



IRDA TRAINEE User Manual

Version History

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Pre-requisites

The below mentioned hardware and software infrastructure is needed to access the portal and its features.

Field	Description
Hardware - Personal Computer / Laptop	
Processor	Intel processors Pentium 4 / i3 / i5 / i7 @ 1GHz or above
RAM	1 GB RAM or above (min 1GB recommended)
Hard Disk	80 GB or above HDD
Ethernet Card	10 / 100 Mbps Ethernet card
Printer	Laser Jet
Software	
Operating System	Windows XP (with Service Pack2), Windows Vista, Windows 7, Mac OS v 10.5
Office Utility	MS- Office 2003 or above
Browsers	Internet Explorer 7.0 / 8.0, Apple Safari 5.0 (recommended IE 8.0)
Java Runtime	JDK- 1.60
Adobe Acrobat Reader	9.0 version

Introduction to BAP portal

IRDA has taken an initiative of automation for facilitation of various activities that need to be undertaken by Insurance companies, surveyors, brokers and Third Party Administrators (TPAs) for regulatory compliance. This program is called the 'Business Analytics Project' or BAP as referred to henceforth.

In the current technology driven environment, this portal delivers ease of use and uniformity in routine activities like online filing of returns, submitting applications for enrollment, Fresh License, renewals and other modifications to existing licenses. This application also supports on-line clarification of queries, and provides notifications, reminders and alerts for adherence to timelines.

This initiative will ensure good communication between insurance players and IRDA. Standardized and timely collection of industry data will help IRDA in efficient supervision of insurance operations, monitoring and tracking for the development of the insurance industry in India.

Role of Surveyors

Surveyors or Loss Assessors are professionals hired by insurance companies to assess the actual loss arising on the occurrence of fortuitous events such as fire, burglary and so on for settlement of claims. They act as intermediaries between the insurer and the insured in settling the claims. Surveyors operate in general insurance business area.

Surveyors operate in multiple lines of business, for example - a fire insurance surveyor can function simultaneously as a marine surveyor. Some of the responsibilities entail carrying out surveys for buildings, machinery, ports and other financially viable items that need insurance protection. The surveyor prepares reports to assess the actual loss and to verify the amount claimed by the insured. Insurance companies settle claims based on the reports submitted by surveyors.

Steps of becoming a Surveyor

The steps of becoming a licensed surveyor are shown in a pictorial diagram. The steps are explained below the diagram.



1. **Registering on BAP Portal** - To acquire a surveyor license, the first step is to register yourself on the BAP portal. After successful registration, you can apply for a training request.
2. **Selecting the Trainer** - After registration, to undergo the training process you need to [select the trainer](#) and the department in which you want to undergo training.
3. **Trainer Acceptance Certificate** - If the trainer selected by you accepts the training request, then, you will receive an email notification from IRDA informing you of the same. If the trainer rejects your training request, you need to select another trainer for your training.
4. **Form 13 - Trainee Surveyor Enrollment** - Once your training request is accepted, you need to fill this form for training course enrollment. Trainee needs to complete the training in order to apply for the license.

5. **Appearing for the exam conducted by Insurance Institute of India (III)** - After the trainer submits your third quarterly report, Insurance Institute of India (III) schedules an examination slot for you and you then need to appear for the exam.
6. **Training Completion Certificate** - After you successfully complete your training, you will receive the Training Completion Certificate from the trainer.
7. **Applying for a Fresh License** - After successfully clearing the exam conducted by the Insurance Institute of India (III), you can apply for a new surveyor license. Once you receive the license, you can start operating as a licensed Surveyor.


Overview

The BAP Portal facilitates smooth registration process for users and performs the following activities:

- Online submission of [enrollment](#) and [Fresh License](#) applications.
- View application status (See: [View Application Status](#)).
- Retrieve user ID and password (See: [Retrieving credentials](#)).

After registration, you are required to undergo mandatory training for twelve months.

Post completion of training, you have to appear for an examination conducted by III - Insurance Institute of India. On successfully passing the examination, you can apply for the Fresh License with IRDA.

 *For already existing/licensed surveyors, seeking additional departments, the training period is of six months.*

Trainee Registration

To enroll as trainees, you first need to register yourself on the BAP portal.

To register on the portal:



1. Open a browser and enter the following address: **www.irdabap.org.in**. The IRDA BAP portal home page is displayed.
2. Click **Register**. The **New User Registration** screen is displayed.
3. From **User Type** drop-down list, select **Individual**.
4. From **User Role** drop-down list, select **Trainee**. The **Trainee Registration** screen is displayed. All the mandatory fields in the form are marked with an asterisk (*).

Figure 1: User Registration screen

The fields in the **Trainee Registration** screen are explained in the following table.

Field	Description
Personal Details	
Do you own a Firm	Select Yes or No. If yes, enter the name of the Sole Proprietor Firm.
First Name	Enter your first name.
Middle Name	Enter your middle name.
Last Name	Enter your last name.

Field	Description
Father/Husband's Name	Enter your father's or husband's name, whichever is applicable.
Date Of Birth	Select the day, month, and year.
PAN Number	Enter your PAN number.
Passport No.	Enter your Passport number.
Unique Identification Number	Enter your Unique Identification number.
Voter ID Card Number	Enter your Voter ID Card number.
Nationality	<i>Indian</i> is displayed by default.
SSLC Certificate Number	Enter the SSLC (Secondary School Leaving Certificate) number.
Year of Passing	Enter the year of the passing as present in the SSLC.
Address Details	
Same as Present Address	Select this check box if your Present Address and Permanent Address are the same.
Present Address	
Address1	Enter the first line of the address.
Address2	Enter the second line of the address.
Address3	Enter the third line of the address.
Country	<i>India</i> is displayed by default.
State	Select the state from the drop-down list.
District	Select the district from the drop-down list.
City	Select the city from the drop-down list.
Region	Select the region from the drop-down list.
Pin Code	Enter your pin code number.
Permanent Address	
Address1	Enter the first line of the address.
Address2	Enter the second line of the address.
Address3	Enter the third line of the address.
Country	<i>India</i> is displayed by default.

Field	Description
State	Select the state from the drop-down list.
District	Select the district from the drop-down list.
City	Select the city from the drop-down list.
Region	Select the region from the drop-down list.
Pin Code	Enter the pin code number.
Contact Details	
Email ID	Enter your email ID.
Alternate Email ID	Enter your alternate email ID.
Phone Number (off)	Enter your office phone number.
Phone Number (res)	Enter your residence phone number.
Fax Number	Enter your fax number.
Security Question	Select a security question from the drop-down list.
Security Answer	Enter the answer for the selected security question. Please note down the security question and answer, as these would help you retrieve your user ID/password in case you forget them.
Verification Code	
Enter Verification Code	Enter the case-sensitive verification code.

5. Enter the relevant information and click **Submit**. An **Acknowledgement** dialog box is displayed along with your **User ID**, notifying that the registration is successful.



Figure 2: Trainee Registration Confirmation screen

6. Click **OK**. The user ID and password are sent to your registered email ID.

After you have registered in the portal, you can [enroll](#) yourself as a trainee to receive training.

- i** *If you try to create multiple accounts by entering same combination of name, SSLC Certificate number, city and year of passing, a "User already exists" error message is displayed.*



Figure 3: Duplicate user error message

Login Process

To access the portal:

To access the BAP portal, you need to login by entering valid credentials.



1. Open a browser and enter the following address: **www.irdabap.org.in**. The **IRDA BAP** portal home page is displayed.
2. Click **Login**. The **IRDA BAP** portal login screen is displayed.



Figure 4: IRDA BAP portal Login screen

3. In **User** field, enter your user ID.
4. In **Password** field, enter your password.
5. Click **Log On**. The **Change Password** screen is displayed if you are logging in for the first time or if your current password is in use for 90 days or more. Otherwise, the [User Profile](#) page is displayed.

