

INSURANCE MANAGEMENT SOLUTION

Salient Features | Operational Overview

Centre for Excellence in Postal Technology
Department of Posts • Ministry of Communications • Government of India

Created By
Vishwesh Pathak
Trainer Solapur Division
Solapur 413001
9822825206



Working Staff

- 1) Counter PA
- 2) CPC User
- 3) QC
- 4) Approver

Counter PA

What's New & Updates

Latest announcements · APT

All the staff are requested to login with TOTP instead of OTP

05 Mar 2026

DOP UPDATE

IMPLEMENTED

From 08 March 2026 onwards all users should ensure to use TOTP application provided for Two Factor Authentication.

05 Mar 2026

DOP UPDATE

IMPLEMENTED

Android Users: Please download the latest APT TOTP App (Version 1.0.2+1) by scanning the QR code on the login flow step 2. After installing, logout and login again in TOTP Application to reconfigure TOTP by scanning the new QR code shown in step 3 of Login flow

18 Jul 2025

DOP UPDATE

IMPLEMENTED

Welcome to APT

13 Jul 2026

POS FEATURE

IMPLEMENTED

****Delivery Management Module Update**** ****Enhancement in Article Internal Tracking**** ****Change:**** Tracking history is now available for ****up to 150 days****.

09 Jul 2026

POS UPDATE

IMPLEMENTED

The Missent Article Report is now available under the Reports card. **Features:** Includes all the required report fields. Data is available from the APT Rollout onwards. Supports Excel download. Supports PDF download.

11 Mar 2026

DOP UPDATE

IMPLEMENTED

DAK SEWA JAN SEWA

Welcome User!

Enter your credentials to sign in

Employee ID

10335875

User ID

Password

.....

Password

Forgot/Reset Password?

Sign In

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Track Claim

Track claim status and history

New Business Quotes

Policy Indexing

Reports

Upload Policy Docs

Track Proposal/Policy

Special Group Collection

SGC and Processing



Non Financial Indexing

Index all NFS requests

[Click here for New Business Quotes](#)

Quote Calculation

training.cept.gov.in/imspolicyissue/quote-calculation



Department of Posts
Ministry of Communications, Government of India

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HomeIMS CLAIMSPLI Policy IssuePOLICY MANAGEMENT

Quote Calculation

Calculate insurance premium quote in simple steps

STEPS

1 of 3

1Quote Details

Enter personal info, policy, and quote details

2Quote Results

Select premium option

3Quote Generated

Download quote document

Personal Information

Enter personal and contact details first.

Insurant Name *

Vishwesh

Gender *

Male

Employment Category *

Central Government

Age Proof Type *

Standard

Mobile Number

Enter 10-digit mo

Email Address

Enter email address

Pincode *

413601

Policy Selection

Choose policy type and product after personal details.

Select Product *

PLI (Postal Life Insurance)

Select either PLI or RPLI based on your eligibility

Select Policy *

Endowment Assurance - Santosh

Date of Birth *

18/06/1984

Age: 43 years

Quote Parameters

Enter sum assured and payment details last.

Sum Assured *

₹ Enter sum assured amount

Premium Ceasing Age *

Select premium ceasing age

Data Entry

Windows Taskbar

Search

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Quote Calculation

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Home

IMS CLAIMS

PLI Policy Issue

POLICY MANAGEMENT

Conditions and services

Track your packages online

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India Post Payments Bank - Your trusted banking partner

Quote Details

Enter personal info, policy, and quote details

2

Quote Results

Select premium option

3

Quote Generated

Download quote document

Age Proof Type *

Standard

Mobile Number

Enter 10-digit mobile number

Email Address

Enter email address

Pincode *

413601

Policy Selection

Choose policy type and product after personal details.

Select Product *

PLI (Postal Life Insurance)

Select either PLI or RPLI based on your eligibility

Select Policy *

Endowment Assurance - Santosh

Date of Birth *

18/06/1984

Age: 43 years

Quote Parameters

Enter sum assured and payment details last.

Sum Assured *

₹ 3,00,000

Range: ₹20,000 - ₹50,00,000

Premium Ceasing Age *

60 years

Age at which premium payments will cease

Calculate Quote >

Insert

Sum Assured & Premium Ceasing Age

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29-09-2026

Quote Calculation

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HomeIMS CLAIMSPLI Policy IssuePOLICY MANAGEMENT

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2 of 3

Quote Details
Enter personal info, policy, and quote details

Quote Results
Select premium option

Quote Generated
Download quote document

Your Quote
Santosh

Sum Assured	Policy Ceasing Age	Monthly Quote*	Quarterly Quote*	HalfYearly Quote*	Annually Quote*
<div>COVERAGE</div> ₹3,00,000	60 years	<div>PREMIUM <div>SELECTED</div></div> ₹1,485 <div>BONUS ₹2,65,200</div> <div>MATURITY ₹5,65,200</div>	<div>PREMIUM <div>CHOOSE</div></div> ₹4,449 <div>BONUS ₹2,65,200</div> <div>MATURITY ₹5,65,200</div>	<div>PREMIUM <div>CHOOSE</div></div> ₹8,778 <div>BONUS ₹2,65,200</div> <div>MATURITY ₹5,65,200</div>	<div>PREMIUM <div>CHOOSE</div></div> ₹17,286 <div>BONUS ₹2,65,200</div> <div>MATURITY ₹5,65,200</div>

You can also opt for below Sum Assured

Sum Assured	Policy Ceasing Age	Monthly Quote*	Quarterly Quote*	HalfYearly Quote*	Annually Quote*
<div>COVERAGE</div> ₹4,00,000	60 years	<div>PREMIUM <div>CHOOSE</div></div> ₹1,980 <div>BONUS ₹3,53,600</div> <div>MATURITY ₹7,53,600</div>	<div>PREMIUM <div>CHOOSE</div></div> ₹5,932 <div>BONUS ₹3,53,600</div> <div>MATURITY ₹7,53,600</div>	<div>PREMIUM <div>CHOOSE</div></div> ₹11,704 <div>BONUS ₹3,53,600</div> <div>MATURITY ₹7,53,600</div>	<div>PREMIUM <div>CHOOSE</div></div> ₹23,048 <div>BONUS ₹3,53,600</div> <div>MATURITY ₹7,53,600</div>
<div>COVERAGE</div> ₹5,00,000	60 years	<div>PREMIUM <div>CHOOSE</div></div> ₹2,475 <div>BONUS ₹4,42,000</div> <div>MATURITY ₹9,42,000</div>	<div>PREMIUM <div>CHOOSE</div></div> ₹7,415 <div>BONUS ₹4,42,000</div> <div>MATURITY ₹9,42,000</div>	<div>PREMIUM <div>CHOOSE</div></div> ₹14,630 <div>BONUS ₹4,42,000</div> <div>MATURITY ₹9,42,000</div>	<div>PREMIUM <div>CHOOSE</div></div> ₹28,810 <div>BONUS ₹4,42,000</div> <div>MATURITY ₹9,42,000</div>
<div>COVERAGE</div> ₹6,00,000	60 years	<div>PREMIUM <div>CHOOSE</div></div> ₹2,970 <div>BONUS ₹5,30,400</div> <div>MATURITY ₹11,30,400</div>	<div>PREMIUM <div>CHOOSE</div></div> ₹8,898 <div>BONUS ₹5,30,400</div> <div>MATURITY ₹11,30,400</div>	<div>PREMIUM <div>CHOOSE</div></div> ₹17,556 <div>BONUS ₹5,30,400</div> <div>MATURITY ₹11,30,400</div>	<div>PREMIUM <div>CHOOSE</div></div> ₹34,572 <div>BONUS ₹5,30,400</div> <div>MATURITY ₹11,30,400</div>
<div>COVERAGE</div> ₹7,00,000	60 years	<div>PREMIUM <div>CHOOSE</div></div> ₹3,465 <div>BONUS ₹6,18,800</div> <div>MATURITY ₹13,18,800</div>	<div>PREMIUM <div>CHOOSE</div></div> ₹10,381 <div>BONUS ₹6,18,800</div> <div>MATURITY ₹13,18,800</div>	<div>PREMIUM <div>CHOOSE</div></div> ₹20,482 <div>BONUS ₹6,18,800</div> <div>MATURITY ₹13,18,800</div>	<div>PREMIUM <div>CHOOSE</div></div> ₹40,334 <div>BONUS ₹6,18,800</div> <div>MATURITY ₹13,18,800</div>

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29-09-2026

Quote Calculation

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Quote Details
Enter personal info, policy, and quote details

Quote Results
Select premium option

Quote Generated
Download quote document

BONUS₹2,65,200

MATURITY₹5,65,200

BONUS₹2,65,200

MATURITY₹5,65,200

BONUS₹2,65,200

MATURITY₹5,65,200

BONUS₹2,65,200

MATURITY₹5,65,200

You can also opt for below Sum Assured

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< Back

& Create Quote

Create Quote >

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Search

ENG IN

12:0029-09-2026



INSURANCE QUOTE

India Post Life Insurance

Department of Posts, Government of India



Required while indexing

Quote Reference Number: QT-PLI-2026-00015997

Personal Information	
Proposer Name	Vishwesh
Gender	MALE
Date of Birth	18/06/1984
Employment Category	CENTRAL_GOVT

Product Details	
Product Name	Santosh
Policy Term	17 years
Policy Ceasing Age	60

Premium Information	
Premium Amount	Rs. 1,485
Payment Frequency	MONTHLY
Sum Assured	Rs. 3,00,000
Tentative Bonus	Rs. 2,65,200
Tentative Maturity Value	Rs. 5,65,200

Contact Information	
Mobile Number	N/A
Email ID	N/A
Pincode	413601

Important Note:

This is a quote for illustrative purposes only and does not constitute a contract of insurance. The actual premium and terms may vary based on underwriting and medical examination. Please contact India Post Life Insurance for complete details.

- **Policy Indexing**

Complete the steps below

Step 1 of 5

STEPS

1 of 5

1 Eligibility

Check eligibility

2 Product Selection

3 Customer Details

Premium Info

Sum Assured & Frequency

Summary

Review & Submit

Eligibility

Select the product and establish the proposer's eligibility.

Select Product *

- PLI (Postal Life Insurance)
For postal employees and their families

☐ RPLI (Rural Postal Life Insurance)

For proposers with rural residence, or an operative savings bank account with POSB or a Scheduled Bank

 PLI Eligibility

Educational Qualification *

Graduate

Occupation *

Central Government

Enter Parent's in case of child policy.

Enter Parent's in case of child policy.

PLI eligibility confirmed.

Q Quote Reference Number

Optional. Enter an existing quote reference or mobile number to prefill customer and premium details.

OT-PLI-2026-00015997

Q Load Quote

✕ Clear

Quote loaded. Customer and premium details have been prefilled.

[← Previous](#)

Next Step →

[Click here for Next Step](#)

Complete the steps below

2 of 5

2 Product Selection
Choose product

3 Customer Details

Personal & Contact details

4 Premium Info

5 Summary
Review & Submit

Choose the product type and policy for this application

Select Policy *

Endowment Assurance - Santosh

Selected during eligibility. Go back to the Eligibility step to change it.

Would you like a physical copy of the policy bond after approval? * ☐ Yes ☐ No

[← Previous](#)

Next Step

[Click here for Next Step](#)

training.cept.gov.in/imspolicyissue/policy-issue/without-aadhar?quote_reference=QT-PLI-2026-00015997

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STEPS
3 of 5

Eligibility
Check eligibility

Product Selection
Choose product

Customer Details
Personal & Contact details

Premium Info
Sum Assured & Frequency

Summary
Review & Submit

Customer Details

Enter personal and application details

Issue Office
Solapur H.O.

CPC Office
Solapur H.O.

Divisional Office
Solapur Division

Circle Office
Maharashtra Circle

Customer Search
Search using any available customer detail

Agent Search

Click here for create Customer (For new Customer)
Select check box if already policy holder

☐ Is Customer available

Create Customer

☐ Is Agent available

Select Agent Code

First Name *
Vishwesh

Middle Name
Enter Middle Name

Last Name *
Enter Last Name

Gender *
Male

Date of Birth *
18/06/1984
Current age: 42 years

Age Proof Type *
Select an option

Primary Mobile *
10 digit mobile number

Primary Email
Enter Email

Application Dates

Application Receipt Date *
DD/MM/YYYY

Date of Declaration *
DD/MM/YYYY

Date of Proposal *
DD/MM/YYYY

Date of Indexing *
DD/MM/YYYY

Set all dates to today

Previous

Next Step →

Insert Customer Details

Insert Application, Date of Declaration, Date of Proposal & Date of Indexing

Click here for Next Step

12:04
29-09-2026

Customer Onboarding

Create a new PLI / RPLI customer

Identity

Salutation *

Select here 

First Name ★

Enter here

Middle Name

Enter here

Last Name ☆

Enter here

Date of Birth ★

DD/MM/YYYY 

Gender ★

Select here

Nationality ★

Indian

Marital Status ★

Select here

Father's Name

Enter here

Insert Customer Details with Adhaar, PAN & Address

Documents

Aadhaar Number ★

12 digit Aadhaar

PAN

ABCDP1234F

Permanent Address

Address Line 1 *

Enter here

Address Line 2

Enter here

Village / Locality

Enter here

Mandal / Sub-District

Enter here

Contact

Mobile Number *	Email *
10 digit mobile	name@example.com

Mobile number & Email ID

Proof Document (optional)

Attach a scan or photo to create the customer with a supporting identity document.

Document Type

Aadhaar

[Upload Document](#)



Click to upload or drag and drop
Accepted: .pdf

Accepted: .pdf

Customer Photo

Upload the customer photograph. It is sent to the onboarding API as photo_base64.

