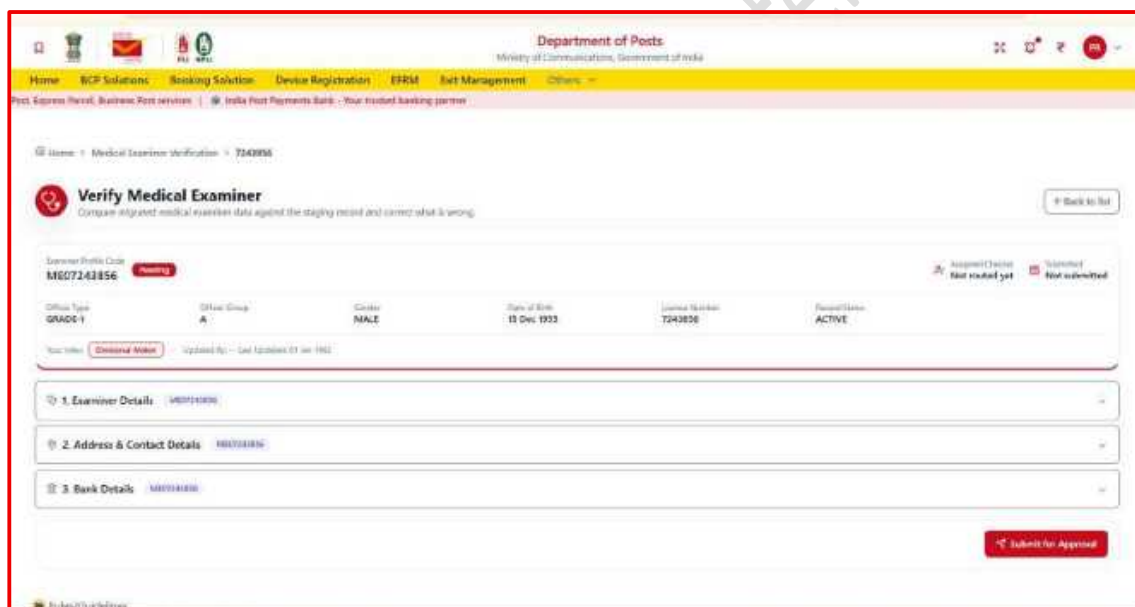
6. Medical Master Verification (Divisional Maker)

To start the Medical Examiner verification process, the DO Maker selects the Medical Master Data card from the Data Migration page.



Pic 53: Data Migration page & Medical Master Data

Upon clicking the **Medical Master Data**, DO Maker will be redirected to **Medical Examiner Verification** page



Pic 54: Medical Examiner Verification Search

The Medical Examiner Verification page has the same layout and functionality as the Agent Verification page, including Search, Reset, Export, Pagination, and Rows per Page options. Refer to the Agent Verification process for instructions on using these features

Once the desired results are retrieved from the search, DO Maker selects appropriate record and verify the Medical Examiner information to ensure that the correct Medical Examiner record has been selected for verification.



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Home Employee Transfers Exit Management IMS Data Verification Leave Management System MIS Reports Others

Welcome to the Department of Posts — Stay updated with latest notifications and services | Track your packages online | PLI/RPLI services available | Speed

Home > Medical Examiner Verification > 72696817

Verify Medical Examiner
Compare migrated medical examiner data against the staging record and correct what is wrong.

Examiner Profile Code: DC726968 Pending

Assigned Checker: Not routed yet Submitted: Not submitted

Officer Type: GRADE-1 Officer Group: A Gender: Male Date of Birth: 01 Jul 1980 License Number: 72696817 Record Status: ACTIVE

Name: A - Your roles: Divisional Maker - Updated By: 11111111 - Last Updated: 01 Jan 2018

Pic 55: Verify Medical Examiner

Once the information has been verified, the DO Maker can expand the relevant drop-down section to review, verify, and update the Medical Examiner details.

1. Examiner Details

Examiner Profile Code: DC726968 Examiner ID: 72696817 Medical Examiner Subtype: 1

First Name: A Middle Name: S Last Name: SINHA

Pic 56: Verify Examiner details

DO Makers can click the Edit option to modify the existing Medical Examiner information as needed.