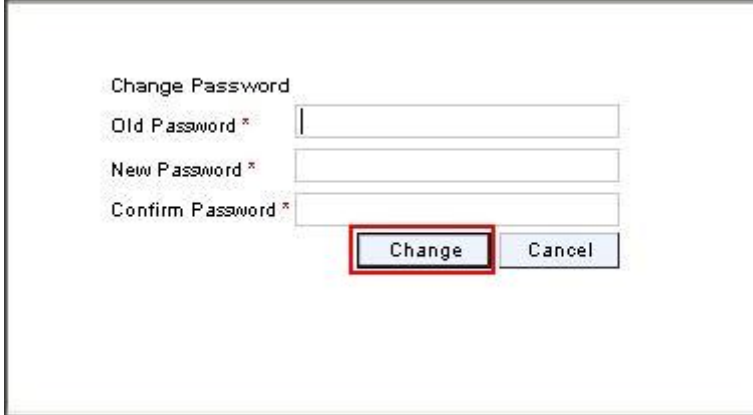
A screenshot of a web form titled "Change Password". It contains three input fields: "Old Password *", "New Password *", and "Confirm Password *". Below the fields are two buttons: "Change" and "Cancel". The "Change" button is highlighted with a red rectangular border.

Figure 5: Change Password screen

If the **Change Password** screen is displayed:

1. In **Old Password** field, enter your current password.
2. In **New Password** field, enter your new password.
3. In **Confirm Password** field, re-enter your new password.
4. Click **Change** to change the password or click **Cancel** to return to the login screen.

To Log Off from the portal:



1. Click **Log Off**. A **Log Off** confirmation dialog box is displayed.

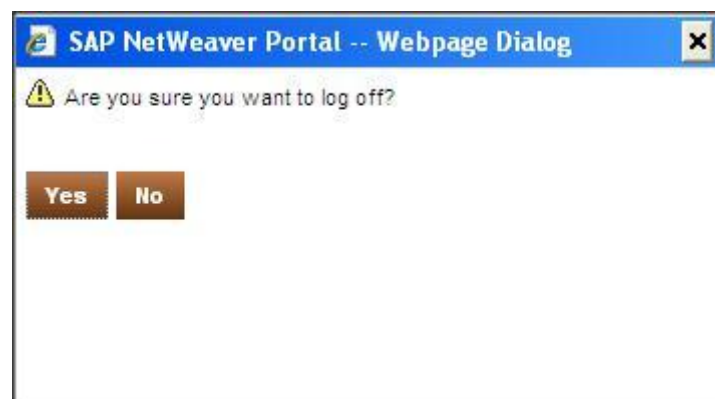


Figure 6: Log Off Confirmation dialog box

2. Click **Yes** to log off or click **No** to go back to the previous screen.

Points to Remember

For User ID:

- If you have not logged on to the portal for three months or more, your user ID would be deleted.
- If you have registered on the portal but have not filled up or submitted any application form for three months, your user ID would be deleted.
- An email notification will be sent to you three days before the three-month period ends, after which your user ID will be permanently deleted.

For Password:

- Your account will be locked after you make three unsuccessful attempts to log into the portal post which you need to have offline communication with IRDA to unlock your password.
- In case of password change, your new password must be different from the last five passwords used to access the portal.

Retrieving Credentials

If you forget your login credentials, you can retrieve them using the **Retrieve User ID/Password** option.

To Retrieve User ID:



1. On the **IRDA BAP** portal login screen, click **Forgot User ID / Password**. The **Retrieve User ID/Password** screen is displayed.

Retrieve User ID/Password

Retrieval Type * User ID Password

Figure 7: Retrieve User ID/Password selection

2. In **Retrieve Type**, select **User ID**. Additional fields are displayed.

Retrieve User ID/Password

Retrieval Type * User ID Password

User Type * Individual

Email Address * ajay@gmail.com

Retrieve User Id Cancel

Figure 8: Retrieve User ID options

3. From **User Type** drop-down list, select **Individual**.
4. In **Email Address** field, enter the email ID that you had entered during registration.
5. Click **Retrieve User ID**. An **Acknowledgement** dialog box is displayed notifying that your user ID has been sent to your registered email ID.



Figure 9: User ID retrieval confirmation message

6. Click **OK**.

The User ID is sent to your registered email ID.

To Retrieve Password:



1. On the **IRDA BAP** portal login screen, click **Forgot User ID / Password**. The **Retrieve User ID/Password** screen is displayed.

Figure 10: Retrieve User ID/Password selection

2. In **Retrieval Type**, select **Password**. Additional fields are displayed.
3. In **User ID** field, enter your user ID.

Figure 11: Retrieve Password options

4. Click **Submit**. Additional fields are displayed.

Figure 12: Additional Retrieve Password options

5. From **Security Question** drop-down list, select the question that you had selected at the time of registration.
6. In **Security Answer** field, enter the answer to the security question.



Retrieve User ID/Password

Retrieval Type * User ID Password

User ID *

Enter same details, provided at the time of registration

Note : ALL Fields marked with * are mandatory

Security Question * Security Answer *

Figure 13: Retrieve Password process

7. Click **Retrieve Password**. An **Acknowledgement** dialog box is displayed notifying that your password has been sent to your registered email ID.



Figure 14: Password retrieval confirmation message

8. Click **OK**.

The password is sent to your registered email ID.

 *If you enter incorrect retrieval information, an error message is displayed.*



Figure 15: Incorrect retrieval information error message

User Profile

When you login to the portal, the **User Profile** screen is displayed. On this screen, you can change your password and update profile.



The screenshot shows a web interface with a header containing 'User Profile' and 'Trainee'. Below the header is a section titled 'User Profile' containing a list of fields and their values:

Name	Ajay Sharma
Address1	123-East View
Address2	
Address3	
Country	INDIA
State	Maharashtra
District	Mumbai
City	Mumbai
Region	Urban
PinCode	400027
Email ID	ajay@gmail.com
Contact Number	+91 - 9820098200

At the bottom of the form are two buttons: 'Change Password' and 'Update User Profile'.

Figure 16: User Profile screen

To Change Password:



1. On the **User Profile** screen, click **Change Password**. The **Change Password** screen is displayed.



The screenshot shows a web interface with a header containing 'User Profile' and 'Trainee'. Below the header is a section titled 'User Profile' containing a note and three password input fields:

Note: All fields marked with * are mandatory.

Old Password: *

New Password: *

Confirm New Password: *

At the bottom of the form are two buttons: 'Change Password' and 'Cancel'. The 'Change Password' button is highlighted with a red box.

Figure 17: User Profile - Change Password screen

2. In **Old Password** field, enter the current password.
3. In **New Password** field, enter the new password.

4. In **Confirm New Password** field, re-enter the new password.
5. Click **Change Password**. An **Acknowledgement** dialog box is displayed notifying that your password has changed successfully.



Figure 18: Password Change confirmation message

6. Click **OK**.

To Update User Profile:



1. On the **User Profile** screen, click **Update User Profile**. The **Update User Profile** screen is displayed.
2. In **Contact Details**, you can update all your contact related information.

New User Registration					
User Type:	Individual		User Role	Trainee	
Do you own a Firm	<input type="radio"/> Yes <input checked="" type="radio"/> No				
Personal Details					
First Name	Ajay	Middle Name	Ram	Last Name	Sharma
Father/ Husband's Name	Ram	Date Of Birth	28-03-1991	PAN Number	AJAYY1234T
Voter ID Card Number		Passport No		Unique Identification (UID)	
Nationality	Indian				
Address Details					
Present Address			Permanent Address		
Address 1	123-East View		Address1	123-East View	
Address2			Address2		
Address3			Address3		
Country	INDIA		Country	INDIA	
State	Maharashtra		State	Maharashtra	
District	Mumbai		District	Mumbai	
City	Mumbai		City	Mumbai	
Region	Urban		Region	Urban	
Pin Code	400027		Pin Code	400027	
Contact Details					
Email ID *	ajay@gmail.com	Fax Number	+91 - [] - []	Phone Number (Off)	+91 - 020 - 66485965
Alternate Email ID		Mobile *	+91 - 9823156325	Phone Number (Res)	+91 - [] - []
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>					


Figure 19: Update User Profile screen

3. Click **Submit**. An **Acknowledgement** dialog box is displayed notifying that your profile has been successfully updated.