Customer Photo

Click to upload or drag and drop

Accepted: .jpg, .jpeg, .png

Click to upload or drag and drop
Accepted: .jpg,.jpeg,.png

Accepted: .jpg,.jpeg,.png

Consent for Collection & Processing of Personal Data

I authorise the Department of Posts (India Post) to collect, store, and process the personal data and documents I provide — including identity, contact, KYC, and financial details — for the purpose of onboarding, servicing, and administering my Postal Life Insurance / Rural Postal Life Insurance policy.

I understand that:

- My data will be used only for the purposes stated above and as required under applicable law.
- Where I have provided Aadhaar/KYC details, these will be used solely for identity verification as permitted by law.
- I may withdraw this consent at any time, and may request access to or correction of my data, by contacting the Department of Posts. Withdrawal will not affect processing already carried out.
- My data will be retained only as long as necessary or as mandated by regulation.

Upload Adhaar & Photo of Customer

☐ I have read and agree to the above. (required)

☐ I agree to receive service communications via SMS / Email / WhatsApp. (optional)

Click on the both Check box

Click on Create Customer

[Cancel](#) [Create Customer](#)

training.cept.gov.in/imspolicyissue/policy-issue/without-aadhar?quote_reference=QT-PLI-2026-00015997

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PLI Policy Issue

POLICY MANAGEMENT

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Home

Policy Indexing

Index

Policy Indexing

Complete the steps below

Step 4 of 5

4 of 5

Eligibility

Check eligibility

Product Selection

Choose product

Customer Details

Personal & Contact details

4 Premium Info

Sum Assured & Frequency

5 Summary

Review & Submit

Premium Information

Configure sum assured and premium details

Available Policies

Policy: 100000152 SA: ₹5,50,000 Status: ACTIVE

Total: ₹5,50,000

Sum Assured *

₹ 3,00,000

Min: ₹20,000, Max: ₹50,00,000

Premium Ceasing Age *

60 years

Age at which premium payments will cease

Premium Payment Frequency *

Monthly

Previous

Next

Click on Next

- 1 **Eligibility**
Check eligibility
- 2 **Product Selection**
Choose product
- 3 **Customer Details**
Personal & Contact details
- 4 **Premium Info**
Sum Assured & Frequency
- 5 **Summary**
Review & Submit

Verify all details before submission

Category	Details
Name	VISHWESH PATHAK
Gender	MALE
Date of Birth	1984-06-18
Age Proof Type	STANDARD
Mobile	9822825206
Email	PVISH18@GMAIL.COM
Carrier Type	PLI
Product	Santosh
Sum Assured	₹300000
Premium Ceasing Age	60 years
Premium Frequency	MONTHLY
Net Premium	₹1,485
Total First Payment	₹1,485
Physical Bond Needed	YES

← Previous

Submit

Click on Submit



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Your policy application has been indexed.

Proposal Number

PLI-2026-00001130

Proposer Name

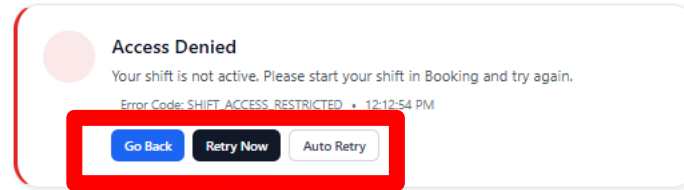
VISHWESH PATHAK

Total First Premium

₹1,485

[Index Another Policy](#) [Download Receipt](#) Pay First Premium

Pay First Premium



If Booking counter Shift begin not happened.

First do the Shift begin of Booking Counter & then retry p

DOP IT 2.0 - IMS Policy Issue

Collections — PLI 2.0

DOP IT 2.0

training.cept.gov.in/plipolicymanagement/policy-services/collections?collection_type=INITIAL&proposal_number=PLI-2026-00001130

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Booking Solution

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Home > Collections

Collections

Select a collection type, add multiple policies, calculate, and process payment for all at once

Select Collection Type *

Initial Collection

Proposal Number

Enter proposal number

Add Proposal

Initial Collection

1 Policy Added

Policy Details

Search...

Proposal Number	Customer Name	Policy Type	Plan	Frequency	Sum Assured	Policy Term	Premium Amt	Total Premium Amt
PLI-2026-00001130	VISHWESH PATHAK	PLI	PLI/EA-60 (SANTOSH)	MONTHLY	300000	17	₹1,485	1485

Total Policies: 1

Grand Total: ₹1,485

Payment Details

Total Collection Amount

₹1,485 (One Thousand Four Hundred Eighty Five Rupees Only)

Payment Method *

Cash

Enter Amount

1485

Click on Authorize Payment

Authorize Payment — ₹1,485

Rules/Guidelines

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ENG

IN

12:17

29-09-2026

- Collections

Select a collection type, add multiple policies, calculate, and process payment for all at once

Select Collection Type ★

Policy Number

-- Choose Collection Type --

Enter policy number

Payment Receipt

Receipt #20261485447736811856

Success

Proposal Number:

PLI-2026-00001130

Receipt No.:

20261485447736811856

Amount:

₹1,485

[Print Receipt](#)[Print Receipt](#)

New Collection

Receipts Generated

Proposal: PLI-2026-00001130



1

Office: Solapur R.O (24360038)
29/09/2026, 12:18:14 | Counter: 1
Receipt No: 202614854473481186
Type: Initial Collection
Customer: VISHNULAX PATILAN
Proposal: PLI-2026-00001130
Amount: Rs. 1485.00
Paid: Rs. 1485.00 Mode: Cash
OP ID: 10074869 | Thank You!
NOTE: Risk coverage commences from the date of acceptance.

Office: Solapur R.O (24360038)
29/09/2026, 12:18:14 | Counter: 1
Receipt No: 202614854473481186
Type: Initial Collection
Customer: VISHNULAX PATILAN
Proposal: PLI-2026-00001130
Amount: Rs. 1485.00
Paid: Rs. 1485.00 Mode: Cash
OP ID: 10074869 | Thank You!
NOTE: Risk coverage commences from the date of acceptance.



[Continue](#)

Note: Printing is available only on this page. Re-printing will not be possible once you click the **Continue** button.

Click on Print

CPC USER

भारतीय डाक . डाक सेवा जन सेवा

Government of India

LIVE

Latest announcements · APT

05 Mar 2026

DOP

UPDATE

IMPLEMENTED

From 08 March 2026 onwards all users should ensure to use TOTP application provided for Two Factor Authentication.

05 Mar 2026

DOP

UPDATE

IMPLEMENTED

Android Users: Please download the latest APT TOTP App (Version 1.0.2+1) by scanning the QR code on the login flow step 2. After installing, logout and login again in TOTP Application to reconfigure TOTP by scanning the new QR code shown in step 3 of Login flow

18 Jul 2025

DOP

UPDATE

IMPLEMENTED

Welcome to APT

13 Jul 2026

POS

FEATURE

IMPLEMENTED

🔔 **Delivery Management Module Update** **🔄 **Enhancement in Article Internal Tracking**** **✅ **Change:**** Tracking history is now available for ****up to 150 days****.

09 Jul 2026

POS

UPDATE

IMPLEMENTED

The Missent Article Report is now available under the Reports card. 🌟 Features: 📄
Includes all the required report fields. 📅 Data is available from the APT Rollout onwards.
📄 Supports Excel download. 📄 Supports PDF download.

11 Mar 2026

DOP

UPDATE

IMPLEMENTED

DAK SEWA JAN SEWA

Welcome User!

Enter your credentials to sign in

Employee ID



User ID

Password



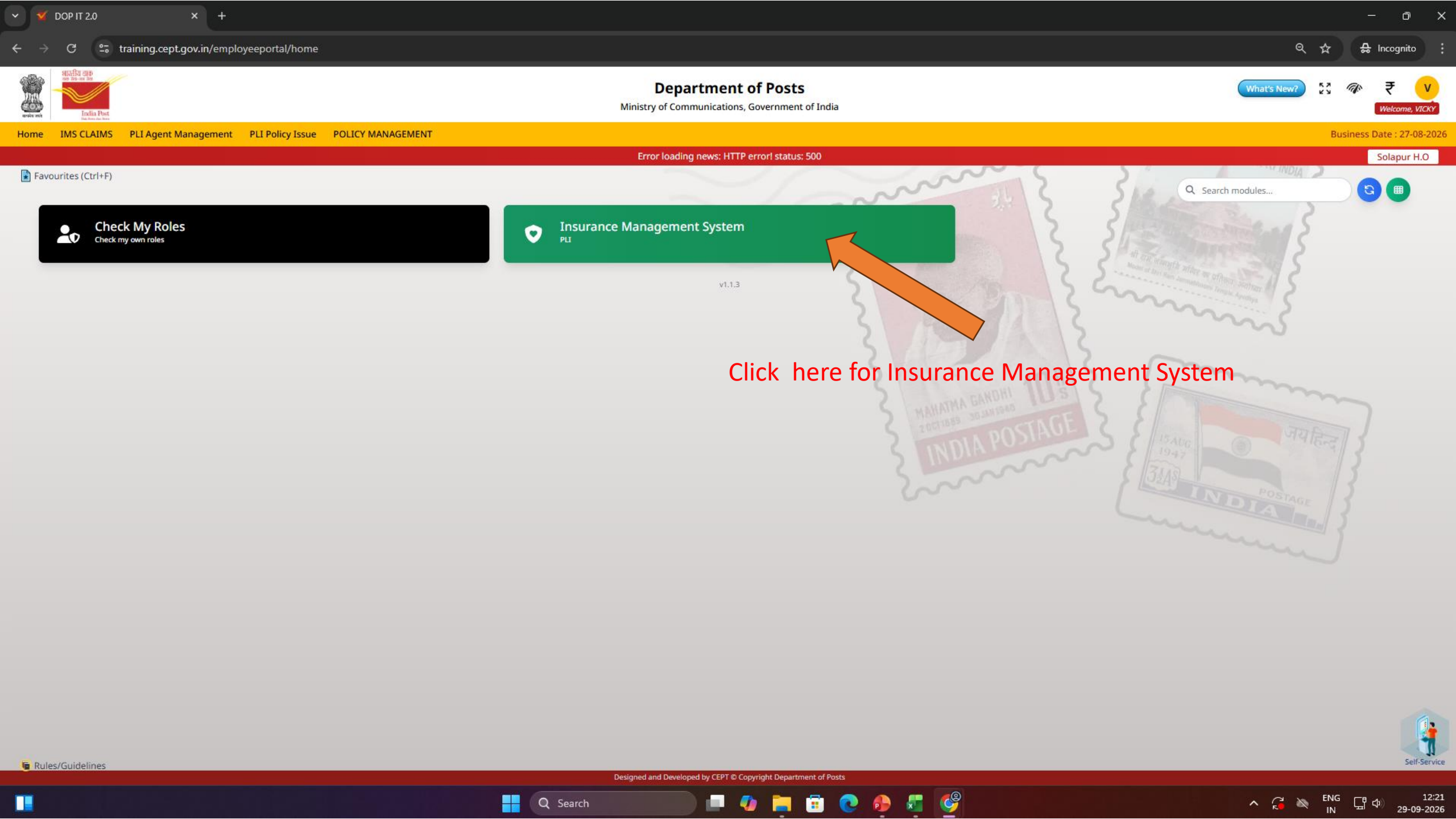
Password



Forgot/Reset Password?

Sign In

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Department of Posts
Ministry of Communications, Government of India

What's New?

Welcome, VICKY

Business Date : 27-08-2026

Solapur H.O

Favourites (Ctrl+F)

Check My Roles
Check my own roles

Insurance Management System
PLI

v1.1.3

Search modules...

Click here for Insurance Management System

Rules/Guidelines

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DOP IT 2.0

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What's New?

