

POSTAL LIFE INSURANCE OPERATIONS AND ACCOUNTING PROCESSES

TRANSITION TO IT 2.0 (PHASE II)

Issued by

PLI Directorate, Chanakyapuri, Delhi

(10.10.2025)

**Details of Functionalities being introduced after Phase –II Deployment in
Booking Solution under APT 2.0**

Subsequent upon phase-II deployment i.e. wef 10.10.2025, All counter PAs of HOs/SOs shall be able to access/provide the under mentioned services/functionalities using below modules /Sub modules in Booking Solution under APT 2.0.

Module	Sub-Module
New Business	Quote
	Indexing
Financial Service Request Indexing	Commutation
	Conversion
	Death Claim
	Maturity Claim
	Survivor Claim
	Revival
	Loan
	Reduced Paid-up
	Surrender
	Freelook/Policy Cancellation
	Refund of Premium/Loan
	Withdraw Request
Non-Financial Service Request Indexing	Address Change
	Name Change
	Assignment/Reassignment
	Billing Frequency Change
	Billing Method Change
	Change of Nomination
	Duplicate Policy Bond
	Agent Change
	Premium Receipt book
	Missing Requirements Documents
Policy Summary	Merge Customer ID
	Policy Summary
Customer Search	Customer Search
Fetch-list of missing documents	Fetch-list of missing documents
Fetch-list of eligible requests to withdraw	Fetch-list of eligible requests to withdraw
Quote	1. Loan

	2. Surrender 3. Revival 4. Commutation 5. Conversion 6. Reduced Paid-up 7. Loan Repayment 8. Loan Repayment Schedule 9. Freelook Cancellation
Transaction Status	Transaction Status
Customer Mobile No. and Email Add/Update	1. Mobile No. Add 2. Mobile No. Update 3. Email Add 4. Email Update
Disbursement Status	Disbursement Status