Figure 20: User Profile Update confirmation message

4. Click **OK**.

 *You can update the rest of the details through the Modification tab. However, you can view this tab only after you become a licensed surveyor.*

Description of the menu tabs

The Trainee user screen contains the following menu tabs:

1. **Surveyor Training and Enrollment** – Allows you to select a trainer and a department for your training and create a request for the same. After the trainer accepts your training request, you need to submit Form 13 to IRDA to enrol yourself as a trainee. The **Surveyor Training and Enrollment** tab contains the following options.
 - a. **Trainer Selection** – Contains options for creating a new training request and viewing the status of the training request.
 - **Create New Request** - Allows you to select the trainer and departments in which you want to be trained and send the training request to the selected trainer. (See: [Creating New Request](#))
 - **View Submitted Request** - Allows you to view the status of the request submitted for trainer selection. (See: [Viewing Submitted Requests](#))
 - b. **Form 13 - Trainee Surveyor Enrollment** – Allows you to submit the Form 13 application to IRDA in order to enrol yourself as a trainee. Once your application is approved, you will be allotted a unique enrollment number by IRDA, post that you can start training in the selected departments. (See: [Submitting Form 13 - Trainee Surveyor Enrollment](#))
2. **Licensing** - Allows you to apply for a new licence with IRDA once you complete the training and pass the surveyor examination conducted by the Insurance Institute of India. (See: [Fresh License Application](#))
3. **View Application Status** - Allows you to track the status of the submitted enrollment and Fresh License applications. (See: [View Application Status](#))
4. **Pending for clarification** - Allows you to upload additional documents and provide clarification required by IRDA during processing of applications. (See: [Pending for Clarification](#))

Trainer Selection

To enrol yourself as a trainee, you first need to select the department and the trainer under whom you want to undergo training.

Creating New Request

In **Create New Request**, you can select the departments in which you want to be trained and the trainer under whom you would like to undergo training. You can send the request to the trainer.

To Create New Request:



1. Click **Trainee** tab.
2. Click **Surveyor Training and Enrollment** tab.

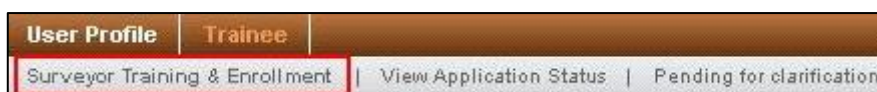


Figure 21: Surveyor Training and Enrollment tab

3. On **Surveyor Training and Enrollment** screen, click **Trainer Selection** and then click **Create new request**.

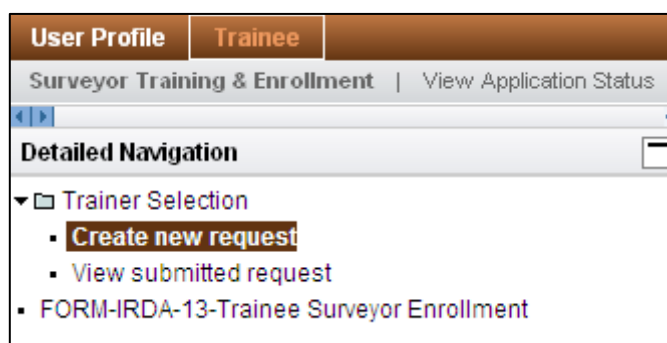


Figure 22: Create New Request option

4. Select the department in which you want to be trained by selecting the corresponding check box. You can select more than one department.

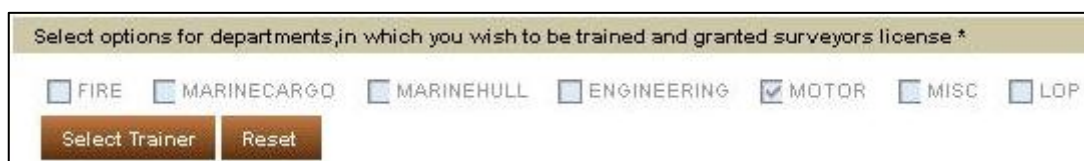


Figure 23: Select Department option

- Click **Select Trainer**. The **Trainer Selection Table** section is displayed.


The screenshot shows a web interface for selecting a trainer. At the top, there is a header: "Select options for departments, in which you wish to be trained and granted surveyors license *". Below this are several checkboxes for departments: FIRE, MARINE CARGO, MARINE HULL, ENGINEERING, MOTOR (checked), MISC, and LOP. There are two buttons: "Select Trainer" and "Reset".

Below the checkboxes is a section titled "Trainer Selection Table *". It contains a table with the following structure:

Departments	Select Trainer	Trainer SLA NO.	SLA Expiry
MOTOR			

Below the table is a section titled "Categorization Details (Select the row from above table to get categorization details of the trainer)". It contains two input fields: "Department" and "Category". There are two buttons: "Submit" and "Cancel".

Figure 24: Trainer Selection Table section

- In the **Select Trainer** column, click the cell corresponding to the department for which you want to select the trainer. Click  to display the list of trainers. You can filter the list by entering search criteria in the empty field below the column names and then clicking the filter icon.

The screenshot shows an "Advanced Search" window with a "Go" button. Below the button is a table with the following columns: Surveyor Id, First Name, Last Name, SLA Number, Category, City, and License Expiry. The table contains one row of data:

Surveyor Id	First Name	Last Name	SLA Number	Category	City	License Expiry
10327	ASHISH ANANT	DESAI	39608	B	Borivali West	20-01-2014

Figure 25: List of trainers

- From the list of trainers, select the trainer under whom you would like to undergo training. The details of the selected trainer are displayed in the **Trainer Selection Table** section.

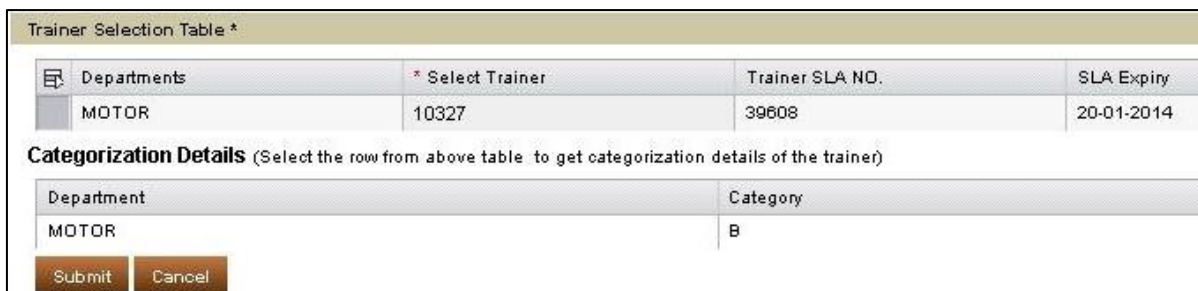


Figure 26: Trainer Details section

- Click **Submit**. The **User Confirmation Message** dialog box is displayed to confirm submission.



Figure 27: New Request confirmation message

- Click **Yes**. An **Acknowledgement** dialog box is displayed notifying that you have successfully selected the trainer.

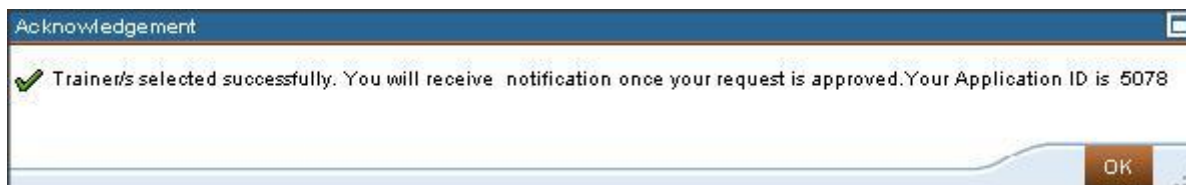


Figure 28: Trainer Selection confirmation message

- Click **OK**.