₹

V

Welcome, VICKY

HomeIMS CLAIMSPLI Agent ManagementPLI Policy IssuePOLICY MANAGEMENT

Business Date : 27-08-2026

Error loading news: HTTP error! status: 500

Favourites (Ctrl+F)

Insurance Management System

Select a service to get started

Inbox

3 inboxes available across your micro-services

Claims

Claims processing & appeals

Reports

Claim reports

Track Claim

Track claim status and history

Claims Processing

Process claims submitted

Claims Submission

Index PLI/RPLI claims

PLI Agent

Agents, incentives & leads

Agent Management

Agent Incentive Management

PLI Employer Management

Policy Issue

Policy issuance, indexing & documents

New Business Quotes

Policy Indexing

Reports

Upload Policy Docs

Print Policy Documents

Bond Dispatch

Track Proposal/Policy

Policy Indexing

12:21

29-09-2026

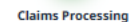
Claims processing & appeals

Reports

Claim reports

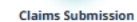


Track Claim

[Track claim status and history](#)

Claims Processing

Process claims submitted

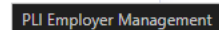


Claims Submission

Index PLI/RPLI claims

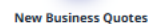
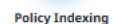
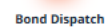
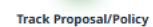
Agents, incentives & leads

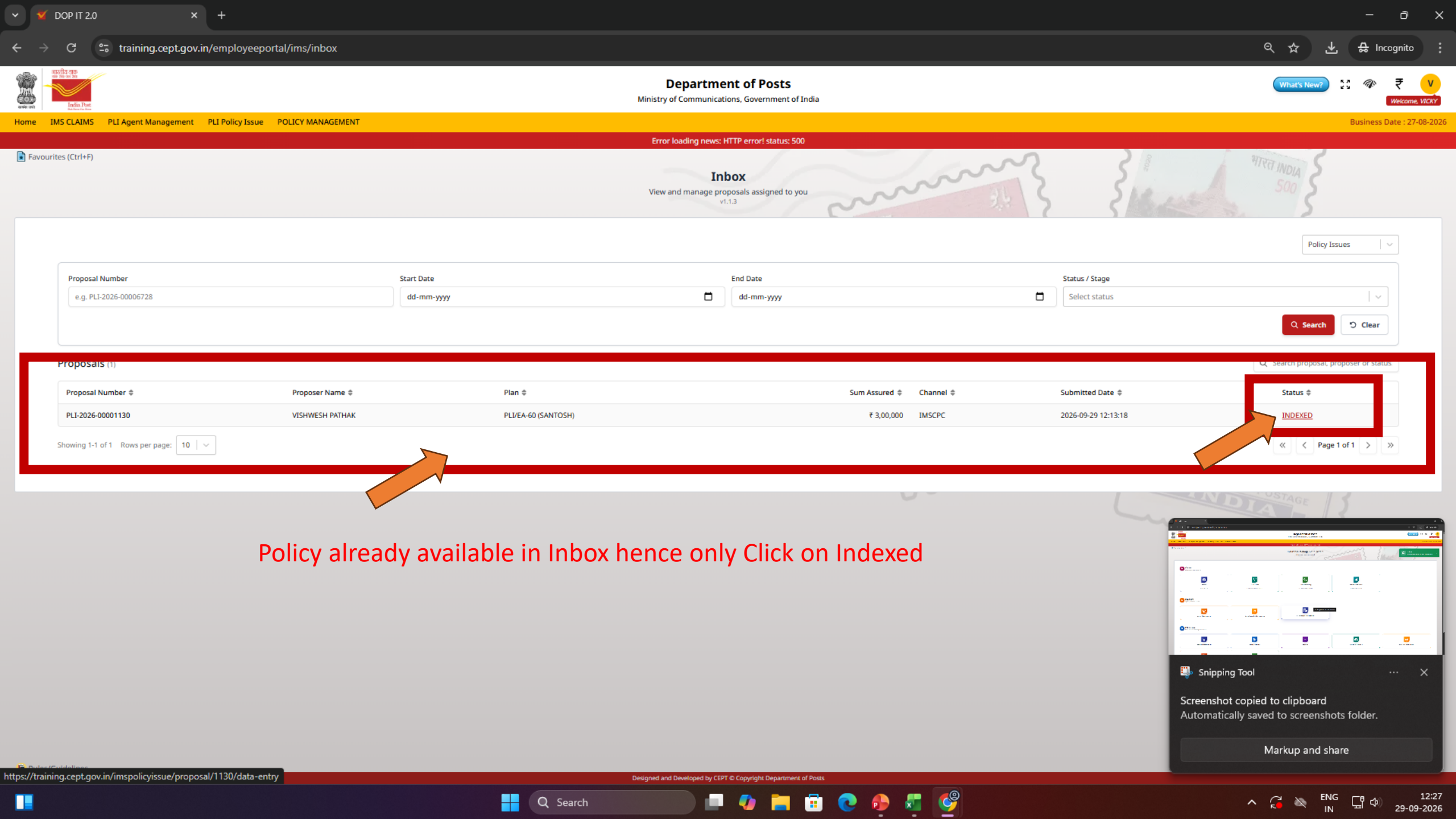
Agent Management



PLI Employer Management

Policy issuance, indexing & documents





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Home IMS CLAIMS PLI Agent Management PLI Policy Issue POLICY MANAGEMENT

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Favourites (Ctrl+F)

Inbox
View and manage proposals assigned to you
v1.1.3

Policy Issues

Proposal Number Start Date End Date Status / Stage

e.g. PLI-2026-00006728 dd-mm-yyyy dd-mm-yyyy Select status

Search Clear

Proposals (1)

Proposal Number	Proposer Name	Plan	Sum Assured	Channel	Submitted Date	Status
PLI-2026-00001130	VISHWESH PATHAK	PLI/EA-60 (SANTOSH)	₹ 3,00,000	IMSCPC	2026-09-29 12:13:18	INDEXED

Showing 1-1 of 1 Rows per page: 10

Policy already available in Inbox hence only Click on Indexed

Snipping Tool

Screenshot copied to clipboard
Automatically saved to screenshots folder.

Markup and share

https://training.cept.gov.in/imspolicyissue/proposal/1130/data-entry

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ENG IN 12:27 29-09-2026

Step 2 of 10

STEPS

2 of 10

First Premium Details

Premium amount and payment details

- First Premium Status

1 paid receipt recorded

Paid

First Premium Paid

Total collected across 1 receipt.

Total Amount

₹1,485

Receipt 1

20261485447736811856

Amount Paid

₹1,485

Payment Date

29-09-2026

Payment Method

Cash

Receipt Number

20261485447736811856

Paid at office: Solapur H.O

Back

Next

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PLI Policy Issue

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Proposals

Proposal #PLI-2026-00001130

Data Entry

New Business Data Entry

Step 3 of 10

PROPOSAL ID PLI-2026-00001130	PROPOSER NAME VISHWESH PATHAK	PRODUCT TYPE PLI-EA/60yrs - Santosh	SUM ASSURED ₹ 300000	PREMIUM ₹ 1485	FREQUENCY MONTHLY	CUSTOMER ID 96830896	STATUS DATA_ENTRY	CHANNEL PO	ENTRY PATH WITHOUT_EKYC
----------------------------------	----------------------------------	--	-------------------------	-------------------	----------------------	-------------------------	----------------------	---------------	----------------------------

STEPS
3 of 10

Agent Details

Agent information and correspondence

First Premium Details

Premium amount and payment details

Insurant Details

Personal information of insured

Nominations

Nominee and appointee details

Existing Policy Details

Existing policies of the insured

Base Coverage

Coverage amount and term

Medical Information

Health and medical history

Bank Details

Bank account details

Documents

Verify proposal documents

Submit to Quality Check

Review and submit application

Insurant Details

Personal information of insured

Customer Lookup

Search By

Customer Search

Customer ID

96830896

Create Customer

Customer Id: 96830896

Insured Details

Salutation

Mr.

First Name

VISHWESH

Middle Name

Enter middle name (optional)

Last Name

PATHAK

Gender

Male

Date of Birth

18/06/1984

Marital Status

Married

Nationality

INDIAN

Father's Name

Enter father's name

Mother's Name

Enter Mother's name

Spouse's Name

Enter Spouse's name (if applicable)

Policy Taken Under

Other (self-purchase)

AGE PROOF DETAILS

Age Proof Type

Standard

Document Type

PAN

Aadhaar Number

692742182211

PAN Number

AQBPP9717A

Save

Fill the mandatory columns & Save

12:29

29-09-2026

training.cept.gov.in/imspolicyissue/proposal/1130/data-entry

PROPOSAL ID
PLI-2026-00001130

PROPOSER NAME
VISHWESH PATHAK

PRODUCT TYPE
PLI-EA/60yrs - Santosh

SUM ASSURED
₹ 300000

PREMIUM
₹ 1485

FREQUENCY
MONTHLY

CUSTOMER ID
96830896

STATUS
DATA_ENTRY

CHANNEL
PO

ENTRY PATH
WITHOUT_EKYC

HomeIMS CLAIMSPLI Agent ManagementPLI Policy IssuePOLICY MANAGEMENT

10 Submit to Quality Check
Review and submit application

Standard

PAN

692742182211

PAN Number *

AQ8PP9717A

Edit

Address Details

PERMANENT ADDRESS

Address Line 1 *

Address Line 2

Address Line 3

Village

Mandal

City *

District

State *

Country

Pincode *

COMMUNICATION ADDRESS

Address Line 1 *

Address Line 2

Address Line 3

Village

Mandal

City *

District

State *

Country

Pincode *

Save

Contact Details

Mobile Number *

Email Address *

Fill the mandatory columns & Save

10 Submit to Quality Check
Review and submit application

Standard

PAN

692742182211

PAN Number *

AQ8PP9717A

Edit

Address Details

PERMANENT ADDRESS

Address Line 1 *

Address Line 2

Address Line 3

Village

Mandal

City *

District

State *

Country

Pincode *

COMMUNICATION ADDRESS

Address Line 1 *

Address Line 2

Address Line 3

Village

Mandal

City *

District

State *

Country

Pincode *

Save

Contact Details

Mobile Number *

Email Address *

Fill the mandatory columns & Save

10 Submit to Quality Check
Review and submit application

10 Submit to Quality Check
Review and submit application

PROPOSAL ID
PLI-2026-00001130

PROPOSER NAME
VISHWESH PATHAK

PRODUCT TYPE
PLI-EA/60yrs - Santosh

SUM ASSURED
₹ 300000

PREMIUM
₹ 1485

FREQUENCY
MONTHLY

CUSTOMER ID
96830896

STATUS
DATA_ENTRY

CHANNEL
PO

Employment details saved.

HomeIMS CLAIMSPLI Agent ManagementPLI Policy IssuePOLICY MANAGEMENT

413601

COMMUNICATION ADDRESS

Address Line 1 *

ARYA CHOWK TULIAPUR

Address Line 2

Enter address line 2

Address Line 3

Enter address line 3

Village

Enter village

Mandal

Enter mandal

City *

TULIAPUR

District

DHARASHIV

State *

Maharashtra

Country

INDIA

Pincode *

413601

Edit

Same as permanent address

Contact Details

Mobile Number *

9822825206

Email Address *

P.VISH18@GMAIL.COM

Save

Edit

Employment Details (Enter Parent's Details in case of Child Policy)

Occupation *

Central Government

PAO / DDO Code

Enter PAO / DDO code

Organization

Enter organization

Designation

Enter designation

Date of Entry

DD/MM/YYYY

Superior's Designation

Enter superior's designation

PAN Number

AQ8PP9717A

Annual Income *

₹ 10,00,000

Qualification *

Graduate

Back

Edit

Next

CPC user can Edit here & Next

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Data Entry

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IMS CLAIMS

PLI Agent Management

PLI Policy Issue

POLICY MANAGEMENT

PROPOSAL ID

PLI-2026-00001130

PROPOSER NAME

VISHWESH PATHAK

PRODUCT TYPE

PLI-EA/60yrs - Santosh

SUM ASSURED

₹ 300000

PREMIUM

₹ 1485

FREQUENCY

MONTHLY

CUSTOMER ID

96830896

STATUS

DATA_ENTRY

CHANNEL

PO

ENTRY PATH

WITHOUT_EKYC

STEPS

4 of 10

Agent Details

Agent information and correspondence

First Premium Details

Premium amount and payment details

Insurant Details

Personal information of insured

Nominations

Nominee and appointee details

Existing Policy Details

Existing policies of the insured

Base Coverage

Coverage amount and term

Medical Information

Health and medical history

Bank Details

Bank account details

Documents

Verify proposal documents

Submit to Quality Check

Review and submit application

Nominations

Nominee and appointee details

Total Share Allocated

100% / 100%

Nominee #1

Search By

Customer Search

Search By

Enter search value

Q

Create Customer

Reset

Mrs.

Supriya

Enter middle name

Last Name *

Pathak

Gender *

Female

Date of Birth *

11/03/1990

Relationship *

Spouse

Share % *

100

Phone *

9823825206

Email

name@example.com

NOMINEE ADDRESS

Copy address from proposer

Address Line 1 *

ARYA CHOWK TULIAPUR

Address Line 2

Enter address line 2

Village

Enter village

Mandal

Enter mandal

District

DHARASHIV

City *

TULIAPUR

State *

Maharashtra

Pincode *

413601

Q

+ Add Nominee

Back

Insert nominee Details

Save & Continue

Save & Continue

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12:32

29-09-2026

PROPOSAL ID	PROPOSER NAME	PRODUCT TYPE	SUM ASSURED	PREMIUM	FREQUENCY	CUSTOMER ID	STATUS	CHANNEL	ENTRY PATH
PLI-2026-00001130	VISHWESH PATHAK	PLI-EA/60yrs - Santosh	₹ 300000	₹ 1485	MONTHLY	96830896	DATA_ENTRY	PO	WITHOUT_EKYC

STEPS
5 of 10

- **Agent Details**
Agent information and correspondence
- **First Premium Details**
Premium amount and payment details
- **Insurant Details**
Personal information of insured
- **Nominations**
Nominee and appointee details
- **Existing Policy Details**
Existing policies of the insured
- **Base Coverage**
Coverage amount and term
- **Medical Information**
Health and medical history
- **Bank Details**
Bank account details
- **Documents**
Verify proposal documents
- **Submit to Quality Check**
Review and submit application

Existing Policy Details

Existing policies of the insured

Existing Policies

#	Product Type	Category	Policy Number	Sum Assured	Details
1	<div>PLI</div>	<div>Endowment Assurance (EA)</div>	<div>100000152</div>	<div>550000</div>	<div>Optional notes</div>

+ Add Policy

Existing Policies Sum Assured

₹5,50,000

This Policy Sum Assured

₹3,00,000

Total Sum Assured

₹8,50,000

Back

Save & Continue

Save & Continue



New Business Data Entry

Step 6 of 10

PROPOSAL ID PLI-2026-00001130	PROPOSER NAME VISHWESH PATHAK	PRODUCT TYPE PLI-EA/60yrs - Santosh	SUM ASSURED ₹ 300000	PREMIUM ₹ 1485	FREQUENCY MONTHLY	CUSTOMER ID 96830896	STATUS DATA_ENTRY	CHANNEL PO	ENTRY PATH WITHOUT_EKYC
----------------------------------	----------------------------------	--	-------------------------	-------------------	----------------------	-------------------------	----------------------	---------------	----------------------------

STEPS

6 of 10

Agent Details

Agent information and correspondence

First Premium Details

Premium amount and payment details

Insurant Details

Personal information of insured

Nominations

Nominee and appointee details

Existing Policy Details

Existing policies of the insured

6 Base Coverage

Coverage amount and term

Base Coverage

Coverage amount and term

Policy Coverage

Sum Assured *

₹ 3,00,000

Premium Ceasing Age / Term *

60

Premium Frequency *

Monthly

Subsequent Premium Payment Mode *

Select payment mode

Cumulative Sum Assured

₹8,50,000

Base Premium

₹1,485

PAY_RECOVERY

CASH

ONLINE

SI

eNACH

Total Premium

₹1,485

Short Excess Premium

₹0

Derived — not editable.

