



A. Introduction

This Document explain about process to be followed for the mapping of PLI policy with employee ID and deductions through salary and auto credit Premium in Mccamish.

- Employees can view list of policies added for salary recovery as part of self service.
- The Drawing and Disbursing Officer (DDO) can view the policy mapped for specific employee by entering the EmployeeID or Policy Number.
- Both Employee / DDO can activate or deactivate a policy for salary recovery.
- Both Employee / DDO can remove matured/cash converted policies from the deduction list.
- Both Employee / DDO can add new PLI policies for salary recovery if enabled for pay recovery in Maccamish, with a validation check that the Date of Birth in the Policy and the employee's record must match.
- Both Employee / DDO can fetch and view policy details (Employee ID, Entry/Exit Date, Policy Status) and doesn't include premium amount.
- RPLI is not part of integration and premium amount to be deducted shall be integrated from MccaMish everymonth for the active Policies.

B. Roles Required:

For DDO Team:

- Payroll DDO Approver / Payroll DDO Operator / Payroll DDO Supervisor:
DDO authority of the Employee can View / Add / Remove the PLI Policies for salary recovery.

For Employees

- Payroll Employee Self Service
Employee can View / Add / Remove the PLI Policies for self.

C. Procedure for Managing PLI Policies

C.1. DDO Access and Policy Display

- Navigate to: Payroll service Home->Update /Approve Employee info card-> PLI.

The screenshot displays the Department of Posts web portal. The header includes the Department of Posts logo, the Ministry of Communications, Government of India, and a user profile for PATTABIRAMANI. The main navigation bar contains links for Home, Accounts, Bank Module, Budget Module, Circle Portal CMS, Enterprise Portal CMS, and Others. A red banner indicates an error: "Error loading news: HTTP error! status: 404". The page title is "Postal Life Insurance". The user is logged in as PATTABIRAMANI, Office: CEPT, Designation: Assistant Superintendent Of Posts. The interface shows a "View Policies" button, an "Add Policies" button, and a "View Policy data" button. Below this is a search bar for "Search Employee Policy" with a text input field for "Enter Employee ID" and a "Fetch" button.



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b) Fetch Records: Enter the Employee ID and click on Fetch to display the list of PLI Policies added for salary deduction.

The screenshot shows a user interface for managing PLI policies. At the top, it displays 'Welcome PATTABIRAMAN!' and 'Office : CEPT'. Below this, there are navigation options: 'View Policies', 'Add Policies', and 'View Policy data'. A search bar is present with the text 'Search Employee Policy' and a 'Fetch' button. The search results are summarized in three colored boxes: 11 Total (blue), 8 Active (green), and 3 Inactive (red). Below the summary, there is a table of policies with columns for Policy Number, Start Date, Last Installment Date, and an 'Activate' toggle. The table contains three rows of active policies.

| Policy Number | Policy Start Date | Last Installment Date | Status | Action |
|---------------|-------------------|-----------------------|--------|--------------------------|
| 000003575555 | 04-05-2022 | 04-05-2059 | Active | Activate / Remove Policy |
| 000003575579 | 04-05-2022 | 04-05-2059 | Active | Activate / Remove Policy |
| 000003574913 | 13-11-2020 | 13-11-2070 | Active | Activate / Remove Policy |

C.2. Employee Access and Policy Display

- a) Navigate to: Self Service home -> Employee Payments System -> Miscellaneous request - PLI
- b) List of policies added for the employee will be displayed.

The screenshot shows the Department of Posts website. The header includes the Department of Posts logo and 'Ministry of Communications, Government of India'. Below the header, there is a navigation menu with options like 'Home', 'Accounts', 'Bank Module', 'Budget Module', 'Circle Portal CMS', 'Enterprise Portal CMS', and 'Others'. A red banner displays 'Error loading news: HTTP error! status: 404'. The main content area is titled 'Postal Life Insurance' and shows a user interface similar to the one in the previous screenshot, displaying search results for Employee ID 10049912. The summary shows 11 Total, 7 Active, and 4 Inactive policies. The table below shows two active policies.

| Policy Number | Policy Start Date | Last Installment Date | Status | Action |
|---------------|-------------------|-----------------------|--------|--------------------------|
| 000003575555 | 04-05-2022 | 04-05-2059 | Active | Activate / Remove Policy |
| 000003574913 | 13-11-2020 | 13-11-2070 | Active | Activate / Remove Policy |



C.3. Policy Management Actions (Activate/Deactivate/Remove)

These steps apply to both DDO (after fetching the employee's policies) and the Employee (on their self-service page).

a) In order to “Activate” or “Deactivate” the salary recovery for the policies added, Click on toggle button. A modal will be opened. Select “Yes” or “No” from the modal.

