

File No. 16-01/2013-Inspn.
Government of India
Ministry of Communications & IT
Department of Posts
(Inspection Unit)

Dak Bhavan, Sansad Marg,
New Delhi, Dated 09/10/2015

To,

1. All Heads of Postal Circles.
2. All Postmasters General.
3. All Directors, Postal Training Centres.
4. Director, RAKNPA, Ghaziabad.
5. Army Postal Directorate.

Subject: Supplementary Inspection Questionnaire for CPC/SO/BO relating to PLI/RPLI Branches.

Sir/Madam,

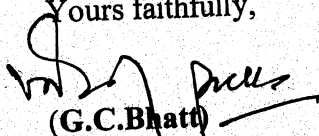
Inspection Division in consultation with Postal Life Insurance Directorate have developed a set of Supplementary Inspection Questionnaire relating to PLI/RPLI Branches of following offices:-

1. **Supplementary Inspection Questionnaire of CPC Co-Located in Head Post Office.**
2. **Supplementary Inspection Questionnaire for Sub Offices**
3. **Supplementary Inspection Questionnaire for Branch Offices**

2. I am directed to forward the copy of the Supplementary Inspection Questionnaire for guidance and necessary action.
3. Circles are also requested to circulate the Supplementary Inspection Questionnaire to its subordinate units for using the same while inspecting the respective offices.
4. Receipt of this letter may kindly be acknowledged.
5. This issues with the approval of Member (PLI) Postal Services Board.

Enclosure:- Supplementary Inspection Questionnaire.

Yours faithfully,


(G.C. Bhatt)
Asstt. Director (Inspection)

Copy to:-

1. CGM,(PLI), Postal Life Insurance Directorate, Chanakyapuri P O Complex New Delhi-110021.
2. Shri Ravi Babu, Director, CEPT Mysore to upload the above questionnaires on the website of the Department for information to all concerned.

Centre for Excellence in Postal Technology, Mysore-570010		
12 OCT 2015		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
G.M.	Director	A.D.(A)

QUESTIONNAIRE FOR INSPECTION OF CPCs

Note: Questions relate to both PLI & RPLI and observations should be recorded separately.

Sales

1. When was the last inspection carried out? Are there any pending paras? What action has been taken by incharge of CPC to settle them?
2. Has all the CPC staff got trained in Mc Camish software? Does the office is having trained standby staff to work during leave vacancies/emergent situations?
3. Is the list of Name & Agent code of PLI/RPLI sales personnel under the CPC jurisdiction has been supplied to the CPC by Divisional Office? Whether the data base of eligible clientele of PLI and RPLI is maintained in the CPC and visits of sales persons regulated to cover the left over clientele? Are the leads received at CPC are sent to agents for further action and managed through lead management system or not?
- 3 (i) How many PLI/RPLI Direct Agents are working under CPC.? How many out of them are Anganwadi workers/women. How many out of them have passed licentiate examination and issued licence so far?
- (ii) Check the stock Register of LI-7 receipt books to be issued to sales personnel/Agents and state the results.
- (iii) What is the amount of incentive paid to each category of sales force, both in PLI and RPLI during the last year and current year? Have they been paid due incentive timely. What is the pendency and reasons thereof?
- (iv) Whether forms required for the use of customers/ office are available and if yes, then for how many months the stock will last?
4. Is the staff working in the CPC aware of the salient features of all the existing PLI/RPLI policies and the after sales services available? Whether supervisor/counter assistant have been trained on citizen's charter & citizen charter is available? Forms required for the use of customers/office are available to meet the requirements of Six months?

Proposal Processing

5. What is the total number of PLI & RPLI proposals pending for acceptance and likely date by which the same will be updated ?
6. What is the time taken between receipt of proposal & acceptance? For how long the oldest proposal is pending and what efforts are being made to bring arrears up to date?
- 6.1 Whether scanning of all existing policies has been completed & uploaded in ECMS? If not what steps are taken & what is the timeline for its completion? What is the time taken by the system for ECMS process in respect of new Proposals & Service requests?
- 6.2 Generate stage report & critically examine how many proposals /service requests are pending to be attended to & at what stage they are pending. Cases pending above one month should be pursued for immediate settlement.
7. Examine 5 PLI/RPLI proposal files to see that no column of the proposal form/ medical report is left unanswered and no vague replies are recorded in them. How many proposals out of these five proposals were accepted within 15 days from the date of deposit of first premium?
8. Please check the case of files proposals of Sum assured exceeding Rs five lakhs and see whether they are accepted by the authorized authority.
9. Is there any backlog of work relating to issue of Policy Bonds? If yes, what is the arrangement made for its clearance?