Back

Select Payment mode

Save & Calculate

Save & Recalculate

PROPOSAL ID	PROPOSER NAME	PRODUCT TYPE	SUM ASSURED	PREMIUM	FREQUENCY	CUSTOMER ID	STATUS	CHANNEL	ENTRY PATH
PLI-2026-00001130	VISHWESH PATHAK	PLI-EA/60yrs - Santosh	₹ 300000	₹ 1485	MONTHLY	96830896	DATA_ENTRY	PO	WITHOUT_EKYC

STEPS

6 of 10

Base Coverage

Coverage amount and term

7 **Medical Information**
Health and medical history

8 **Bank Details**
Bank account details



DATA ENTRY

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VI

PROPOSAL ID PLI-2026-00001130	PROPOSER NAME VISHWESH PATHAK	PRODUCT TYPE PLI-EA/60yrs - Santosh	SUM ASSURED ₹ 300000	PREMIUM ₹ 1485	FREQUENCY MONTHLY	CUSTOMER ID 96830896	STATUS DATA_ENTRY	CHANNEL PO	ENTRY PATH WITHOUT_EKYC
----------------------------------	----------------------------------	--	-------------------------	-------------------	----------------------	-------------------------	----------------------	---------------	----------------------------

STEPS
7 of 10

Agent Details

First Premium Details

Insurant Details

Nominations

Existing Policy Details

Base Coverage

Medical Information

Bank Details

Documents

Submit to Quality Check

Medical Information

Health and medical history

Medical Declarations

Insured

☒ Is of sound health

HAS THE LIFE TO BE ASSURED EVER SUFFERED FROM:

☐ Tuberculosis, Asthma, Bronchitis, Blood Spitting, or other respiratory disorders

☐ Cancer, Tumor, Cysts or any other growth

☐ Paralysis

☐ Insanity

☐ Any disease of heart and lungs, chest pain, palpitation, rheumatic fever, heart murmur, heart attack, shortness of breath, or any other Heart related disorders

☐ Kidney disease prostrate, hydrocele and urinary system

☐ Any disease of brain, depression, mental/psychiatric ailment, multiple sclerosis, stroke, nervous system, stroke, parkinsonism

☐ HIV Positive/AIDS or any other sexually transmitted diseases

☐ Hepatitis-B or C or A

☐ Epilepsy

☐ Nervous disorder, Gastritis, Stomach or duodenal Ulcer, Hernia

☐ Symptoms/ailment relating to liver or reproductive system

☐ Leprosy

☐ Any physical deformity or handicap

☐ Any other serious disease

Family Doctor Name

If any

☐ Family hereditary condition

☐ Have you availed any kind of leave on medical ground or hospitalized during the last 3 years?

☐ Has physical deformity

Medical Required

Unsaved

Check this check boxes

Check this check boxes

Save & Continue

Save

Medical Examiner

Unsaved

12:35

29-09-2026

PROPOSAL ID
PLI-2026-00001130

PROPOSER NAME
VISHWESH PATHAK

PRODUCT TYPE
PLI-EA/60yrs - Santosh

SUM ASSURED
₹ 300000

PREMIUM
₹ 1485

FREQUENCY
MONTHLY

CUSTOMER ID
96830896

STATUS
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7Medical Information
Health and medical history

8Bank Details
Bank account details

9Documents
Verify proposal documents

10Submit to Quality Check
Review and submit application

☐ Any disease of brain, depression, mental/psychiatric ailment, multiple sclerosis, stroke, nervous system, stroke, parkinsonism

☐ HIV Positive/AIDS or any other sexually transmitted diseases

☐ Hepatitis-B or C or A

☐ Epilepsy

☐ Nervous disorder, Gastritis, Stomach or duodenal Ulcer, Hernia

☐ Symptoms/ailment relating to liver or reproductive system

☐ Leprosy

☐ Any physical deformity or handicap

☐ Any other serious disease

Family Doctor Name

If any

☐ Family hereditary condition

☐ Have you availed any kind of leave on medical ground or hospitalized during the last 3 years?

☐ Has physical deformity

Medical Examiner

Examiner Profile Code *

HP-PLI-101

Verify

Verified

Enter the doctor's examiner code and click Verify to verify examiner details.

Examiner Name *

DR DEEPTI RANA MO PHC DHAMETA DEEPTI RANA MO

Medical Examiner Remarks *

Remarks

Examiner's Medical Status *

Approved

Examination Date *

Back

Save

Next

Save all required sections to continue.

Examiner Details Information

Examiner Profile Code:HP-PLI-101

Examiner Name:DR DEEPTI RANA MO PHC
DHAMETA DEEPTI RANA MO
PHC DHAMETA

Officer Group:A

Handles Max Sum Assured of:₹5,00,000.00

Close

insert Doctor Code

Click on Close

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- 7 **Medical Information**
Health and medical history
- 8 **Bank Details**
Bank account details
- 9 **Documents**
Verify proposal documents
- 10 **Submit to Quality Check**
Review and submit application

☐ Kidney disease prostate, hydrocele and urinary system

☐ Any disease of brain, depression, mental/psychiatric ailment, multiple sclerosis, stroke, nervous system, stroke, parkinsonism

☐ HIV Positive/AIDS or any other sexually transmitted diseases

☐ Hepatitis-B or C or A

☐ Epilepsy

☐ Nervous disorder, Gastritis, Stomach or duodenal Ulcer, Hernia

☐ Symptoms/ailment relating to liver or reproductive system

☐ Leprosy

☐ Any physical deformity or handicap

☐ Any other serious disease

Family Doctor Name

If any

☐ Family hereditary condition

☐ Have you availed any kind of leave on medical ground or hospitalized during the last 3 years?

☐ Has physical deformity

Medical Examiner

Saved

Examiner Profile Code *

HP-PLI-101

Verify

Verified

Enter the doctor's examiner code and click Verify to auto-fill the examiner details.

Examiner Name *

DR DEEPTI RANA MO PHC DHAMETA DEEPTI RANA MO PHC DHAMETA

Examiner's Medical Status *

Approved

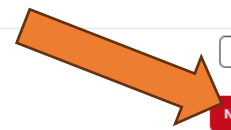
Examination Date *

29/09/2026

Medical Examiner Remarks *

Approved

Click on Next



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New Business Data Entry

Step 9 of 10

PROPOSAL ID
PLI-2026-00001130

PROPOSER NAME
VISHWESH PATHAK

PRODUCT TYPE
PLI-EA/60yrs - Santosh

SUM ASSURED
₹ 300000

PREMIUM
₹ 1485

FREQUENCY
MONTHLY

CUSTOMER ID
96830896

STATUS
DATA_ENTRY

CHANNEL
PO

ENTRY PATH
WITHOUT_EKYC

STEPS
9 of 10

Agent Details
Agent information and correspondence

First Premium Details
Premium amount and payment details

Insurant Details
Personal information of insured

Nominations
Nominee and appointee details

Existing Policy Details
Existing policies of the insured

Base Coverage
Coverage amount and term

Medical Information
Health and medical history

Bank Details
Bank account details

Documents
Verify proposal documents

Submit to Quality Check
Review and submit application

Documents
Verify proposal documents

Search...

S.No.	Document Name	Priority	Status	Action	Files (Latest to Oldest)
1	PROPOSAL_FORM	Mandatory	Pending	<div>Receipt PLI-2026-00001130_2026-09-29.pdf 4.67 KB</div> <div>PDF only · max 500 KB</div> <div>Browse</div>	
2	AGE_PROOF	Mandatory	Pending	<div>policy-acceptance-letter-document.pdf 73.66 KB</div> <div>PDF only · max 500 KB</div> <div>Browse</div>	
3	ADDRESS_PROOF	Mandatory	Pending	<div>premium-receipt-book-document.pdf 72.36 KB</div> <div>PDF only · max 500 KB</div> <div>Browse</div>	
4	MEDICAL_REPORT	Mandatory	Pending	<div>100000152.pdf 297.66 KB</div> <div>PDF only · max 500 KB</div> <div>Browse</div>	
5	ID_PROOF	Mandatory	Pending	<div>Baq Label EBX0002358562.pdf 32.08 KB</div> <div>PDF only · max 500 KB</div> <div>Browse</div>	
6	INCOME_PROOF	Mandatory	Pending	<div>Baq Label IBX0000082895.pdf 32.32 KB</div> <div>PDF only · max 500 KB</div> <div>Browse</div>	
7	RPLI_ELIGIBILITY_TYPE_PROOF	Optional		<div>No file chosen</div> <div>PDF only · max 500 KB</div> <div>Browse</div>	

Back

Upload mandatory Documents

Click on Upload

Click on Save & Continue

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VI

HomeIMS CLAIMSPLI Agent ManagementPLI Policy IssuePOLICY MANAGEMENT

Post Payments Bank - Your trusted banking partner

Proposals > Proposal #PLI-2026-00001130 > Data Entry

New Business Data Entry

Step 10 of 10

PROPOSAL ID PLI-2026-00001130	PROPOSER NAME VISHWESH PATHAK	PRODUCT TYPE PLI-EA/60yrs - Santosh	SUM ASSURED ₹ 300000	PREMIUM ₹ 1485	FREQUENCY MONTHLY	CUSTOMER ID 96830896	STATUS DATA_ENTRY	CHANNEL PO	ENTRY PATH WITHOUT_EKYC
----------------------------------	----------------------------------	--	-------------------------	-------------------	----------------------	-------------------------	----------------------	---------------	----------------------------

STEPS
10 of 10

Agent Details
Agent information and correspondence

First Premium Details
Premium amount and payment details

Insurant Details
Personal information of insured

Nominations
Nominee and appointee details

Existing Policy Details
Existing policies of the insured

Base Coverage
Coverage amount and term

Medical Information
Health and medical history

Bank Details
Bank account details

Documents
Verify proposal documents

10 Submit to Quality Check
Review and submit application

Submit to Quality Check
Review and submit application

1. I have checked that the insurant has signed on the Proposal Form

2. I have checked that the medical examiner has signed the medical reports and the proposal form

3. I have verified that the data given on the proposal form matches all the uploaded data

☒ I have read and agree to the declaration above

Decision *

☒ Submit to QC

☐ Return for correction

☐ Missing Documents

Comments

Forwarded for approval

Back

Submit

Select the Check box
&
Select Redo button of
Submit to QC

Click on Submit

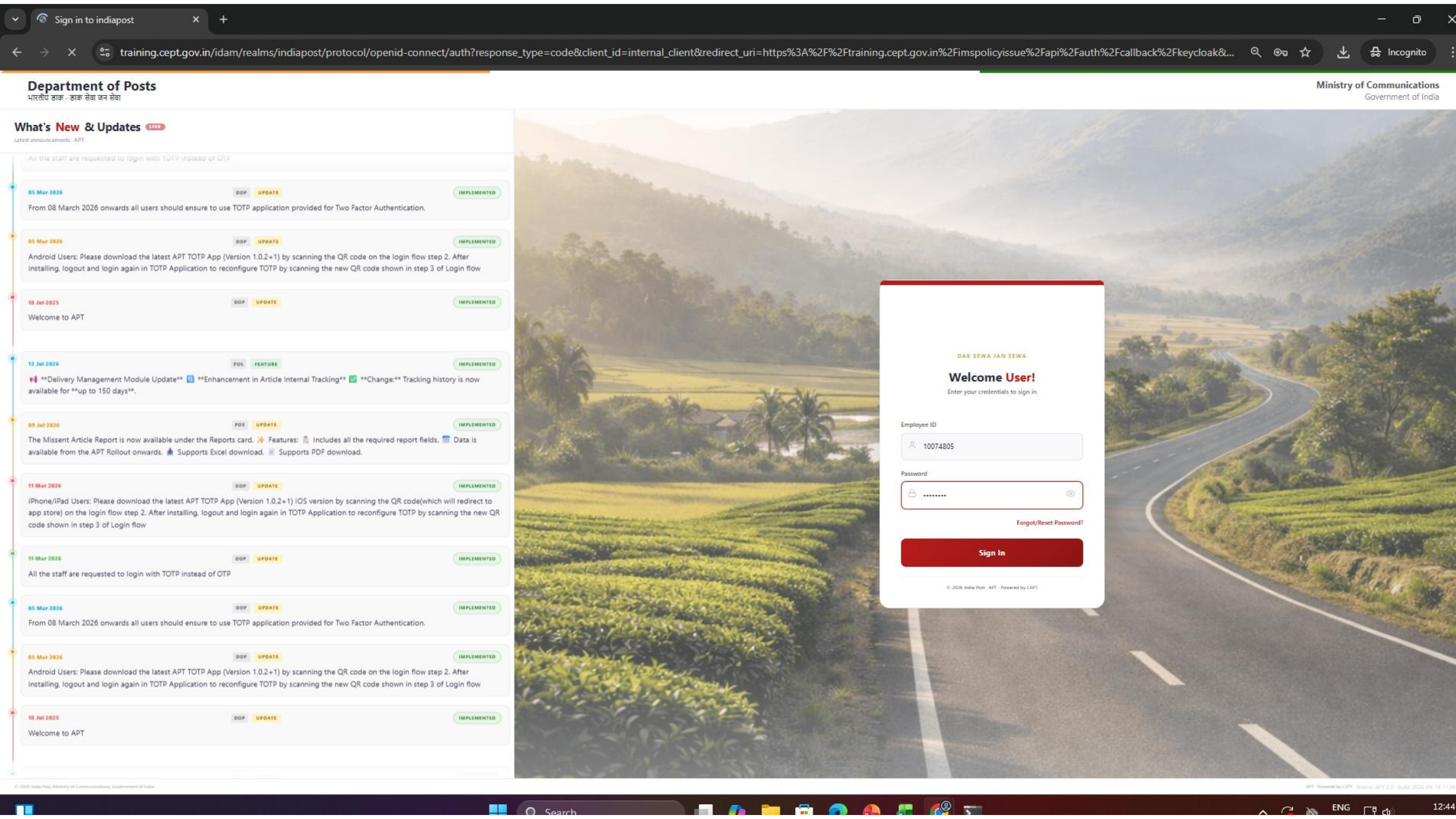
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Quality Checker (CPC SUPER)