The screenshot shows a list of policies with the following details:

| Policy Number | Status | Policy Start Date | Last Installment Date | Action |
|---------------|----------|-------------------|-----------------------|----------------------------|
| 000003575555 | Active | 04-05-2022 | 04-05-2059 | Activate / Remove Policy |
| 000003575579 | Active | 04-05-2022 | 04-05-2059 | Activate / Remove Policy |
| 000003574913 | Active | 13-11-2020 | 13-11-2070 | Activate / Remove Policy |
| 000003574918 | Active | 13-11-2020 | | Activate / Remove Policy |
| 000003574941 | Active | 13-11-2020 | | Activate / Remove Policy |
| AP-445091-P | Inactive | 02-10-2025 | 18-09-2027 | DeActivate / Remove Policy |

A modal titled "Confirm policy" is open, asking: "Do you want to Disable the policy from Pay Recovery?" with "Yes" and "No" buttons.

b) Policy will be successfully activated or deactivated for salary recoveries.

The screenshot shows the Department of Posts portal with the following information:

- Department of Posts, Ministry of Communications, Government of India
- Message: policy AP-445091-P Updated Successfully
- Navigation: Home, Accounts, Bank Module, Budget Module, Circle Portal CMS, Enterprise Portal CMS, Others
- Message: Error loading news: HTTP error! status: 404
- Section: Postal Life Insurance
- Welcome PATTABIRAMAN! Office: CEPT, Designation: Assistant Superintendent Of Posts
- Buttons: View Policies, Add Policies, View Policy data
- Statistics: 11 Total, 8 Active, 3 Inactive
- Search: Search policies by Policy Number
- Policy List (partial): 000003575555 (Active), 000003574918 (Active), 000003574941 (Active), KT-3422345-A5 (Inactive), KT-123454546-A5 (Inactive), 000003575553 (Active), 000003575579 (Inactive)

c) In order remove the policy from the list, user can click on “Remove Policy” button. A modal will be opened. Select “Yes” or “No” from the modal.

The screenshot shows a list of policies with the following details:

| Policy Number | Status | Policy Start Date | Last Installment Date | Action |
|-----------------|----------|-------------------|-----------------------|----------------------------|
| 000003574918 | Active | 13-11-2020 | | Activate / Remove Policy |
| 000003574941 | Active | 13-11-2020 | | Activate / Remove Policy |
| KT-3422345-A5 | Inactive | 01-01-2020 | | DeActivate / Remove Policy |
| KT-123454546-A5 | Inactive | 01-10-2025 | 01-01-2030 | DeActivate / Remove Policy |
| 000003575553 | Active | 04-05-2022 | | Activate / Remove Policy |
| 000003575579 | Inactive | | | DeActivate / Remove Policy |

A modal titled "Confirm policy Removal" is open, asking: "Do you want to Remove the policy from Pay Recovery List?" with "Yes" and "No" buttons.



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d) Policy will be successfully activated or deactivated for salary recoveries.

The screenshot shows the PLI dashboard for user PATTABIRAMAN. It displays a summary of 10 total policies, with 8 active and 2 inactive. A search bar is available for finding policies by number. Below the summary, two active policies are listed with their details, including start dates and installment dates. The 'Activate' button is highlighted for the first policy.

D. Addition of PLI Policies for salary recovery:

a) In order to Add the Policy Numbers for Salary recovery , Navigate to “Add Policies” .

b.1) **For Employee Login** : Enter Policy Number and click on Search. If Date Of Birth in entered policy and Date Of Birth of Employee Logged in matches, then policy details will be displayed.

The screenshot shows the 'Add Policies' form. A search box contains the policy number 000003575553. Below the search box, the 'Policy Details' are displayed in a table format. The 'Add Policy' button is visible at the bottom right.

| Policy Details | | | |
|---------------------|------------|-------------------|-------------|
| Policy Number | 3575553 | Premium Frequency | Monthly |
| Policy Status | AP | Last Premium Date | 04-05-2022 |
| Insured Name | XZLUN | Maturity Date | 04-05-2059 |
| Product Name | Suraksha | Maturity Date | 04-01-2034 |
| Policy Opening Date | 04-05-2022 | Payment Method | Cash/Cheque |
| Paid To Date | 31-05-2022 | Next Premium Date | 01-06-2022 |
| Product Type | WLA | Sum Assured | 100000 |
| Date of Birth | 05-03-1980 | Maturity Age | 0 |
| Premium Amount | 495 | | |



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b.2) **For DDO Login** : Enter both employee ID and Policy Number and click on Search. If Date Of Birth in entered policy and Date Of Birth of entered Employee matches, then policy details will be displayed.

| Policy Details | | | |
|---------------------|------------|-------------------|-------------|
| Policy Number | 3575553 | Premium Frequency | Monthly |
| Policy Status | AP | Last Premium Date | 04-05-2022 |
| Insured Name | XZLUN | Maturity Date | 04-05-2059 |
| Product Name | Suraksha | Maturity Date | 04-01-2034 |
| Policy Opening Date | 04-05-2022 | Payment Method | Cash/Cheque |
| Paid To Date | 31-05-2022 | Next Premium Date | 01-06-2022 |
| Product Type | WLA | Sum Assured | 100000 |
| Date of Birth | 05-03-1980 | Maturity Age | 0 |
| Premium Amount | 495 | | |

c) Click on “Add Policy” to add the policy for recovery of amount through salary. Successful message will be displayed

Department of Posts
Ministry of Communications, Government of India

Home Accounts Bank Module Budget Module Circle Portal CMS Enterprise Portal CMS Others

Error loading news: HTTP error! status: 404

Postal Life Insurance

Welcome PATTABIRAMAN! Office : CEPT Designation : Assistant Superintendent Of Posts

View Policies Add Policies View Policy data

Search Policy Number Search



E. Viewing Of Policy Data:

- In order to View the Policy Details , Navigate to “View Policy Data” .
- Enter the Policy Number and click on “View”.