Home Employee Transfers Exit Management IMS Data Verification Leave Management System MIS Reports Others

of Posts — Stay updated with latest notifications and services | Track your packages online | PLI/RPLI services available | Speed Post, Express Parcel, Business Post services

ACTIVE 15/02/2016 01/01/2016

Termination Date: Select date

Edit to make changes

Edit

Pic 57: Edit Examiner details

After making the required changes, DO Makers should click Save Changes to apply and save the updates. To abandon the changes and revert to the previously saved information, they can click Cancel Changes.



Operation Guide on PLI/RPLI Data Migration Verification Tool



Home Employee Transfers Exit Management IMS Data Verification Leave Management System MIS Reports Others

Welcome to the Department of Post

ACTIVE 15/02/2016 01/01/2016

Termination Date
Select date

Cancel Changes Save Changes

Pic 58: Save or Cancel Changes

DO Makers can click on the Address & Contact details to Add a new address, Edit current address for the Examiner.

2. Address & Contact Details

Addresses

Address Type	Address Line 1	Address Line 2	City	State	Country	Effective From	In Action
COMMUNICATION	GANDHI NAGAR 3RD LANE	BERHAMPUR	0	Ganjam	INDIA	01 Jun 1800	Yes

Contacts

Contact Type: MOBILE

Pic 59: Add New Address / Edit Current Address

Once all the fields are entered, DO Makers click on **Create** button to save the entries or click cancel to discard the entries.

Cancel Create

Pic 60: Save / Cancel New Address

The **License & Bank Details** section is the next component that DO Makers must review and verify as part of the agent verification process.



Operation Guide on PLI/RPLI Data Migration Verification Tool



Pic 61: Verify Bank Details

Once all the information is verified and updated, DO Makers click on **Submit for Approval** button to forward the record for approval

Pic 62: Submit for Approval

When the DO Maker clicks **Submit for Approval**, a pop-up window appears prompting the user to enter remarks. After providing the remarks, the DO Maker can click Submit to forward the record for approval.

Pic 63: Update Remarks & Submit



7. Agent Verification (Divisional Checker)

Objective

To approve or reject Maker updates.

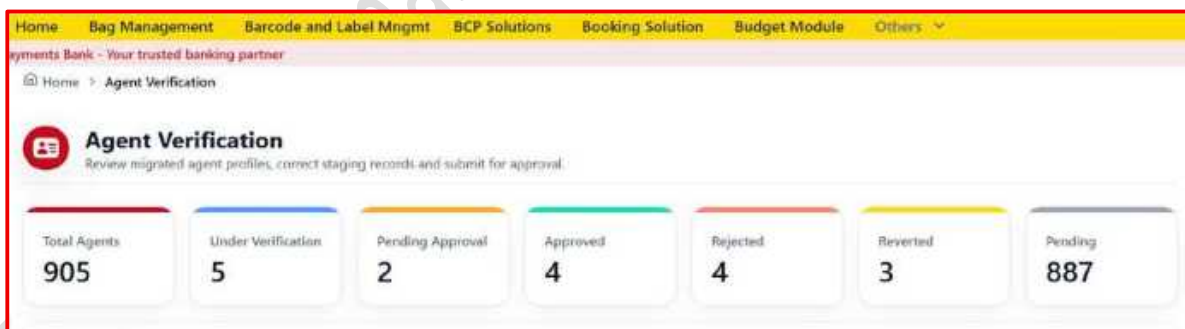
Once the user (Divisional Checker) logs in to the portal, the landing page will show sub-cards (Policy Master Data, Agent Master Data, Medical Master Data, Policy Consolidation Report & Download IMS Reports) under **Data Migration** as shown in the below Pic.



Pic 64: Data Migration Page and Agent Master Data

DO Checker clicks on the **Agent Master Data** card to review the **Agent Verification records**.

When the DO Checker selects the **Agent Master Data** card, the **Agent Verification Dashboard** is displayed, providing an overview of the total agent count and status-wise distribution of agents across different verification stages.



Pic 65: Agent Verification Dashboard

DO Checkers can use the status cards on the dashboard to access and review agent records categorized under the respective status.