What's New & Updates LIVE
Latest announcements - APT

- All the staff are requested to login with TOTP instead of OTP
- 05 Mar 2026

DDP UPDATE

IMPLEMENTED

From 08 March 2026 onwards all users should ensure to use TOTP application provided for Two Factor Authentication.
- 05 Mar 2026

DDP UPDATE

IMPLEMENTED

Android Users: Please download the latest APT TOTP App (Version 1.0.2+1) by scanning the QR code on the login flow step 2. After installing, logout and login again in TOTP Application to reconfigure TOTP by scanning the new QR code shown in step 3 of Login flow
- 18 Jul 2025

DDP UPDATE

IMPLEMENTED

Welcome to APT
- 13 Jul 2026

POS FEATURE

IMPLEMENTED

🔊

Delivery Management Module Update

📄

Enhancement in Article Internal Tracking

✅

Change: Tracking history is now available for **up to 150 days**.
- 09 Jul 2026

POS UPDATE

IMPLEMENTED

The Missent Article Report is now available under the Reports card. 🌟 Features: 📄 Includes all the required report fields. 📄 Data is available from the APT Rollout onwards. 🔥 Supports Excel download. 📄 Supports PDF download.
- 11 Mar 2026

DDP UPDATE

IMPLEMENTED

iPhone/iPad Users: Please download the latest APT TOTP App (Version 1.0.2+1) IOS version by scanning the QR code(which will redirect to app store) on the login flow step 2. After installing, logout and login again in TOTP Application to reconfigure TOTP by scanning the new QR code shown in step 3 of Login flow
- 11 Mar 2026

DDP UPDATE

IMPLEMENTED

All the staff are requested to login with TOTP instead of OTP
- 05 Mar 2026

DDP UPDATE

IMPLEMENTED

From 08 March 2026 onwards all users should ensure to use TOTP application provided for Two Factor Authentication.
- 05 Mar 2026

DDP UPDATE

IMPLEMENTED

Android Users: Please download the latest APT TOTP App (Version 1.0.2+1) by scanning the QR code on the login flow step 2. After installing, logout and login again in TOTP Application to reconfigure TOTP by scanning the new QR code shown in step 3 of Login flow
- 18 Jul 2025

DDP UPDATE

IMPLEMENTED

Welcome to APT

DAK SEWA JAN SEWA

Welcome User!
Enter your credentials to sign in

Employee ID

10074805

Password

Forgot/Reset Password?

Sign In

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Claims
Claims processing & appeals

 **Track Claim**
claim status and history



Agent Management



Agent Incentive Management



PLI Employer Management



New Business Quotes


Reports

Upload Policy Docs


[Print Policy Documents](#)

Bond Dispatch


[Track Proposal/Policy](#)

Error loading news: HTTP error! status: 500

Favourites (Ctrl+F)

Inbox

View and manage proposals assigned to you
v1.1.3

Policy Issues

Proposal Number

Start Date

End Date

Status / Stage

e.g. PLI-2026-00006728

dd-mm-yyyy

dd-mm-yyyy

Select status

Proposals (1)

Search proposal, proposer or status.

Proposal Number	Proposer Name	Plan	Sum Assured	Channel	Submitted Date	Status
PLI-2026-00001130	VISHWESH PATHAK	PLI/EA-60 (SANTOSH)	₹ 3,00,000	IMSCPC	2026-09-29 12:43:26	Q.C. PENDING

Showing 1-1 of 1 Rows per page: 10

< Page 1 of 1 > >>

Click on Qc_Indexing

Quality Check

training.cept.gov.in/imspolicyissue/proposal/1130/quality-check

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PLI Policy Issue

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Proposals > Proposal #PLI-2026-00001130 > Quality Check

New Business Quality Check

Step 1 of 10

PROPOSAL ID PLI-2026-00001130	PROPOSER NAME VISHWESH PATHAK	PRODUCT TYPE PLI-EA/60yrs - Santosh	SUM ASSURED ₹ 300000	PREMIUM ₹ 1485	FREQUENCY MONTHLY	CUSTOMER ID 96830896	STATUS QC_PENDING	CHANNEL PO	ENTRY PATH WITHOUT_EKYC
----------------------------------	----------------------------------	--	-------------------------	-------------------	----------------------	-------------------------	----------------------	---------------	----------------------------

STEPS
1 of 10

Agent Details
Agent information and correspondence

First Premium Details
Premium amount and payment details

Insurant Details
Personal information of insured

Nominations
Nominee and appointee details

Existing Policy Details
Existing policies of the insured

Base Coverage
Coverage amount and term

Medical Information
Health and medical history

8 Bank Details
Bank account details

Documents
Verify proposal documents

10 Submit QC Decision
Record the quality-check decision

Agent Details
Agent information and correspondence

Agent Availability

☐ Is Agent Available

Back

Next

If available Agent click on Check Box

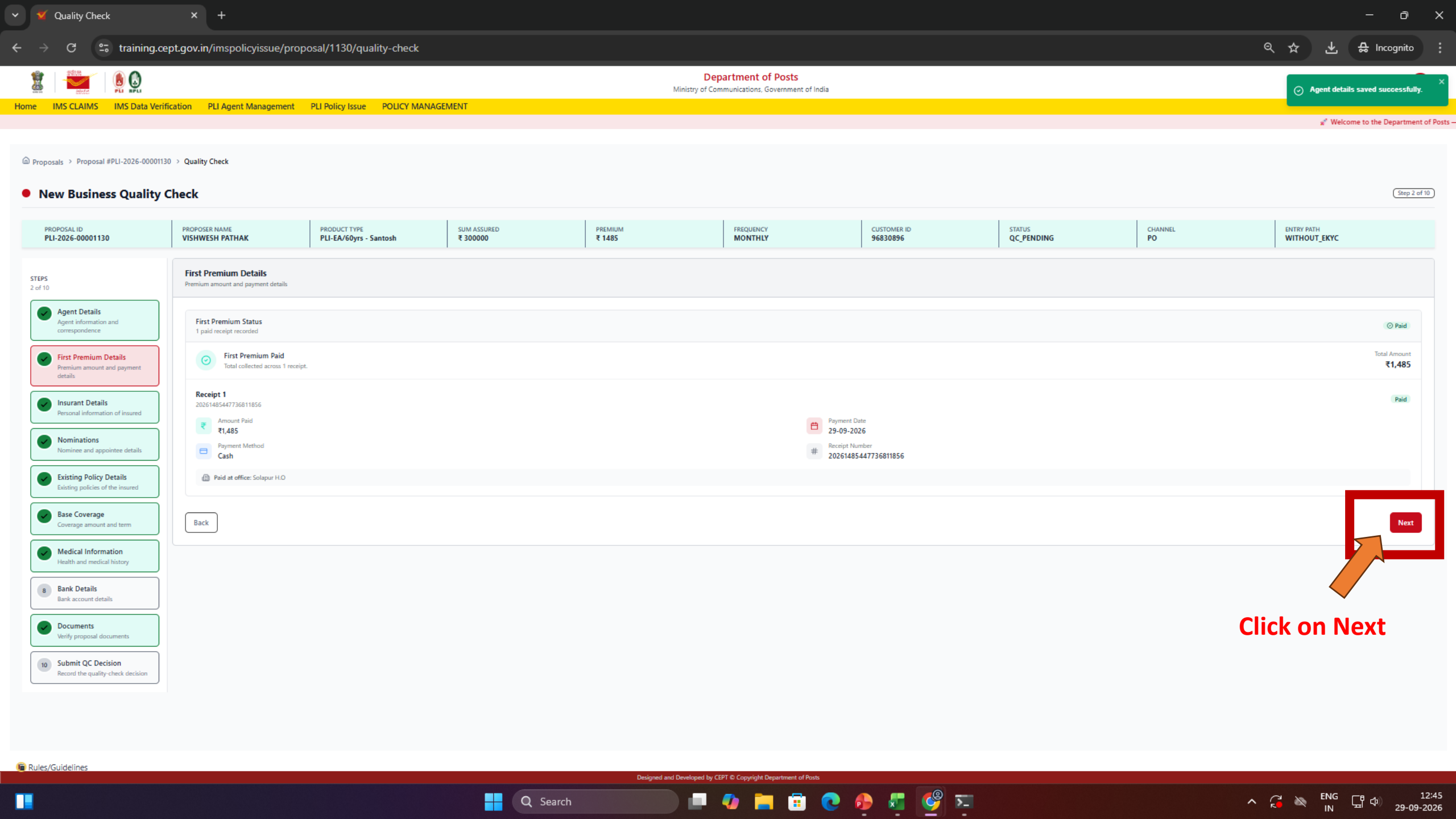
Click on Next

Rules/Guidelines

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12:45

28-08-2026



Quality Check

training.cept.gov.in/impolicyissue/proposal/1130/quality-check

Incognito

PROPOSAL ID
PLI-2026-00001130

PROPOSER NAME
VISHWESH PATHAK

PRODUCT TYPE
PLI-EA/60yrs - Santosh

SUM ASSURED
₹ 300000

PREMIUM
₹ 1485

FREQUENCY
MONTHLY

CUSTOMER ID
96830896

STATUS
QC_PENDING

CHANNEL
PO

ENTRY PATH
WITHOUT_EKYC

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413601

Q

COMMUNICATION ADDRESS

☐ Same as permanent address

Address Line 1 *
ARYA CHOWK TULJAPUR

Address Line 2
Enter address line 2

Address Line 3
Enter address line 3

Village
Enter village

Mandal
Enter mandal

City *
TULJAPUR

District
DHARASHIV

State *
Maharashtra

Country
INDIA

Pincode *
413601

Q

Edit

Contact Details

Mobile Number *
9822825206

Email Address *
P.VISH18@GMAIL.COM

Edit

Employment Details (Enter Parent's Details in case of Child Policy)

Occupation *
Central Government

PAO / DDO Code
Enter PAO / DDO code

Organization
Enter organization

Designation
Enter designation

Date of Entry
DD/MM/YYYY

Superior's Designation
Enter superior's designation

PAN Number
AQ8PP9717A

Annual Income *
₹ 10,00,000

Qualification *
Graduate

Back

Next

Click on Next

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Quality Check

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PROPOSAL ID

PROPOSER NAME

PRODUCT TYPE

SUM ASSURED

PREMIUM

FREQUENCY

CUSTOMER ID

STATUS

CHANNEL

ENTRY PATH

PLI-2026-00001130

VISHWESH PATHAK

PLI-EA/60yrs - Santosh

₹ 300000

₹ 1485

MONTHLY

96830896

QC_PENDING

PO

WITHOUT_EKYC

STEPS

4 of 10

Agent Details

Agent information and correspondence

First Premium Details

Premium amount and payment details

Insurant Details

Personal information of insured

Nominations

Nominee and appointee details

Existing Policy Details

Existing policies of the insured

Base Coverage

Coverage amount and term

Medical Information

Health and medical history

8 Bank Details

Bank account details

Documents

Verify proposal documents

10 Submit QC Decision

Record the quality-check decision

Nominations

Nominee and appointee details

Total Share Allocated100% / 100%

Nominee #1

Search ByCustomer Search

Search By

Enter search value

Create Customer

Reset

Salutation

Mrs.