The trainer whom you have selected for training can either accept or reject the training request. You can view the status of the training request from **View Submitted Request** tab.

i You will see the list of trainers from the same state where you reside. You can select a maximum of seven departments and a maximum of four trainers of category A and B only if required.

Viewing Submitted Requests

In **View Submitted Request**, you can view the status of the training request. On receiving the request, the trainer accepts or rejects the application. You will receive an email notification conveying the decision of the trainer.

To View Submitted Request:



1. Click **Trainee** tab.
2. Click **Surveyor Training and Enrollment** tab.
3. On **Surveyor Training and Enrollment** screen, click **Trainer Selection** and then click **View Submitted request**.

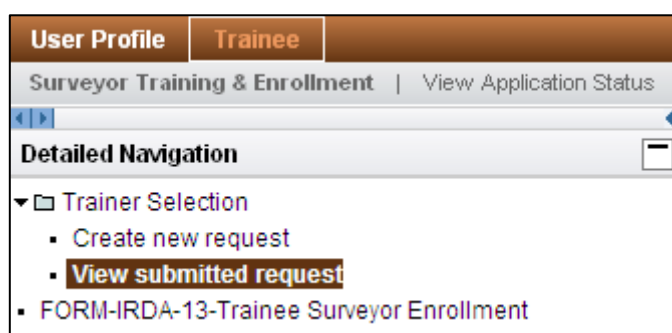



Figure 29: View submitted request option


The fields in the **View Submitted Request** screen are explained in the following table.

Field	Description
Application ID	Displays the application ID generated on submission of the trainer selection request.
Name of the Trainer	Displays the trainer name.
Submitted Date	Displays the date on which the application was submitted.
Request Status	Displays the status of the application. There can be the following statuses: <ul style="list-style-type: none"> • Application Submitted • Application Approved • Application Rejected

 Once your application is accepted by the trainer, the status of the application is updated to **Application Approved**.

Once the trainer accepts the training request, you need to submit [Form 13](#) to IRDA to enrol yourself as a trainee.

To view the Trainer Acceptance Certificate:

 In **View submitted request**, select the row for which the **Request Status** column displays **Application Approved** and click **View**. The **Trainer Acceptance Certificate** is displayed.

Application Id	Name of Trainer	Submitted Date	Request Status
5078	ASHISH ANANT DESAI	13.07.2012	Application approved

Figure 30: Application Status

 You can only view the approved Trainer Acceptance Certificates.

To Print Trainer Acceptance Certificate:



1. In **View submitted request**, select the row for which the **Request Status** column displays **Application Approved** and click **View**. The **Trainer Acceptance Certificate** is displayed.
2. Click **Print** to print the **Trainer Acceptance Certificate** (A copy of this certificate must be annexed while submitting **Form 13 – Application for Trainee Surveyor Enrollment**).

Submitting Form 13 - Trainee Surveyor Enrollment

Once you complete trainer selection and the selected trainer accepts your training request, you need to submit Form - 13 application to IRDA and obtain approval to become a trainee.

Instruction:

- *It is mandatory attach the **Trainer Acceptance Certificate** along with the enrollment application.*

To Submit Form - 13 Trainee Surveyor Enrollment:



1. Click **Trainee** tab.
2. Click **Surveyor Training and Enrollment** tab.
3. On **Surveyor Training and Enrollment** screen, click **Form 13 - Trainee Surveyor Enrollment**. The **Trainee Personal Details** screen is displayed. All the mandatory fields in the form are marked with an asterisk (*).

The **Trainee Surveyor Enrollment** form comprises of the following sections:


1. [Trainee Personal Details](#)
2. [Trainee Occupation Details](#)
3. [Trainer Details](#)
4. [Upload Documents](#)
5. [Confirm Details](#)

Once you have successfully submitted the application, you can check its status through the [View Application Status](#) tab.

The buttons available in the **Form 13 - Trainee Surveyor Enrollment** form are explained in the following table.

Button	Description
Submit	Click to submit the application form once you have selected the declaration check box.
Cancel	Click to stop the application process and return to the home page. This action will also clear all the information entered without saving it.
Save as Draft	Click to save all the data entered in the form. You can use this option if you want to submit the form at a later time.

Button	Description
View Submitted Form	Click to view the submitted form (Form - 13) in read only mode
Print	Click to print the Form - 13 Trainee Surveyor Enrollment.
Clear	Click to clear the information entered.
Previous	Click to go to previous section.
Next	Click to go to the next section.

 Once you have selected the declaration check box on the **Confirm Details** screen, the **submit** button is activated.

Trainee Personal Details

The **Trainee Personal Details** screen displays your personal information entered during registration.

To view Trainee Personal Details screen:



1. Click **Trainee** tab.
2. Click **Surveyor Training and Enrollment** tab.
3. On the **Surveyor Training and Enrollment** screen, click **Form - 13 Surveyor Trainee Enrollment**. The **Trainee Personal Details** screen is displayed.

1 Trainee Personal Details					2 Trainee Occupation Details		3 Trainer Details		4 Upload Documents		5 ConfirmDetails	
<div style="display: flex; justify-content: space-between;"> ← Previous Next → </div>												
Applicant Name												
First Name	Ajay			Middle Name	Ram		Last Name	Sharma				
Present Address												
Address 1	123-East View			Address 2			Address 3					
City/Town/Village	Mumbai			District	Mumbai		State	Maharashtra				
Country	INDIA			Pincode	400027							
Permanent Address												
Address 1	123-East View			Address 2			Address 3					
City/Town/Village	Mumbai			District	Mumbai		State	Maharashtra				
Country	INDIA			Pincode	400027							
Communication												
Phone No (Resi)				Phone No.(Off)			Mobile No	+91 9820098200				
Email	ajay@gmail.com			Alternate email								
Others												
DOB	28-03-1991			Nationality	Indian							
<div style="display: flex; justify-content: space-between;"> Submit Cancel Save as draft View Submitted Form Print Clear </div>												

Figure 31: Trainee Personal Details screen



All the information displayed is in read-only mode.

Trainee Occupation Details

In **Trainee Occupation Details**, you need to enter information regarding qualification, occupation status, employment details, and department/s selected for surveyor training.

To view Trainee Occupation Details screen:



On the **Trainee Personal Details** screen, click **Next**. The **Trainee Occupation Details** screen is displayed.

1 Trainee Personal Details
2 **Trainee Occupation Details**
3 Trainer Details
4 Upload Documents
5 ConfirmDetails

Previous
Next

1. Qualification*

Qualification Type	*Description	Date of passing	Action
Insurance	Ins24	11-07-2010	✘

2. Occupation status*

Student
 Professional
 Business
 Employee
 Service
 Housewife
 Others
 Professional

3. Employment Details

3.1. Whether the applicant is currently employed?: * Yes No

Name of Employer *

Nature of Organization *

Period of employment From * To *

Nature of work *

3.2. Whether any other business/profession carried out?: * Yes No

3.2.1 Provide Details of other business/profession carried out

Name of firm * Designaiton *

Nature of business *

4. Select options for departments,in which you wish to be trained and granted surveyors license*

FIRE
 MARINECARGO
 MARINEHULL
 ENGINEERING
 MOTOR
 MISC
 LOP

Submit
Cancel
Save as draft
View Submitted Form
Print
Clear

Figure 32 Trainee Occupation Details screen


The fields on the **Trainee Occupation Details** screen are explained in the following table.