Operation Guide on PLI/RPLI Data Migration Verification Tool



Pic 66: Agent status cards

DO Checkers can filter agent records by entering search criteria and selecting the appropriate verification status from the Verification Status drop-down list.

Pic 67: Agent Search

After entering the search criteria and selecting the appropriate verification status, DO Checkers should click the **Search** button below the Verification Status drop-down list to initiate the search. To perform a new search, they can click the **Reset** button to clear the existing search criteria and filters.

Pic 68: Search and Reset

The second search option allows DO Checkers to narrow down the results by entering the initial letters or characters of the Agent ID, Agent Name, Agent Type, or other fields available in the column headers.



Operation Guide on PLI/RPLI Data Migration Verification Tool



Agent ID	Agent Name	Agent Type	Gender	PAN Number	Status	Commission Status	Status Date
DEEMP01316262	SANJAY SADASHIV DHURKAR	DEPARTMENTAL_EMPLOYEE	Male	BISP03517L	ACTIVE	ACTIVE	01 Apr 2026

Pic 69: Narrow down the search results

The **Export** option allows DO Checkers to save the search results into a CSV file.

Agent ID	Agent Name	Agent Type	Gender	PAN Number	Status	Commission Status	Status Date
----------	------------	------------	--------	------------	--------	-------------------	-------------

Pic 70: Export to save the search results

Once the search results are displayed, DO Checkers can select the appropriate agent record to Review, Verify, and Approve the agent information.

Agent ID	Agent Name	Agent Type	Gender	PAN Number	Status	Commission Status	Status Date
MDS01326896	SANTOSH KULKARNI	ADVISOR	Male	XXXXXX000X	ACTIVE	ACTIVE	19 May 2026
CSDH01326887	VIDYA NEGI	ADVISOR	Male	XXXXXX000X	ACTIVE	ACTIVE	19 May 2026
SDH01326883	VIDYA NEGI	ADVISOR	Male	XXXXXX000X	ACTIVE	ACTIVE	19 May 2026

Pic 71: Select appropriate agent record

DO Makers review and verify the agent details to confirm that they have selected the appropriate agent record for processing.

Verify Agent
Compare migrated agent data against the staging record.

Agent Code: CSDH01326887 **Pending**

Assigned Checker: Not routed yet
Submitted: Not submitted

Agent Type: ADVISOR
Gender: MALE
Date of Birth: 20 Mar 1990
PAN Number: XXXXX0000X
Record Status: ACTIVE

Office: 24530001

Name: VIDYA NEGI - Your role: Division Head - Updated by: AU_NICHARE - Last Updated: 06 Aug 2026

Pic 72: Verify Agent

Upon verifying the agent data, DO Checkers go through the different dropdowns to verify the Agent details, Address & Contact details, License & Bank details, Nomination details.



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Welcome to the Department of Posts — Stay updated with latest notifications and services | Track your packages online | PLI/RPLI services available | Speed Post, Express Parcel

Office: 24530001

Name: VIDYA NEGI Your role: Division Head Updated By: PU, NIDHARE - Last Updated: 06 Aug 2025

1. Agent Details

2. Address & Contact Details

3. License & Bank Details

4. Nomination Details

Pic 73: Parameters to complete Agent Verification

1. Agent Details

Your role does not permit editing staging data.

Agent Code: CSDH01326887 Agent Type: ADVISOR Employee ID:

Office ID: 24530001 Circle ID: Division ID:

Title: First Name: Middle Name:

Pic 74: Agent Details

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2. Address & Contact Details

Addresses: 1 record

PERMANENT
IP PONDA SUB DIVISION, PONDA State Required 111111

Address Line 2: Address Line 3: Village:

Taluka: District: Country: India

Pic 75: Address & Contact Details

3. License & Bank Details

Licenses: 0 records

No licenses for this agent.

Bank Details: 0 records

No bank details for this agent.

Pic 76: License & Bank Details



4. Nomination Details	
Nominations	0 records

Pic 77: Nomination Details

A yellow flag is displayed in each dropdown for Checkers, showing the number of changes made by the Maker.