First Name

SUPRIYA

Middle Name

Enter middle name

Last Name

PATHAK

Gender

Female

Date of Birth

11/03/1990

Relationship

Spouse

Share %

100

Phone

9823825206

Email

name@example.com

NOMINEE ADDRESS

Address Line 1

ARYA CHOWK TULJAPUR

Address Line 2

Enter address line 2

Village

Enter village

Mandal

Enter mandal

District

DHARASHIV

City

TULJAPUR

State

Maharashtra

Pincode

413601

Copy address from proposer

Back

Click on Next

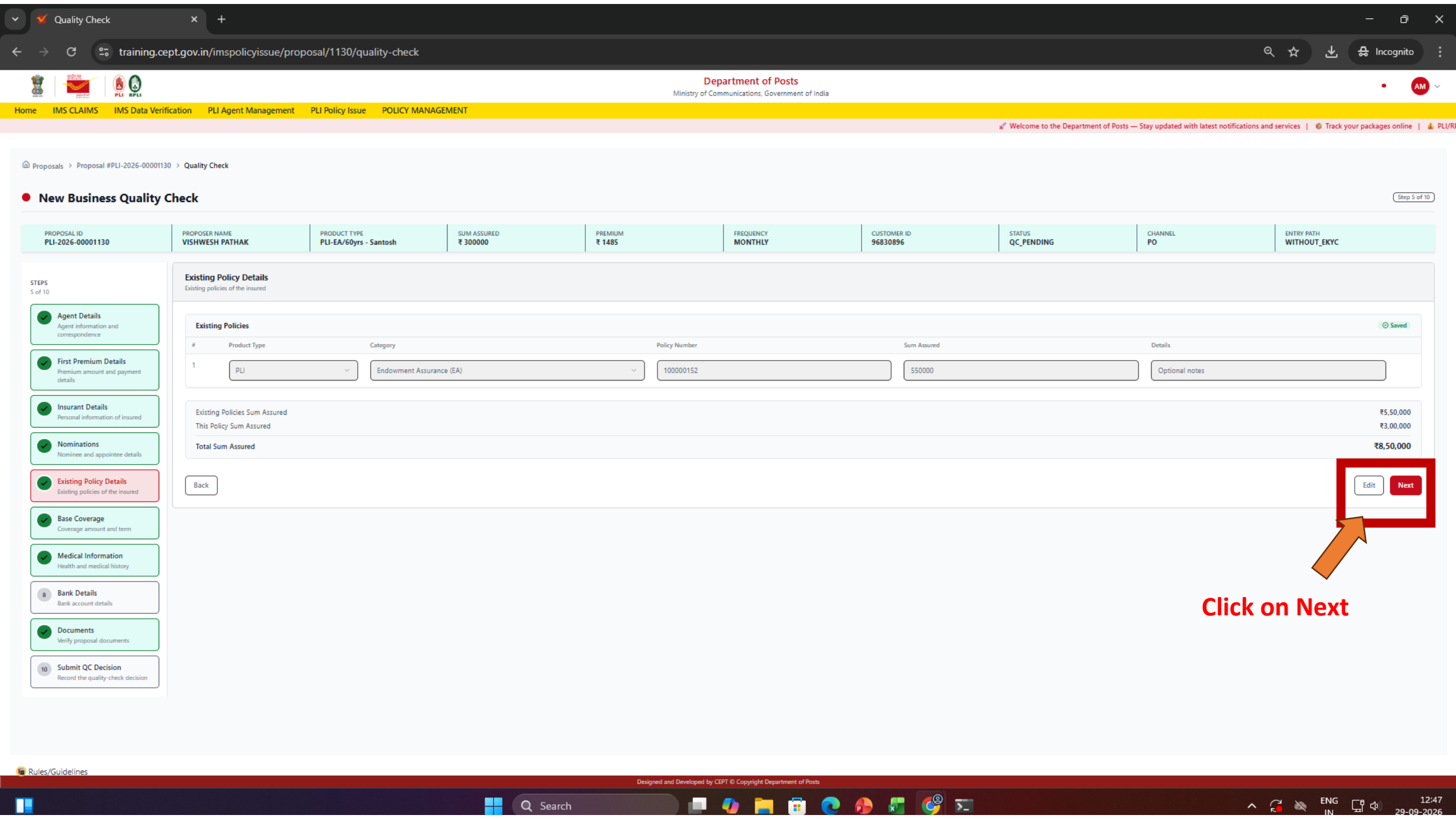
EditNext

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12:47

29-09-2026



Proposals > Proposal #PLI-2026-00001130 > Quality Check

New Business Quality Check

Step 5 of 10

PROPOSAL ID PLI-2026-00001130	PROPOSER NAME VISHWESH PATHAK	PRODUCT TYPE PLI-EA/60yrs - Santosh	SUM ASSURED ₹ 300000	PREMIUM ₹ 1485	FREQUENCY MONTHLY	CUSTOMER ID 96830896	STATUS QC_PENDING	CHANNEL PO	ENTRY PATH WITHOUT_EKYC
----------------------------------	----------------------------------	--	-------------------------	-------------------	----------------------	-------------------------	----------------------	---------------	----------------------------

STEPS
5 of 10

- Agent Details
Agent information and correspondence
- First Premium Details
Premium amount and payment details
- Insurant Details
Personal information of insured
- Nominations
Nominee and appointee details
- Existing Policy Details
Existing policies of the insured
- Base Coverage
Coverage amount and term
- Medical Information
Health and medical history
- Bank Details
Bank account details
- Documents
Verify proposal documents
- Submit QC Decision
Record the quality-check decision

Existing Policy Details

Existing policies of the insured

Existing Policies

Saved

#	Product Type	Category	Policy Number	Sum Assured	Details
1	PLI	Endowment Assurance (EA)	100000152	₹50000	Optional notes

Existing Policies Sum Assured

₹5,50,000

This Policy Sum Assured

₹3,00,000

Total Sum Assured

₹8,50,000

Back

Edit

Next

Click on Next

New Business Quality Check

Step 6 of 10

PROPOSAL ID PLI-2026-00001130	PROPOSER NAME VISHWESH PATHAK	PRODUCT TYPE PLI-EA/60yrs - Santosh	SUM ASSURED ₹ 300000	PREMIUM ₹ 1485	FREQUENCY MONTHLY	CUSTOMER ID 96830896	STATUS QC_PENDING	CHANNEL PO	ENTRY PATH WITHOUT_EKYC
----------------------------------	----------------------------------	--	-------------------------	-------------------	----------------------	-------------------------	----------------------	---------------	----------------------------

STEPS

6 of 10

Agent Details

Agent information and correspondence

First Premium Details

Premium amount and payment details

Insurant Details

Personal information of insured

Nominations

Nominee and appointee details

Existing Policy Details

Existing policies of the insured

Base Coverage

Coverage amount and term

Base Coverage

Coverage amount and term

Policy Coverage

Sum Assured *

₹ 3,00,000

Premium Ceasing Age / Term *

60

Premium Frequency *

Monthly

Subsequent Premium Payment Mode *

CASH

Cumulative Sum Assured

₹8,50,000

Base Premium

₹1,485

GST Amount

₹0

Total Premium

₹1,485

Short Excess Premium

₹0

Derived — not editable.

Back

Edit

Next

Click on Next

Quality Check

training.cept.gov.in/imspolicyissue/proposal/1130/quality-check

PROPOSAL ID
PLI-2026-00001130

PROPOSER NAME
VISHWESH PATHAK

PRODUCT TYPE
PLI-EA/60yrs - Santosh

SUM ASSURED
₹ 300000

PREMIUM
₹ 1485

FREQUENCY
MONTHLY

CUSTOMER ID
96830896

STATUS
QC_PENDING

CHANNEL
PO

ENTRY PATH
WITHOUT_EKYC

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Coverage amount and term

Medical Information
Health and medical history

Bank Details
Bank account details

Documents
Verify proposal documents

Submit QC Decision
Record the quality-check decision

☐ Kidney disease prostrate, hydrocele and urinary system

☐ Any disease of brain, depression, mental/psychiatric ailment, multiple sclerosis, stroke, nervous system, stroke, parkinsonism

☐ HIV Positive/AIDS or any other sexually transmitted diseases

☐ Hepatitis-B or C or A

☐ Epilepsy

☐ Nervous disorder, Gastritis, Stomach or duodenal Ulcer, Hernia

☐ Symptoms/ailment relating to liver or reproductive system

☐ Leprosy

☐ Any physical deformity or handicap

☐ Any other serious disease

Family Doctor Name
If any

☐ Family hereditary condition

☐ Have you availed any kind of leave on medical ground or hospitalized during the last 3 years?

☐ Has physical deformity

Edit

Medical Examiner

Examiner Profile Code
HP-PLI-101
Verify
Verified

Enter the doctor's examiner code and click Verify to auto-fill the examiner details.

Examiner Name
DR DEEPTI RANA MO PHC DHAMETA DEEPTI RANA MO PHC DHAMETA

Examiner's Medical Status
Approved

Examination Date
29/09/2026

Medical Examiner Remarks
Approved

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Click on Next

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29-09-2026

New Business Quality Check

Step 8 of 10

PROPOSAL ID PLI-2026-00001130	PROPOSER NAME VISHWESH PATHAK	PRODUCT TYPE PLI-EA/60yrs - Santosh	SUM ASSURED ₹ 300000	PREMIUM ₹ 1485	FREQUENCY MONTHLY	CUSTOMER ID 96830896	STATUS QC_PENDING	CHANNEL PO	ENTRY PATH WITHOUT_EKYC
----------------------------------	----------------------------------	--	-------------------------	-------------------	----------------------	-------------------------	----------------------	---------------	----------------------------

STEPS

8 of 10

Agent Details

Agent information and correspondence

First Premium Details

Premium amount and payment details

Insurant Details

Personal information of insured

Bank Details

Bank account details

Bank Accounts

Saved

#	Account Number	IFSC	Bank	Type	Branch	Active	Primary
1	<input type="text" value="33259461882"/>	<input type="text" value="SBIN0000325"/>	<input type="text" value="Barshi"/>	<input type="text" value="SAVINGS"/>	<input type="text" value="Solapur"/>	☒	☒

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Edit

Next

The diagram illustrates a five-step process flow. The steps are listed vertically in a column on the left side of the slide. Each step is represented by a rounded rectangle containing a circular icon and text. The first four steps are in green boxes with a green checkmark icon, indicating they are completed. The fifth step, 'Bank Details', is in a red box with a red circle icon, indicating it is the current step. A red arrow points from the text 'Click on Next' to the right side of the flowchart.

- Nominations**
Nominee and appointee details
- Existing Policy Details**
Existing policies of the insured
- Base Coverage**
Coverage amount and term
- Medical Information**
Health and medical history
- Bank Details**
Bank account details

Click on Next

Click on Next

Quality Check

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Proposals > Proposal #PLI-2026-00001130 > Quality Check

New Business Quality Check

Step 9 of 10

STEPS

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Agent Details

Agent information and correspondence

First Premium Details

Premium amount and payment details

Insurant Details

Personal information of insured

Nominations

Nominee and appointee details

Existing Policy Details

Existing policies of the insured

Base Coverage

Coverage amount and term

Medical Information

Health and medical history

Bank Details

Bank account details

Documents

Verify proposal documents

Submit QC Decision

Record the quality-check decision

Documents

Verify proposal documents

Search...

S.No.	Document Name	Priority	Status	Action	Files (Latest to Oldest)
1	PROPOSAL_FORM	Mandatory	Uploaded	<div>No file chosen</div> <div>Browse</div>	File_v1.pdf
2	AGE_PROOF	Mandatory	Uploaded	<div>No file chosen</div> <div>Browse</div>	File_v1.pdf
3	ADDRESS_PROOF	Mandatory	Uploaded	<div>No file chosen</div> <div>Browse</div>	File_v1.pdf
4	MEDICAL_REPORT	Mandatory	Uploaded	<div>No file chosen</div> <div>Browse</div>	File_v1.pdf
5	ID_PROOF	Mandatory	Uploaded	<div>No file chosen</div> <div>Browse</div>	File_v1.pdf
6	INCOME_PROOF	Mandatory	Uploaded	<div>No file chosen</div> <div>Browse</div>	File_v1.pdf
7	RPLI_ELIGIBILITY_TYPE_PROOF	Optional		<div>No file chosen</div> <div>Browse</div>	