Department of Posts
Ministry of Communications, Government of India

Home Accounts Bank Module Budget Module Circle Portal CMS Enterprise Portal CMS Others

Error loading news: HTTP error! status: 404

Postal Life Insurance

Welcome PATTABIRAMAN! Office : CEPT Designation : Assistant Superintendent Of Posts

View Policies Add Policies View Policy data

Search Policy Number View

- Policy Details like “Employee Details”, “Entry Date”, “Exit Date” and “Active Status” will be displayed.

Department of Posts
Ministry of Communications, Government of India

Home Accounts Bank Module Budget Module Circle Portal CMS Enterprise Portal CMS Others

Error loading news: HTTP error! status: 404

Postal Life Insurance

Welcome PATTABIRAMAN! Office : CEPT Designation : Assistant Superintendent Of Posts

View Policies Add Policies View Policy data

0000003575553 View

Policy Details

| | | | |
|----------------|---------------|--------------|------------|
| Policy Number: | 0000003575553 | Employee ID: | 10049912 |
| Entry Date: | 04-05-2022 | Exit Date: | 04-05-2059 |
| Active Status: | Active | | |

Note : Multiple Employee details can be viewed in PLI Policy Employee ID Mapping Report.

Important Dates:

| SL.No | Event / Action | Date / Timeline |
|-------|---------------------------------------|--|
| 1 | Addition Of New Policies for recovery | 1 st to 9 th of every month for recovery from same Month |
| 2 | Pay Deduction data from McCamish | 15 th of every Month post |
| 3 | Auto Credit to premium | 3 rd of the next month (for salary recovered and paid up to the 2 nd) |
| 4 | Premium Credit Status | From 6 th for previous Month |



FAQ's:

Q : Can a new policy be added for pay recovery after the 9th of the month?

A : No. The window for policy additions is opened only from the 1st to the 9th of every month either by DDO or Employee Self Service.

Q : How does policy removal / deactivation affect the current month's pay recovery?

A : If a policy is removed or deactivated on or before the 9th of the month, the deduction will be stopped, and the policy will not be included in the pay recovery process for the current month nor can be included later.

If a policy is removed or deactivated on or after the 10th, the current month's deduction will proceed, and the policy will only be excluded for pay recovery from next month.

Q: How can a DDO check the list of policies available for the current month's pay recovery?

A : To check the list of policies, navigate to Pay Reports --> Pay Components Configured --> PLI.

If the report is checked or generated on or before the 15th, the list will reflect only the policy additions and recoveries processed up to the previous month.

If the DDO checks or generates the report on or after the 16th of the month, the list will include policies scheduled for pay recovery in the current month.

Q : If a request for premature closure of policy is received after the 10th of the month, how can the policy be disabled from the current month's pay recovery?

A : To stop the deduction of amount for the current salary cycle, wait until the current month deductions are finalized on or after 16th and refer Pay componenets report from pay report and click Disable on the specific policy. Date need not be corrected.

Q : How can the credit status or error status of policy recoveries be checked?

A : While the recovery data is available after paybill/salary payment, the premium credit Status for the previous month's deductions will be available on or after the 6th of the current month.

Q: How is the premium auto credited when the salary is paid on or after 3rd of the month (for the previous month)?

A : The recovery details must be manually updated/uplaoded into the Maccamish system.

Q : How should errors be handled when report is generated on 6th?

A : Any errors identified in the report must be handled manually.

Q : Whether RPLI can be included for Pay Recovery?

A : No

Q : Policy not available in Pay componenet report eventhough mapped for recovery?

A : Those policies paid up till previous month will be part of current month pay recovery. Pls make sure policy prmium paid upto previous Month.

Q : Whether those Policy already configured manually are migrated?

A : Yes. Except RPLI, Invalid policy Ids, Valid till Nov, Same policy mapped with more than 1 employee IDs are excuded from migration. Out of 6lac active policy data, only 2lac policies were valid and migrated.



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Q : How to check list of Policies configured under DDO?

A : Refer .DDO Card-> Other Reports-> PLI Policies Mapping Status(McCamish Integration) Report , Report will be available wef 05/12

Note : Manual premium corrections must be uploaded or updated into the Maccamish system by the 13th of the month to ensure they are included in the current pay recovery cycle.

-End-

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