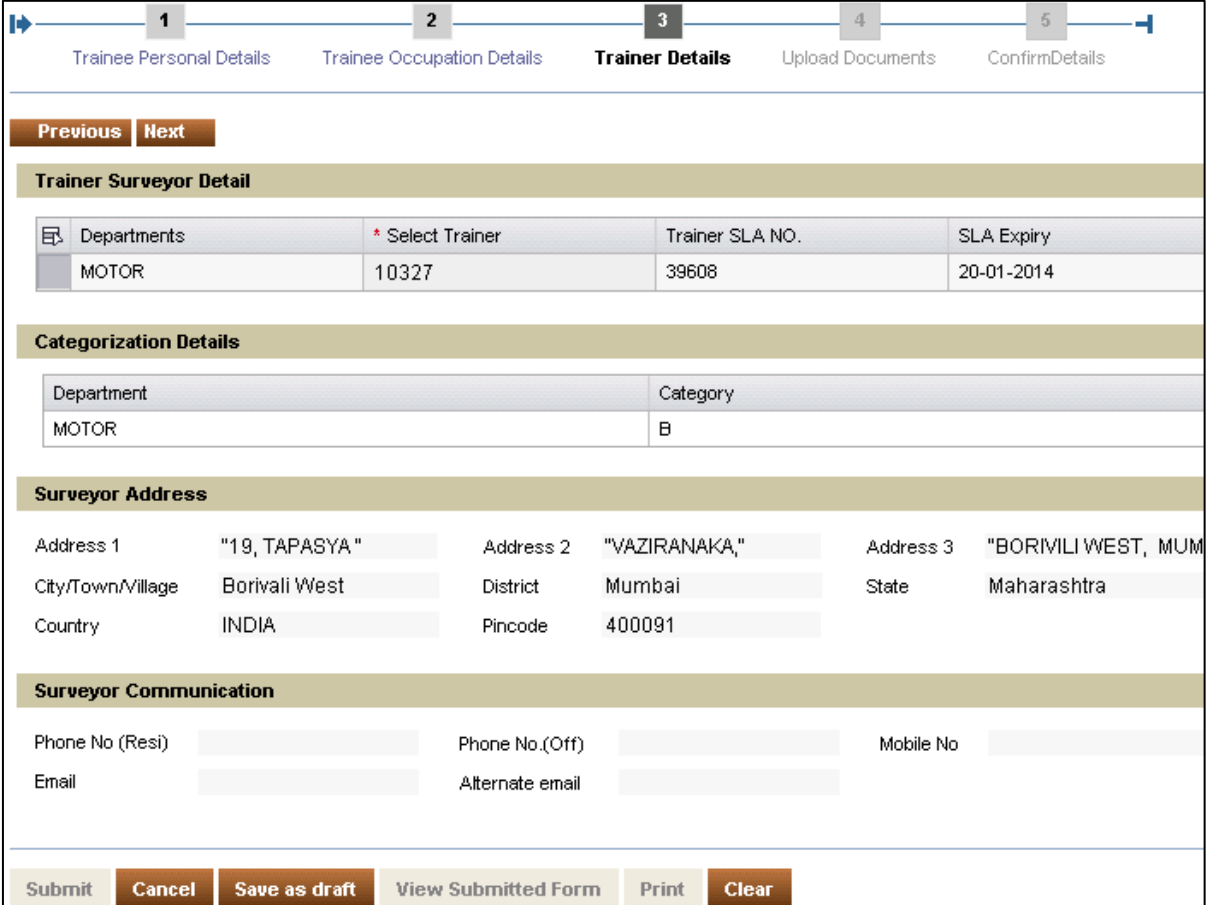
Field	Description
Qualification	
Qualification Type	Select the qualification type from the drop-down list.
Description	Enter the details for the selected qualification.
Date of Passing	Select the day, month, and year of passing.
Occupation Status	
Occupation Status	Select the occupation type. If your occupation type is not available, select Others and enter your occupation type in the corresponding field.
Employment Details	
Whether the applicant is currently employed	Select Yes or No. If Yes, enter the details of the current employment.
Whether any other business/profession carried out	Select Yes or No. If Yes, enter the details of the current business/profession.
Departments for Training and Surveyor License	
Select options for departments, in which you wish to be trained and granted surveyors license	Select the department in which you want to be trained by selecting the corresponding check box.

Trainer Details

In **Trainer Details**, select the trainer who has approved your training request in the department selected by you.

To View Trainer Details screen:

 On the **Trainee Occupation Details** screen, click **Next**. The **Trainer Details** screen is displayed.




The screenshot shows the 'Trainer Details' screen with a progress bar at the top indicating five steps: 1. Trainee Personal Details, 2. Trainee Occupation Details, 3. **Trainer Details**, 4. Upload Documents, and 5. ConfirmDetails. Below the progress bar are 'Previous' and 'Next' buttons. The main content is divided into four sections:

- Trainer Surveyor Detail**: A table with columns for Departments, * Select Trainer, Trainer SLA NO., and SLA Expiry. The data row shows: MOTOR, 10327, 39608, and 20-01-2014.
- Categorization Details**: A table with columns for Department and Category. The data row shows: MOTOR and B.
- Surveyor Address**: A form with fields for Address 1, Address 2, Address 3, City/Town/Village, District, State, Country, and Pincode. The data entered is: Address 1: "19, TAPASYA", Address 2: "VAZIRANAKA,", Address 3: "BORIVLI WEST, MUM", City/Town/Village: Borivali West, District: Mumbai, State: Maharashtra, Country: INDIA, Pincode: 400091.
- Surveyor Communication**: A form with fields for Phone No (Resi), Phone No.(Off), Mobile No, Email, and Alternate email.

At the bottom of the screen are buttons for Submit, Cancel, Save as draft, View Submitted Form, Print, and Clear.

Figure 33: Trainer Details screen

To Select the Trainer:

 From **Trainer Surveyor Detail** list, select the trainer. Detailed information about the trainer is displayed in read only mode.

Upload Documents

In **Upload Documents**, you need to upload the necessary documents for the successful submission of the Form 13 application.

To View Upload Documents screen:



On the **Trainee Details** screen, click **Next**. The **Upload Documents** screen is displayed.

The screenshot shows the 'Upload Documents' screen with a progress bar at the top indicating five steps: 1. Trainee Personal Details, 2. Trainee Occupation Details, 3. Trainer Details, 4. Upload Documents (current step), and 5. ConfirmDetails. Below the progress bar are 'Previous' and 'Next' navigation buttons. A checklist titled 'Checklist for the documents to be uploaded (Max. Upload Size. 3MB)' lists eight items, each with a 'Browse...' button and an 'Upload file' button. Some items have links to uploaded files and a red 'X' icon. Below the checklist is a 'Qualification Type' dropdown menu set to 'Insurance' and a 'Select File' field with a 'Browse...' button and an 'Upload file' button. At the bottom is a table of uploaded files with columns for 'Document Type', 'Uploaded file', and 'Action'.

Document Type	Uploaded file	Action
Certificate of trainer/surveyor firm	Trainer Acceptance Certificate.pdf(167KB)	X
Insurance	training document.pdf(167KB)	X

At the bottom of the screen are buttons for 'Submit', 'Cancel', 'Save as draft', 'View Submitted Form', 'Print', and 'Clear'.

Figure 34: Upload Documents screen

To Upload Documents:



1. Under **Checklist for documents to be uploaded**, click **Browse** to search for the corresponding document.
2. Click **Upload File** to upload the corresponding document. The name of the uploaded document appears beside the **Upload File** button.

To Upload Degree/Diploma/Training documents:



1. From **Qualification Type** drop-down list, select the qualification.
2. Click **Browse** to search for the document.
3. Click **Upload File**.



1. *If you have selected more than one trainer under trainer selection, then you need to individually upload the Trainer Acceptance Certificate received from all the trainers.*
2. *If the occupation status selected by you is 'Employee' or the employment details are filled, then the NOC document has to be attached mandatorily.*

Confirming Details

In **Confirm Details**, you need to validate and confirm the information submitted by you in the application, in order to proceed with submission.

To view Confirm Details screen:



On the **Upload Documents** screen, click **Next**. The **Confirm Details** screen is displayed.