Back

Upload

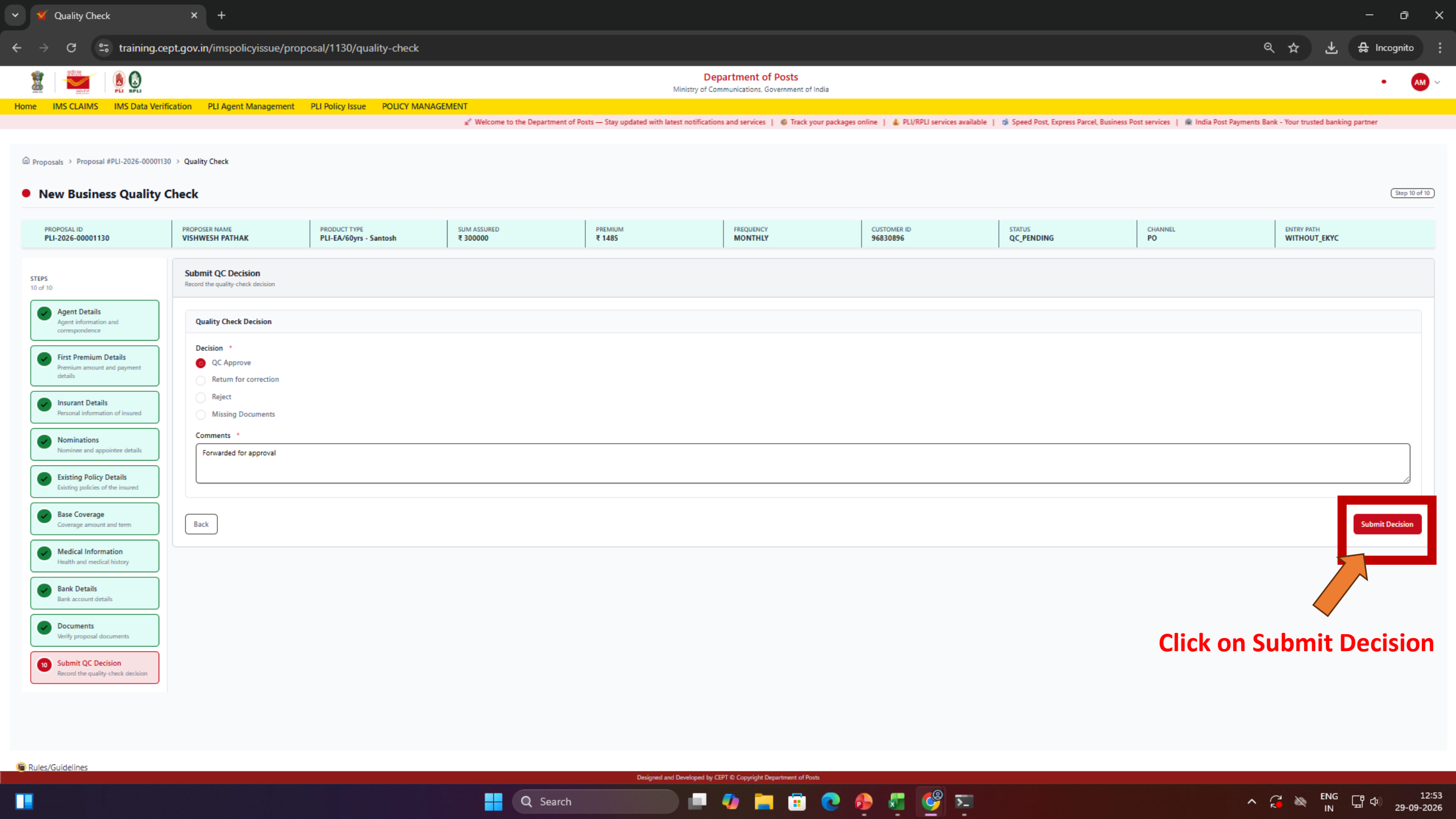
Reset

Next

Click on Next

12:53

29-09-2026



Proposals > Proposal #PLI-2026-00001130 > Quality Check

New Business Quality Check

Step 10 of 10

PROPOSAL ID PLI-2026-00001130	PROPOSER NAME VISHWESH PATHAK	PRODUCT TYPE PLI-EA/60yrs - Santosh	SUM ASSURED ₹ 300000	PREMIUM ₹ 1485	FREQUENCY MONTHLY	CUSTOMER ID 96830896	STATUS QC_PENDING	CHANNEL PO	ENTRY PATH WITHOUT_EKYC
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- STEPS
10 of 10
- Agent Details
Agent information and correspondence

First Premium Details
Premium amount and payment details

Insurant Details
Personal information of insured

Nominations
Nominee and appointee details

Existing Policy Details
Existing policies of the insured

Base Coverage
Coverage amount and term

Medical Information
Health and medical history

Bank Details
Bank account details

Documents
Verify proposal documents

10 Submit QC Decision
Record the quality-check decision

Submit QC Decision

Record the quality-check decision

Quality Check Decision

Decision *

- ☒ QC Approve
- ☐ Return for correction
- ☐ Reject
- ☐ Missing Documents

Comments *

Forwarded for approval

Back

Submit Decision

Click on Submit Decision

Approver (Sr PM)

Policy Issue | Dashboard

training.cept.gov.in/imspolicyissue/dashboard

Incognito



Department of Posts

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SU

HomeBag ManagementBCP SolutionCore Insurance SolutionCustomer RelationshipEFRMOthers

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Dashboard

Select a module to get started


Inbox


New Business Quotes


Reports


Track Proposal/Policy


Create Customer

Click on Inbox

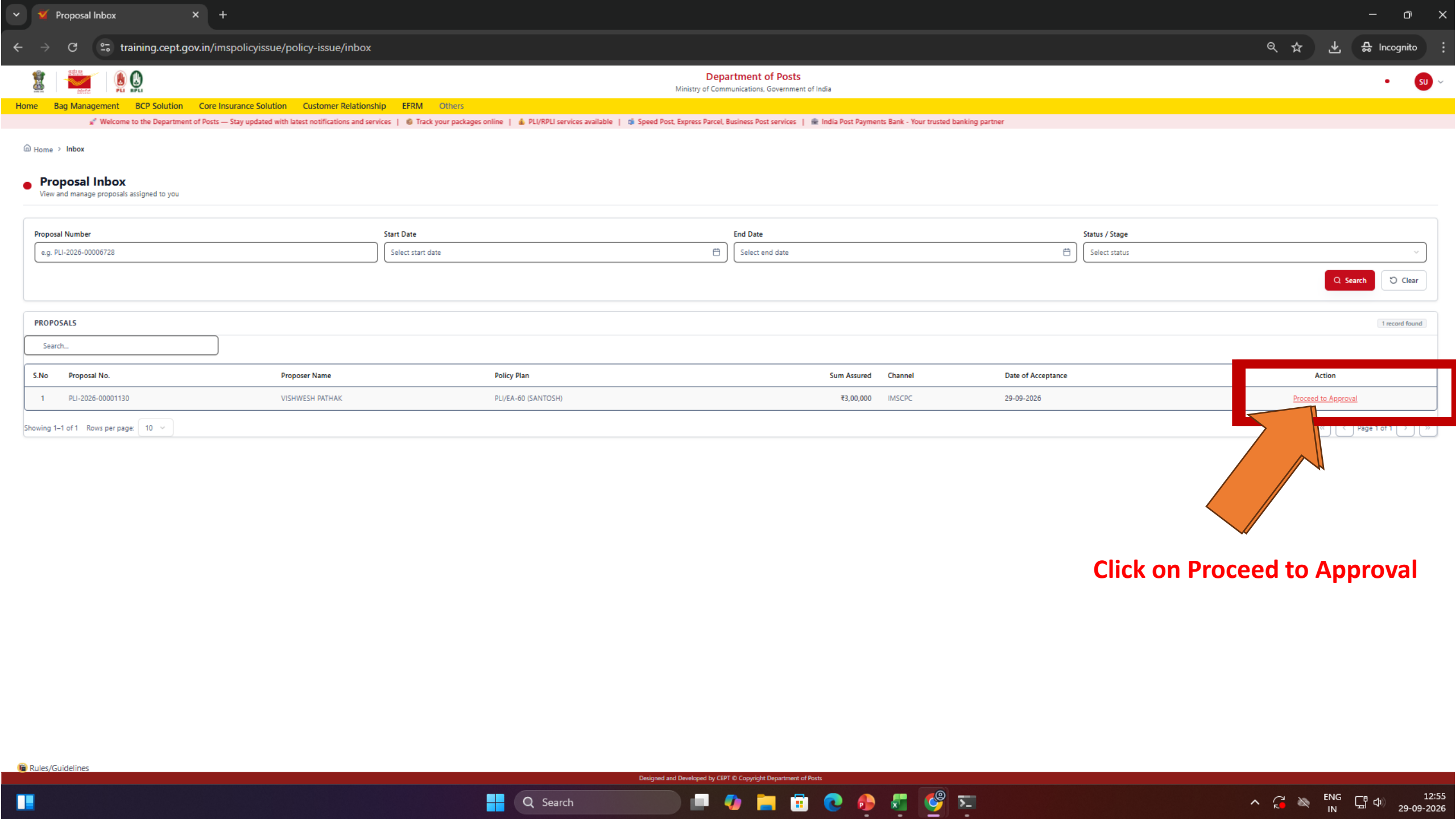
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Search



ENG IN12:5529-09-2026



Home > Inbox

Proposal Inbox

View and manage proposals assigned to you

Proposal Number

e.g. PLI-2026-00006728

Start Date

Select start date

End Date

Select end date

Status / Stage

Select status

Search

Clear

PROPOSALS

1 record found

Search...

S.No	Proposal No.	Proposer Name	Policy Plan	Sum Assured	Channel	Date of Acceptance	Action
1	PLI-2026-00001130	VISHWESH PATHAK	PLI/EA-60 (SANTOSH)	₹3,00,000	IMSCPC	29-09-2026	Proceed to Approval

Showing 1-1 of 1 Rows per page: 10

Page 1 of 1

New Business Approval

PROPOSAL ID
PLI-2026-00001130

PROPOSER NAME
VISHWESH KOTH

STEPS
10 of 10



Agent Details

Agent information and correspondence



First Premium Details

Premium amount and payment details



Insurant Details

Personal information of insured



Nominations

Nominee and appointee details



Existing Policy Details

Existing policies of the insured



Base Coverage

Coverage amount and term



Medical Information

Health and medical history



Bank Details

Bank account details



Documents

Verify proposal documents

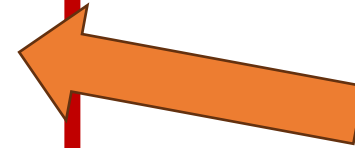


Submit Policy Decision

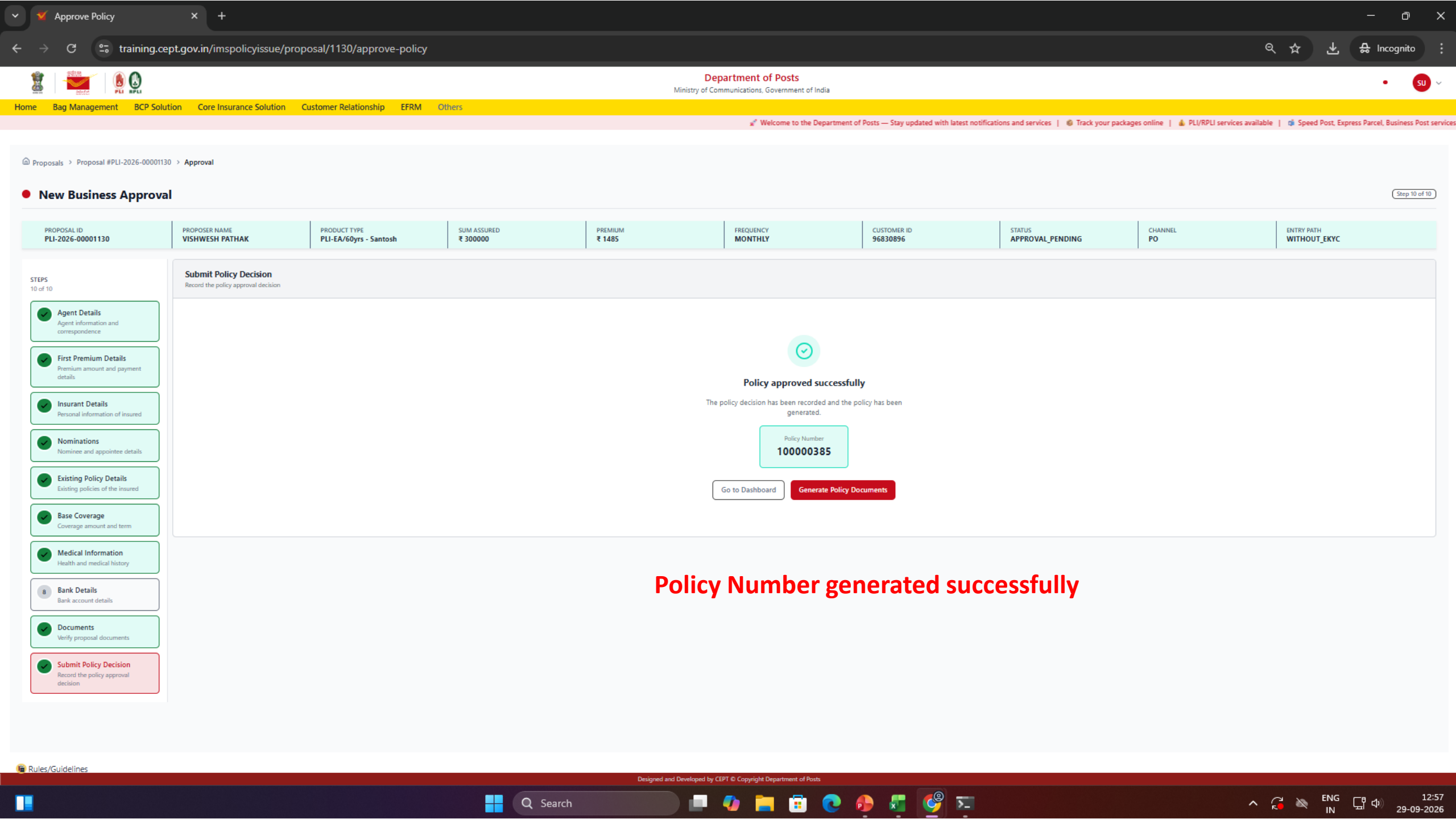
Record the policy approval decision

Submit Policy

Record the policy a



All field checked by Approver & Submit



New Business Approval

Step 10 of 10

PROPOSAL ID PLI-2026-00001130	PROPOSER NAME VISHWESH PATHAK	PRODUCT TYPE PLI-EA/60yrs - Santosh	SUM ASSURED ₹ 300000	PREMIUM ₹ 1485	FREQUENCY MONTHLY	CUSTOMER ID 96830896	STATUS APPROVAL_PENDING	CHANNEL PO	ENTRY PATH WITHOUT_EKYC
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- STEPS
10 of 10
- Agent Details
Agent information and correspondence
 - First Premium Details
Premium amount and payment details
 - Insurant Details
Personal information of insured
 - Nominations
Nominee and appointee details
 - Existing Policy Details
Existing policies of the insured
 - Base Coverage
Coverage amount and term
 - Medical Information
Health and medical history
 - Bank Details
Bank account details
 - Documents
Verify proposal documents
 - Submit Policy Decision
Record the policy approval decision

Submit Policy Decision
Record the policy approval decision

Policy approved successfully

The policy decision has been recorded and the policy has been generated.