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Agent Type: DEPARTMENTAL_EMPLOYEE Gender: MALE Date of Birth: 08 Jun 1990 ID Number: BFWPP7066H Record Status: ACTIVE

Office: 24530001

Name: PRATHAMESH KAILAS PATIL Your role: Checker Head Updated By: ALL/NO/NO Last Updated: 03 Aug 2020

1. Agent Details 2. Address & Contact Details 3. License & Bank Details 4. Nomination Details

Changes done by Maker 1 change

Maker's Remark: Last name updated

Revert Reject Approve

Pic 78: Changes made by Maker

Upon clicking the row, the DO Checker will be able to view the exact changes made by the Maker, along with the original entry as it existed before the modifications were made.

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Selected binding partner

Title Middle Name

Last Name Gender Date of Birth

PRTEL, PRATHAMESH KAILAS New name MALE 08/06/1990

Changes made & Original Entry 1 change

Pic 79: Changes made & Original Entry



After verifying all the details and reviewing the DO Maker's remarks, the DO Checker can take the appropriate action by selecting Approve, Reject, or Revert for the record.

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2. Address & Contact Details

3. License & Bank Details

4. Nomination Details

Maker's Remarks
Last name updated

Revert Reject Approve

Pic 80: Approve, Reject or Revert

8. Medical Examiner Verification (Divisional Checker)

The DO Checker initiates the Medical Examiner verification process by selecting the Medical Master Data card from the Data Migration page.

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updated with latest notifications and services: | Track your packages online: | PLI/RPLI services available: | Speed Post, Express Parcel, Business Post services: | India Post Pay

Home Data Migration

Data Migration
Select a module to get started

Medical Master Data

Policy Master Data Agent Master Data Medical Master Data Policy Consolidation Report Download IMS Reports

Division Head

Pic 81: Data Migration Page & Medical Master Data

Upon clicking the **Medical Master Data**, DO Checker will be redirected to **Medical Examiner Verification** page



Operation Guide on PLI/RPLI Data Migration Verification Tool



Home > Medical Examiner Verification

Medical Examiner Verification

Review migrated medical examiner master data, correct staging records and submit for approval.

Search: Verification Status:

Examiner Profile Code	Examiner Name	License Number	Officer Type	Officer Group	Gender	Contact Number	Status	Status Date
-----------------------	---------------	----------------	--------------	---------------	--------	----------------	--------	-------------

Pic 82: Medical Examiner Search

The Medical Examiner Verification page has the same layout and functionality as the Agent Verification page, including Search, Reset, Export, Pagination, and Rows per Page options. Refer to the Agent Verification process for instructions on using these features

Once the desired results are retrieved from the search, DO Checker selects appropriate record and verify the Medical Examiner information to ensure that the correct Medical Examiner record has been selected for verification.

Department of Posts
Ministry of Communications, Government of India

Home > Medical Examiner Verification > 2150535030

Verify Medical Examiner

Compare migrated medical examiner data against the staging record and correct what is wrong.

Examiner Profile Code: **ME2150535030**

Officer Type: **GRADUATE** Officer Group: **C** Gender: **MALE** Date of Birth: **27/04/1981** License Number: **2150512030** Record Status: **ACTIVE**

1. Examiner Details: **ME2150535030**

2. Address & Contact Details: **ME2150535030**

3. Bank Details: **ME2150535030**

Pic 83: Medical Examiner Details



Upon clicking the rows, DO Checker can verify Examiner details, Address & Contact details, and Bank details as seen in below Pic 52.

1. Examiner Details

Your role does not permit editing staging data.

Examiner Profile Code	Examiner ID	Medical Examiner Subtype
DC000379	379	
First Name	Middle Name	Last Name
DR. R.K.KUSHWAHA		
Gender	Date of Birth	License Number
MALE	15/08/1947	379

Pic 84: Medical Examiner Details

2. Address & Contact Details

Addresses: 1 record

COMMUNICATION	0	Uttar Pradesh
---------------	---	---------------

Address Line 2	Address Line 3	Village
-	-	0
Taluka	District	Country
-	Uttar Pradesh	INDIA

Pic 85: Address & Contact Details

3. Bank Details

Bank Accounts	0 records
---------------	-----------

No bank accounts for this medical examiner.