1 2 3 4 5

Trainee Personal Details Trainee Occupation Details Trainer Details Upload Documents **ConfirmDetails**

Previous Next

Form - III

APPLICATION FOR ENROLLMENT OF TRAINEE SURVEYORS & LOSS ASSESSORS FOR TRAINING
(to be submitted within a fortnight of enrollment)

TRAINEE SURVEYOR'S INFORMATION FORM

1. Name: Ajay Ram Sharma

2. Present Address: 123-East View, Mumbai, Maharashtra, 400027

3. Permanent Address: 123-East View, Mumbai, Maharashtra, 400027

4. Communication:
 Off.:
 Resi.:
 Mobile: +91 9820098200
 Email: ajay@gmail.com
 Alt. Email:

5. Others:
 Date of Birth: 28-03-1991
 Nationality: Indian

6. Occupation Status: Professional

7. Qualification:

Qualification Type	Description	Date of passing
Insurance	Ins24	11-07-2010

8. Whether the applicant is currently employed?: Y
Name of Employer: National Insurance Company Ltd
Nature of Organization: Insurance Company **Nature of work:** Insurance survey related
Period of employment From: 04-07-2011 To: 16-07-2012

9. Whether any other business/profession carried out?: Y
Name of firm: A1 Insurance Broking Services **Nature of business:** Insurance Sales
Designaiton: Insurance Agent

10. Options for departments, in which you wish to be trained and granted surveyors license:

11. Details of Selected Trainer Surveyor / Surveyor Firm:

Name of Trainer	License No./DOE	Department	Category	Present Address	e-Mail ID	Contact No.
DESAI, ASHISH ANANT	39608/20-01-2014	MOTOR	B	"19, TAPASYA ", "VAZIRANAKA, ", "BORIVILI WEST, MUMBAI", Borivali West, Maharashtra, 400091	null,	null

Name: Ajay Ram Sharma
Date : 16-07-2012

Photo

Signature of applicant

I declare that all information provided in this application form is true to the best of my knowledge.

Submit
Cancel
Save as draft
View Submitted Form
Print
Clear

Figure 35: Confirm Details screen

To Submit Form 13 - Trainee Surveyor Enrollment:



1. On the **Confirm Details** screen, select the declaration check box.
2. Click **Submit**. The **User Confirmation Message** dialog box is displayed.

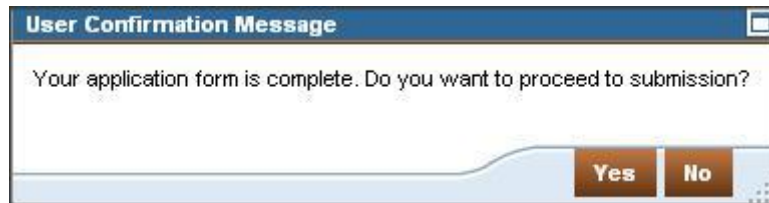


Figure 36: User Confirmation message

3. Click **Yes** to confirm the submission. An **Acknowledgement** dialog box is displayed containing the **Unique Reference Number (URN)**.

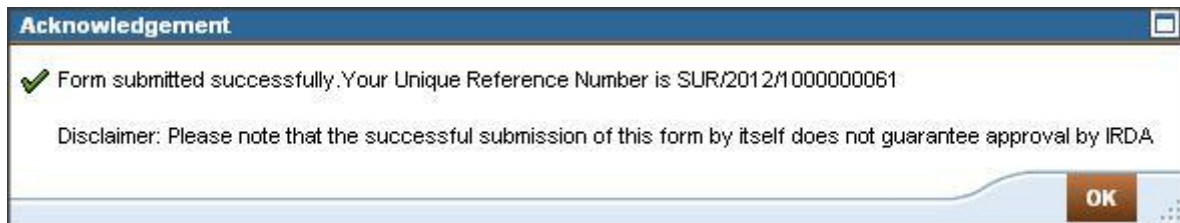


Figure 37: Confirmation message for form submitted successfully

4. Click **OK**.

This completes the enrollment process. After you successfully submit the form, it is sent to IRDA. The action taken by IRDA on the form is conveyed to you in the form of email notifications.

Enrollment Notifications by IRDA

Enrollment Application Approval

If your application is approved, IRDA sends you an email notification stating that your enrollment application has been approved.

Enrollment Application Rejection

If your application is rejected, IRDA sends you an email notification stating that your enrollment application has been rejected.

Clarification/Additional documents required on the submitted application

If IRDA requires any clarification on your submitted application, then it sends you an email notifying that clarification is required from your side. You can view and provide the required clarifications from the [Pending for Clarification](#) tab in the portal.

Closing of Application

When you do not respond to the clarification email sent by IRDA within a month, IRDA sends you an email notifying that it will close your application, as it has not received any response from your side for the clarifications.

Fresh License

Once you successfully pass the examination conducted by III (Insurance Institute of India) and the trainer has submitted your Training Completion Certificate, you can apply for a surveyor license with IRDA.

In order to obtain a new surveyor license, you need to fill and submit an application form to IRDA along with the scanned copies of the supporting documents. IRDA reviews and validates the application and then, approves or rejects it.

To Apply for Fresh License:



1. Click **Trainee** tab.
2. Click **Licensing** tab.



Figure 38: Fresh License option

3. Click **Fresh License**. The **Fresh License Application (Form 1-AF)** is displayed. All the mandatory fields in the form are marked with an asterisk (*).


The Fresh License application process comprises of the following sections:

1. [Trainee Details](#)
2. [Training and Experience](#)
3. [Employee Details](#)
4. [License Details](#)
5. [Upload Documents](#)
6. [Form Preview](#)

The buttons available in the **Fresh License Application (Form 1-AF)** are explained in the following table.

Button	Description
Submit	Click to submit the application form once you have selected the declaration check box.

Button	Description
Cancel	Click to stop the application processing and return to the home page. This action will also clear all the information entered without saving it.
Save as Draft	Click to save all the data entered in the form. You can use this option if you want to submit the form at a later time.
View Submitted Form	Click to view the submitted Fresh License Application (Form 1-AF) in read only mode.
Print	Click to print the submitted Fresh License Application (Form 1-AF).
Clear	Click to clear the data entered.
Previous	Click to go to previous section.
Next	Click to go to the next section.

 The **Licensing** tab is available only after submission of Training Completion Certificate by your trainers.

Trainee Details

The **Trainee Details** screen displays your personal details, address, communication details and qualification details.

To view Trainee Details screen:

1. Click **Trainee** tab.
2. Click **Licensing** tab.
3. Click **Fresh License**. The **Trainee Details** is displayed.
4. Select the enrollment number from **Enrollment Number** drop-down list. The department that you had selected during the time of enrollment is displayed.

Enrollment Number * IRDA/SUR/TS/1099/201

Departments

FIRE MARINECARGO MARINEHULL ENGINEERING MOTOR MISC LOP

1 Trainee Details 2 Training and Experience 3 Employee Details 4 License Details 5 Upload Documents 6 Form Preview

Back **Next**

Checklist

Please ensure that applicant:

- 1) To make online payment of fees (as mentioned in the regulations) through "Net Banking" during application submission.
- 2) Have scanned copies ready of Degree/ Diploma attested by Notary/ Magistrate only.
- 3) To attach scanned copy of affidavit duly notarized against S.No. 3 2 of the application form.
- 4) To Enclose attested and scanned documents in response to Q. No.'s 5, 8, 9, 10 & 11. The answers to which are a must.
- 5) To attach a recent scanned copy of passport size photograph along with the application form.
- 6) Send Physical copies of application and uploaded documents and self addressed envelope of 4.5"x10 with Rs.25 postage stamp to IRDA. These are mandatory for grant of license.