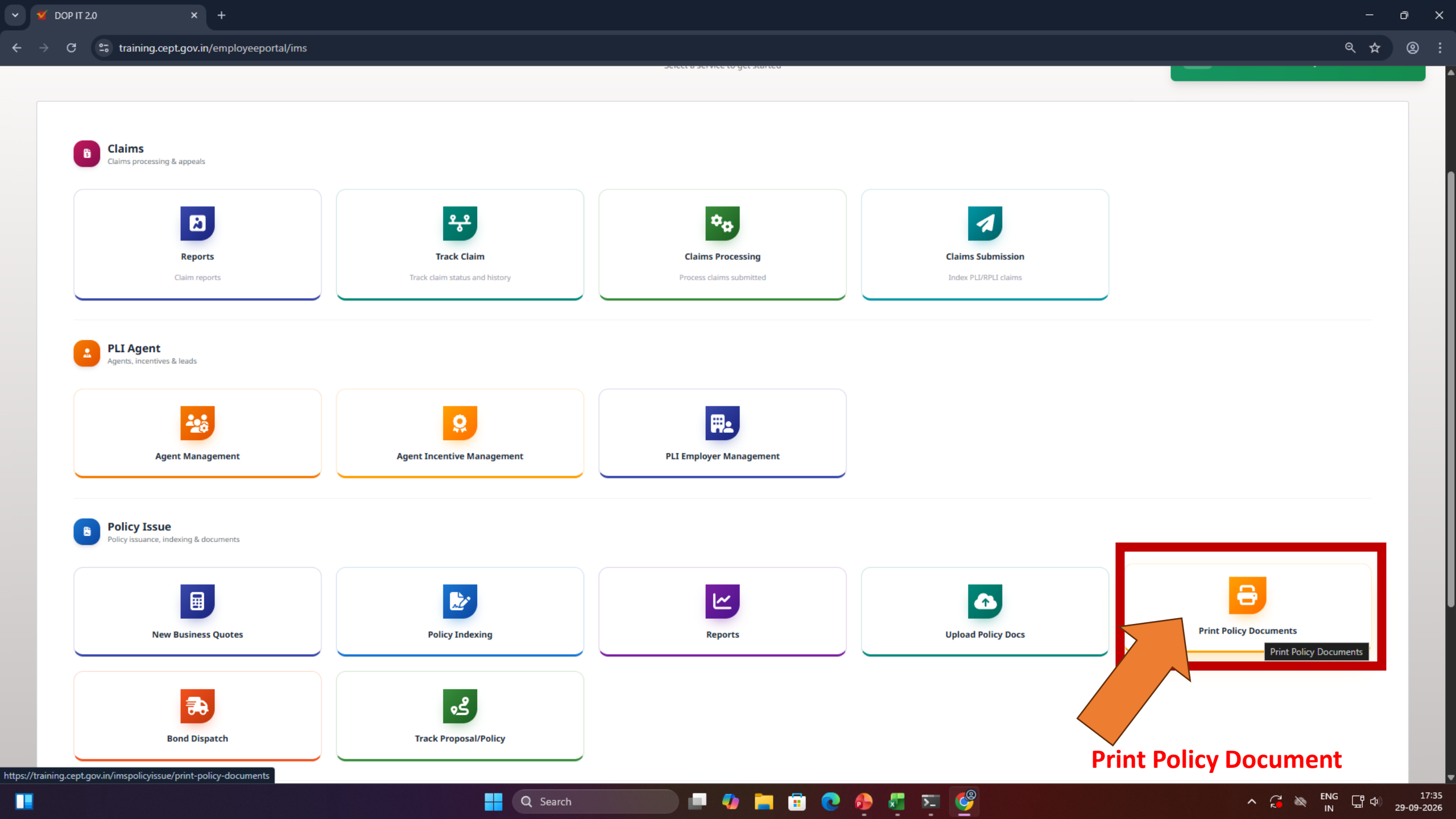
Policy Number
100000385

Go to DashboardGenerate Policy Documents

Policy Number generated successfully

CPC USER

Printing of Bond & Dispatch of bond



Claims

Claims processing & appeals



Reports

Claim reports



Track Claim

Track claim status and history



Claims Processing

Process claims submitted



Claims Submission

Index PLI/RPLI claims

PLI Agent

Agents, incentives & leads



Agent Management



Agent Incentive Management



PLI Employer Management

Policy Issue

Policy issuance, indexing & documents



New Business Quotes



Policy Indexing



Reports



Upload Policy Docs



Bond Dispatch



Track Proposal/Policy



Print Policy Documents

Print Policy Documents

Print Policy Document

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Print Policy Documents

Select a form type and enter the relevant number to search and print or download policy documents.

Proposal Number

Policy Number

Form Type *

Acceptance Letter

Acceptance Letter ✓

Receipt Book

Policy Bond

From (Acceptance Date)

To (Acceptance Date)

Search

Reset

Search...

S.No.	Proposal No.	Policy No.	Insured	Action
1	PLI-2026-00001130	100000385	MR VISHWESH PATHAK	29 Sept 2026

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[Download](#)

Showing 1–1 of 1 Rows per page: 10 ▾

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Select one by one document
for printing

[Home](#) > [Print Policy Documents](#)

Print Policy Documents

Select a form type and enter the relevant number to search and print or download policy documents.

Proposal Number Policy Number

Form Type From (Acceptance Date) To (Acceptance Date)

S.No.	Proposal No.	Policy No.	Insured	Action
1	PLI-2026-00001130	100000385	MR VISHWESH PATHAK	29 Sept 2026

Showing 1–1 of 1

Rows per page: 10

Page 1 of 1

Select one by one document for printing

**Print & Download option
available here**



डाक जीवन बीमा
Patal Life Insurance



WHEREAS the proposer named as the "Insured" in the Schedule printed below has deposited with the PRESIDENT OF INDIA a proposal and declaration for an Endowment Assurance on his/her own life mentioned in the said Schedule and has agreed that the said proposal and declaration signed by him/her shall be the basis of the contract for such insurance.

AND WHEREAS THE PRESIDENT OF INDIA has accepted the said proposal and has received the first premium paid by the proposer in terms of the letter of acceptance for and insurance of the amount and on the terms stated in the said Schedule.

NOW IT IS HEREBY DECLARED that if the insured shall pay to the Director General of Posts or the Officer for the time being performing his functions or any other officer duly authorised by the PRESIDENT OF INDIA in this behalf, the subsequent periodical premia within the prescribed time limit of such payment as stipulated for in the said Schedule or until his/her death, whichever shall first occur, the PRESIDENT OF INDIA shall be subject and liable to pay the sum mentioned in the said Schedule together with bonus, if any, declared by the PRESIDENT OF INDIA to the insured or his/her assigns as early as possible after the insured has attained the age specified if he/she shall die without receiving payment, unto the Executors, Administrator or Assigns of the insured as early as possible after proof of death of the insured and title of the claimant, to the satisfaction of the Director General of Posts or the Officer for the time being performing his function or any other Officer duly authorised by the PRESIDENT OF INDIA in this behalf as aforesaid.

BUT this contract is made subject to the terms of Contract printed overleaf.

AND it is also hereby declared the every endorsement placed on the policy by the Director General Posts or the Officer for the time being performing his functions or any other officer duly authorised by the PRESIDENT OF INDIA in that behalf, shall be deemed part of the policy.

AGE has been admitted as the "age" hereof mentioned in the said Schedule.

SCHEDULE			
DATE OF COMMENCEMENT OF RISK	POLICY No.	SUM ASSURED	TERM
29/09/2026	100000385	Rs.300000/-	EA/60
NAME, OCCUPATION AND ADDRESS OF INSURED MR VISHWESH PATHAK ARYA CHOWK TULJAPUR TULJAPUR, MAHARASHTRA - 413601	Date of Birth of Insured	18/06/1984	Date of Maturity
			29/09/2043
	Date of Proposal	29/09/2026	Details of Premium Payable
			1485.00
	Date of Declaration	29/09/2026	Mode of Payment
			Cash
	Date of Acceptance	29/09/2026	Amount*
			Rs.1485/- (MONTHLY)
	Age at Entry	43	Last Premium Due
			01/08/2043

Period during which premia will be Payable:

Till the stipulated date of last payment or prior death of the life assured which ever is earlier.

Event or events on the happening of which the sum assured is to become payable:

On survival of Life Assured to the stipulated date of maturity or at death if earlier.

Beneficiary to receive proceeds under this policy:

The assured or his/her assignee or nominee(s) under section 39 of the Insurance Act 1938 or Proving Executors or Administrators or other Legal Representatives who should take out representation to Insured's Estate or limited to the moneys payable under this policy from any court of any State or Territory of the Union of India.

NOMINATION (under section 39 of the Insurance Act 1938)

Name(s) of Nominee(s)	Age	Relationship
MRS SUPRIYA PATHAK	36	SPOUSE

Policy Bond



Policy No.: 100000385



100000385

Policy Type	Sum Assured	Premium Amount
EA-60	3,00,000/-	1,485/-*
Date of Proposal	Date of Acceptance	Age at Entry
29 Sept 2026	29 Sept 2026	43 Years
Premium Frequency	Last Installment	Date of Maturity
Monthly	01 Aug 2043	29 Sept 2043

*GST rate as applicable for first and renewal years will be charged extra as per Govt. of India orders.

Name of Insurant : Shri. Vishwesh Pathak
Date of Birth of Insurant : 18 Jun 1984
Name of Spouse (In YS) : NA
Date of Birth of Spouse : —
Address of Insurant : 9822825206
ARYA CHOWK TULJAPUR
TULJAPUR
DHARASHIV, MAHARASHTRA
413601

Date : 29 Sept 2026
Place : Solapur H.O

Manager
Central Processing Centre
Solapur H.O

Premium Book



**DEPARTMENT OF POSTS
POSTAL LIFE INSURANCE**

Solapur H.O

Letter No. 100000385

Dated: 29 Sept 2026

Shri. Vishwesh Pathak
9822825206
ARYA CHOWK TULJAPUR
TULJAPUR
DHARASHIV, MAHARASHTRA
413601

Acceptance Letter

Sub: Acceptance letter of your proposal.

RE: Policy Number: 100000385
Insured Name: Vishwesh Pathak

Dear Shri. Vishwesh Pathak,

We are happy to inform that your proposal dated 29 Sept 2026 for Postal Life Insurance has been accepted on 29 Sept 2026. With this, the risk of your life has been under written with effect from 29 Sept 2026. The money paid by you on 29 Sept 2026 has been adjusted as your first premium.

Policy No	Policy Type	Sum assured (in)	Maturity term in yrs	Premium (In)	Date of Birth
100000385	EA-60	300000.00	60	1485.00	18 Jun 1984

*GST rates as applicable for first & renewal years will be charged extra, as per the orders of Government of India issued from time-to-time.

PLI premium should be paid on or before last working day of every month or as per the premium due date.

In case the policy bond is not received by you within a period of 15 days from the date of acceptance of the proposal, you are requested to contact the nearest office at the earliest.

Thank you for choosing Postal Life Insurance for your life insurance needs. If you have any queries pertaining to your life insurance coverage, please contact your Agent or nearest Post Office or our customer service center at 1-800-180-5232/155232. You may contact from Monday to Saturday between 10:30 AM to 4:30 PM.

Sincerely,
Manager,
Solapur H.O

Enclosure :

1. First premium Receipt
2. Premium receipt book
3. Original policy bond

Bond Dispatch

Select a service to get started

Claims

Claims processing & appeals



Reports

Claim reports



Track Claim

Track claim status and history



Claims Processing

Process claims submitted



Claims Submission

Index PLI/RPLI claims

PLI Agent

Agents, incentives & leads



Agent Management



Agent Incentive Management



PLI Employer Management

Policy Issue

Policy issuance, indexing & documents



New Business Quotes



Policy Indexing



Reports



Upload Policy Docs



Print Policy Documents



Bond Dispatch

Bond Dispatch



Track Proposal/Policy

Click on Dispatch

Policy Documents Booking & Dispatch

PLI / RPLI Policy Bond Dispatch Management — Department of Posts

From Date

29/09/2026

To Date

29/09/2026

Article Booking Status

Yet to Book / Not Booked

Policy Number

Enter Policy Number and Press Enter

Fetch

Reset

Bond Booking Records

1 record found

Search...

☐	S.No.	Policy No.	Barcode / Article No	Article Booked Date	Receiver Name	City	Pincode	State / UT	Delivery Instruction	Delivery Slot	Priority
☐	1	100000385	MB000004933IN		VISHWESH PATHAK	TULJAPUR	413601	MAHARASHTRA	ND	02:00-04:00	Priority

Showing 1–1 of 1

Rows per page:

10

<< < Page 1 of 1 > >>

Select the records you want to dispatch. Only selected policies will be updated with their booking article numbers.

Yet to book / Not booked

Policy Documents Booking & Dispatch
PLI / RPLI Policy Bond Dispatch Management — Department of Posts

From Date	To Date	Article Booking Status	Policy Number
<input type="text" value="29/09/2026"/>	<input type="text" value="29/09/2026"/>	<input type="text" value="Yet to Book / Not Booked"/>	<input type="text" value="Enter Policy Number and Press Enter"/>
			<input type="button" value="Fetch"/> <input type="button" value="Reset"/>

Bond Booking Records

1 record found — 1 selected

Search...

☒	S.No.	Policy No.	Barcode / Article No	Article Booked Date	Receiver Name	City	Pincode	State / UT	Delivery Instruction	Delivery Slot	Priority
☒	1	100000385	MB000004933IN		VISHWESH PATHAK	TULJAPUR	413601	MAHARASHTRA	ND	02:00-04:00	Priority

Showing 1 records per page: 10

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1) Select Article

3) Article number & Booking date

2) Book Now

Thank You

Only for Training Purpose

Created By

Vishwesh Pathak

Trainer Solapur Division

Solapur 413001

9822825206