Pic 86: Bank Details



After reviewing and verifying all the details, along with any comments entered by the DO Maker, the DO Checker can take the appropriate action by selecting Approve, Reject, or Revert for the record.

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India Post Payments Bank - Your trusted banking partner.

Examiner Profile Code: **DC278597** Pending Approval

Assigned Checker: **Division Head** | Submitted: **08 Aug 2026, 04:24 am (5d)**

Officer Type: **GRADE-1** | Officer Group: **A** | Gender: **Male** | Date of Birth: **01 Jan 1960** | License Number: **27859707** | Record Status: **ACTIVE**

Name: - | Your role: **Division Head** | Updated By: T1111111 | Last Updated: 08 Aug 2026

1. Examiner Details

2. Address & Contact Details

3. Bank Details

Pic 87: Approve, Reject, or Revert

9. Reports and Data Extraction (Divisional Checker only)

Objective

To generate and download migration reports.

The **Policy Consolidation Report** card enables users to generate consolidated policy statistics by product within their designated office scope.

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Home | Data Migration

Data Migration
Select a module to get started

Policy Consolidation Report Division Head

Policy Master Data | Agent Master Data | Medical Master Data | **Policy Consolidation Report** | Download IMS Reports

Pic 88: Policy Consolidation Report card



Operation Guide on PLI/RPLI Data Migration Verification Tool

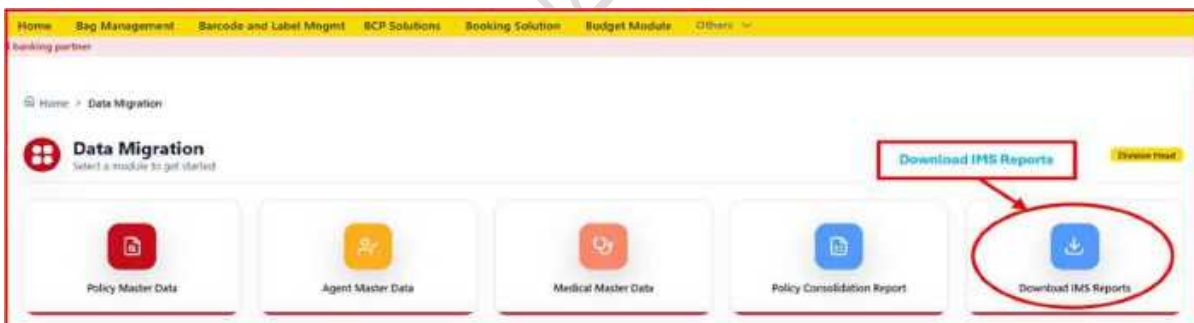


Department of Posts Ministry of Communications, Government of India				
Home Bag Management BCP Solutions Budget Module Career and Skill Development Customer Relationship Others				
Home > Policy Consolidation				
Policy Consolidation Consolidation report by Agents to assist for your official work				
Filter (24/08/2020) [Download]				
All Products	FY	QFY		
Active Policies	Active Policies	Active Policies		
Cash Account	Cash Account	Cash Account		
Premium Account	Premium Account	Premium Account		
Loan Collection	Loan Collection	Loan Collection		
Loan Outstanding	Loan Outstanding	Loan Outstanding		
Policy by State				
State	Number	State	Number	State
20,968	11,756	10,785	2,937	1,400
Number of Agents	722	558	121	18
Number of Agents	9	7	5	1

Pic 89: Policy Consolidation Report

Users can click on the **Refresh** button on the top right-side corner of the page to Refresh the data. Users can click on the rupee figure to see the exact amount.

User click on the **Download IMS Reports** card to download the Policy or Collections report into an Excel file



Pic 90: Download IMS Reports

Upon clicking on the Download IMS Reports card, Users select **Report Type & Verification status** from the drop-down menu and click on Download Report.



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Home > Download IMS Reports

Download IMS Reports

Pick a report type and download it directly as an Excel file.

Report Type: Policy

Verification Status: All statuses

Download Report

Pic 91: Download Report