Personal Details

First Name	Ajay	Middle Name	Kumar	Last Name	Sharma
Father/Husband's Name		Date Of Birth	12.12.1991		

Address

Address 1	Paramount Blocks	Address 2	A.P Roads	Address 3	
City/Town/Village	MUMBAI	District	MUMBAI	State	MAHARASHTRA
Country	India	Pin Code	400027		

Communication Details

Phone No.(Resident)		Phone No.(Office)		Mobile No	+91-9823156325
Email-Id	ajay@gmail.com	Email-Id(Optional)		Sole Proprietor (Name if applicable)	

Qualification Details

Qualification Type	Nature - Duration	Passing Date
Academic/Professional	Graduation	29/12/2011

Submit **Cancel** **Save As Draft** **View Submitted Form** **Print** **Clear**

Figure 39: Trainee Details screen

 All the information displayed is in read-only mode

Training and Experience

In **Training and Experience**, you need to mention details about your training, work experience and occupation.

To view Training and Experience Details screen:



On the **Trainee Details** screen, click **Next**. The **Training and Experience** screen is displayed.

Enrollment Number * IRDA/SUR/TS/1099/2012

Departments

FIRE MARINECARGO MARINEHULL ENGINEERING MOTOR MISC LOP

1 Trainee Details 2 **Training and Experience** 3 Employee Details 4 License Details 5 Upload Documents 6 Form Preview

Back **Next**

Practical Training Details

Trainer Name	Department	Category	* Start Date	* End Date	* Areas Covered	* Result	Action
VINOD KUMAR	FIRE	B	11-04-2012	17-04-2013	sdffsd	dfdfdf	✖
VINOD KUMAR	MOTOR	B	11-04-2012	17-04-2013	dtgdg	ergdgdg	✖

Experience Details

Whether the applicant is employed with any insurance company * Yes No

Job Experience in previous employment other than insurance surveyor, if any

Details of other business/employment *

Occupation Details

Occupation Status:

Submit **Cancel** **Save As Draft** **View Submitted Form** **Print** **Clear**

Figure 40: Training and Experience screen

The fields in the **Training and Experience** screen are described in the following table.

Fields	Description
Practical Training Details	
Trainer Surveyor	Displays the name of the trainer.
Department	Displays the department of the trainee.
Category	Displays the category of the trainee.
Trainer Name	Select the name of the trainer.
Practical Training Details	
Start Date	Select the start date of the training.
End date	Select the completion date of the training.
Areas Covered	Enter the areas covered under selected training department.
Result	Enter the result details.
Action	Click to discard the data entered in the field.
Experience Details	
Whether the applicant is employed with any insurance company	Select Yes or No.
Job Experience in previous employment other than insurance surveyor, if any	Enter the details of your previous work experience, if any.
Details of other business/employment	Enter the details of other business/employment.
Occupation Details	
Occupation Status	Displays your occupation status.

Employee Details

In **Employee Details**, you will see the employment details and other business details entered during enrollment process in [Form 13 - Trainee Surveyor Enrollment](#).

To view Employee Details screen:



On the **Training and Experience** screen, click **Next**. The **Employee Details** screen is displayed.

Enrollment Number IRDA/SUR/TS/1099/2012

Departments

FIRE MARINECARGO MARINEHULL ENGINEERING MOTOR MISC LOP

1 2 3 4 5 6

Trainee Details Training and Experience **Employee Details** License Details Upload Documents Form Preview

Back Next

Employment Details

Employer Name	Nature Of Organisation	Nature Of Work	Period of employment from date	Period of employment to date
Alpha Insurers	Insurance Company	Insurance survey related	09-10-2012	07-11-2012

Whether applicant is currently employed * Yes No

Name Of Employer * Alpha Insurers Nature Of Work * Insurance Company Nature Of Organization * PSU

Period of employment from date * 09-10-2012 Period of employment to date * 07-11-2012

Other Business/ Profession Details

Name Of Firm	Designation	Nature Of Business
Insurance Ltd	Consultant	Sales

Any Changes in Other Business/ Profession Details, Please Specify * Yes No

Name Of Firm * Insurance Ltd Designation * Consultant Nature Of Business * Sales

Submit Cancel Save As Draft View Submitted Form Print Clear

Figure 41: Employee Details screen

The fields in the **Employee Details** screen are described in the following table.

Field	Description
Employment Details	
Whether Applicant is currently employed	Select Yes or No. If Yes, enter the present employment details in the corresponding fields.
Name of Employer	Enter the name of your employer.
Nature of Organization	Enter the nature of your organization.
Nature of Work	Enter the nature of the work done.
Period of Employment from date	Select the start date of the employment.
Period of Employment to date	Select the end date of the employment.
Other Business/Profession Details	
Any Changes in Other Business/Profession Details, Please Specify	Select Yes or No. If Yes, enter the present business/profession details in the corresponding fields.
Name of firm	Enter the name of the firm.
Designation	Enter the designation held in the firm.
Nature of business	Enter the type of business carried out by the firm.

License Details

In **License Details**, you need to enter the details of the previous surveyor and loss assessor license held by you, if any.

To view License Details screen:



On **Employee Details** screen, click **Next**. The **License Details** screen is displayed.

Enrollment Number

Departments

FIRE
 MARINECARGO
 MARINEHULL
 ENGINEERING
 MOTOR
 MISC
 LOP

1 —
 2 —
 3 —
 4 —
 5 —
 6

Trainee Details
 Training and Experience
 Employee Details
 License Details
 Upload Documents
 Form Preview

Back **Next**

License details

Have you ever had a license to act as a surveyor and loss assessor? *

Yes
 No

SLA No. *
 Date Of Issue
 Date of expiry

Submit
 Cancel
 Save As Draft
 View Submitted Form
 Print
 Clear

Figure 42: License Details screen

The field in the **License Details** screen is described in the following table.

Field	Description
Licensing Details	
Have you ever held a licence to act as a surveyor and loss assessor	Select Yes or No. If Yes, enter SLA No. to display additional information. The format of the SLA Number is as follows: IRDA/<Type of surveyor>/SR-<serial number>/<Date of license expiry>. INDV will be used as surveyor type for Individual surveyor applications.

Upload Documents

In **Upload Documents**, you need to upload the necessary documents for the successful submission of the Fresh License application.

To view Upload Documents screen:



On the **License Details** screen, click **Next**. The **Upload Document** screen is displayed.

Enrollment Number IRDA/SUR/TS/1099/2012

Departments

FIRE MARINECARGO MARINEHULL ENGINEERING MOTOR MISC LOP

1 Trainee Details 2 Training and Experience 3 Employee Details 4 License Details 5 **Upload Documents** 6 Form Preview

Back **Next**

Notes

1. The attention of the applicant is drawn to Section 102 of the Insurance Act 1938, which provides that whoever in any document required for the purpose of any of the provisions of the Act, rules or regulations made thereunder, fails to furnish the same shall be liable to a penalty not exceeding Rs. 5 lakhs for each such failure and punishable with fine.
2. An individual can apply for only one licence, which will entitle him to act as a Surveyor and Loss Assessor for any insurer.
3. Any correction or alteration made in answer to the questions in the application should be initiated by the applicant.
4. An applicant must be atleast 18 (eighteen) years of age on the date of submission of the application. In the case of any applicant declaring him as 18 years the exact date of birth of falling in the year or birth should be stated against item 4 of the application. If require the applicant shall furnish proof age.
5. Only category C License will be allotted to individual applying for fresh license and fees payable is Rs 5000.
6. An email notification will be sent to the applicant on successful submission of the application form.
7. Any change in the information submitted to the authority must be informed to the authority within 15 days from date of the change.

Declaration

I hereby declare

- i) I have not been found to be of unsound mind by a Court of competent jurisdiction.
- ii) I have not been found guilty of criminal misappropriation or criminal breach of trust or cheating or forgery or of abetment or attempt to commit any such offence by a Court of Competent Jurisdiction.
- iii) I have not been found guilty of or to have knowingly participated in or conceived at any fraud/dishonesty or misrepresentation against an insurer or an insured in the course of any judicial proceeding relating to any policy of insurance or the winding up of an insurance company.
- iv) I shall not violate the code of conduct specified by the regulations made by the Authority.
- v) I possess the requisite qualifications and practical training as specified by the regulations made by the Authority.
- vi) I have passed such examination as specified by the regulations made by the Authority.

Check list for documents to be attached

Affidavit as stated in section 42D(.pdf,.doc) *	<input type="text"/> Browse...	Upload File	Affidavit.pdf	✗
Training Completion Certificate (If applicable)(.pdf,.doc) *	<input type="text"/> Browse...	Upload File	Training Completion Certificate.pdf	✗
Degree/ Diploma certificate(.pdf,.doc) *	<input type="text"/> Browse...	Upload File	Diploma Certificate.pdf	✗
Experience Certificate(.pdf,.doc)	<input type="text"/> Browse...	Upload File	Experience Certificate.pdf	✗
NOC from employer(.pdf,.doc) *	<input type="text"/> Browse...	Upload File	NOC From Employer.pdf	✗
Passport size photo(.jpg) *	<input type="text"/> Browse...	Upload File	photo.jpg	✗
Photo ID (.jpg) *	<input type="text"/> Browse...	Upload File	photo.jpg	✗
Address Proof (.pdf,.doc)	<input type="text"/> Browse...	Upload File	Address Proof.pdf	✗
Scanned Signature(.jpg) *	<input type="text"/> Browse...	Upload file	scanned sign.jpg	✗

Submit **Cancel** **Save As Draft** **View Submitted Form** **Print** **Clear**


Figure 43: Upload Documents screen

To Upload Documents:



1. Under **Checklist for documents to be attached**, click **Browse** to search for the corresponding document.

2. Click **Upload File** to upload the corresponding document. The name of the uploaded document appears beside the **Upload File** button.

 *If the employment details are filled , then the NOC document has to be attached mandatorily.*

Form Preview

In **Form Preview**, validate and confirm the information submitted by you in the application. After validating the information, you need to make the required payment for obtaining the Fresh License.

To view Form Preview screen:



On the **Upload Documents** screen, click. **Next**. The **Form Preview** screen is displayed.

Enrollment Number IRDA/SUR/TS/1099/201

Departments

FIRE MARINECARGO MARINEHULL ENGINEERING MOTOR MISC LOP

1
2
3
4
5
6

Trainee Details
Training and Experience
Employee Details
License Details
Upload Documents
Form Preview

Back **Next**

SCHEDULE


INSURANCE REGULATORY AND DEVELOPMENT AUTHORITY
FORM - IRDA -1 - AF

APPLICATION FOR A LICENCE TO ACT AS SURVEYOR AND LOSS ASSESSOR

To

Insurance Regulatory and Development Authority
5th Floor, Parishram Bhavan,
Basheerbagh , Hyderabad - 500004
Telephone no:66626466/67

Dear Sir,
I request that a licence to act as a Surveyor and Loss Assessor may be granted to me for the Following classes

Department	Photo
<p>Name</p> <p>Name Ajay Sharma</p> <p>Father / Husband Name</p>	
<p>Present Address</p> <p>Address Paramount Blocks, A.P Roads, MUMBAI, MUMBAI - 400027, MAHARASHTRA, India,</p>	

Communication Details

Date Of Birth	12.12.1991	Email Id	ajay@gmail.com	Email Id Optional	
Mobile No	+91-9823156325	Phone No. (Office)		Phone No (Resident)	
Sole Proprietor					

Qualification Details

Qualification Type	Description	Passing Date
Academic/Professional	Graduation	29/12/2011

Practical Training Details

Surveyor's/ Surv...	Department	Category	Trainer Name	Start Date	End Date	Areas Covered	Result
AJSH1212001	FIRE	C	NARENDRA KU H...	06-09-2012	06-11-2012	Fire	Pass

Occupation Status Service

Experience Details

Whether the applicant is employed with any insurance company Yes

Details of other business/ employment

Job Experience in previous employment other than insurance surveyor, if any Sales

Employment Details

Name of Employer	Nature of Organization	Nature of Work	From Date	To Date
Alpha Insurers	Insurance Company	Insurance survey related	09-10-2012	07-11-2012

Whether applicant is currently employed? Yes

Current Employment Details

Name of employer	Alpha Insurers	Nature of work	Insurance Company	Nature of organization	PSU
Start Date	09-10-2012	End Date	07-11-2012		

Other Business/Profession Details

Name of Firm	Designation	Nature of Business
Insurance Ltd	Consultant	Sales


Whether applicant has any other business/profession details? Yes

Name of firm Insurance Ltd Designation Consultant Nature of business Sales

Have you ever had a license to act as a surveyor and loss assessor? No

Name Ajay Sharma

Date 07-11-2012


Signature of applicant

I solemnly declare that the particulars given above are true to the best of my knowledge and belief.

Submit
Cancel
Save As Draft
View Submitted Form
Print
Clear

Figure 44: Form Preview screen

To submit Fresh License Application:



1. On the **Form Preview** screen, select the declaration check box.
2. Click **Submit**. The **User Confirmation Message** dialog box is displayed.

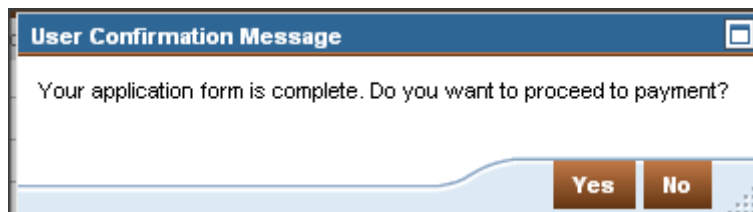


Figure 45: User confirmation message for license application

3. Click **Yes** to proceed to payment. The **Make Payment** screen is displayed.

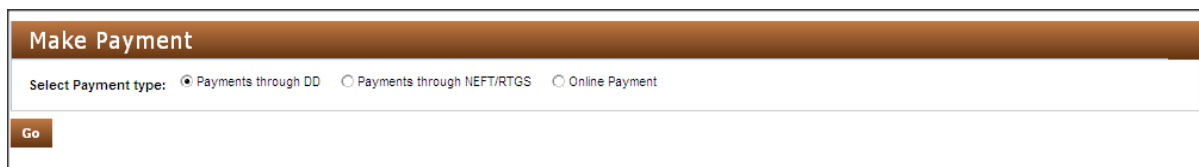


Figure 46: Make Payment screen

4. Select the desired payment type and click **Go** to make payment through that type. The different payment types are explained below.
 - **Payment through DD** - Select this payment type if you want to make your payment through demand draft. You need to create the demand draft first and then enter its details in this payment type.

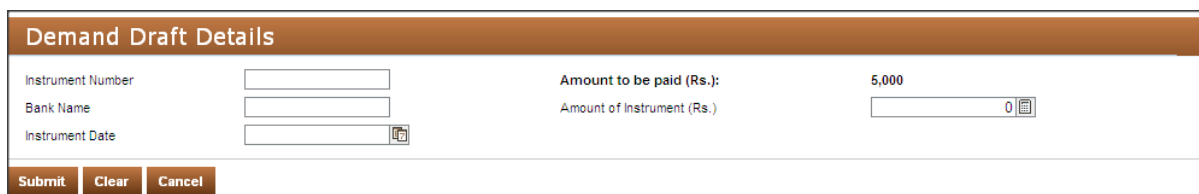


Figure 47: Demand Draft Details screen

The fields in this payment type are explained in the following table.

Field	Description
Instrument number	Enter the demand draft number.
Amount to be paid (Rs.)	The amount payable is displayed by default.
Bank Name	Enter the name of the bank from which you created the demand draft.

Field	Description
Amount of Instrument (Rs.)	Enter the amount of the demand draft.
Instrument Date	Select the date when you created the demand draft.

- Payment through NEFT/RTGS** - Select this payment type if you want to make your payment through NEFT/RTGS. For this payment type, you need to make payment to IRDA through NEFT/RTGS and then enter the payment details in this payment type.

NEFT/RTGS Details

Acknowledgement No.	<input type="text"/>	Amount to be paid (Rs.) :	5,000
Bank Name	<input type="text"/>	Enter your IFSC Code	<input type="text"/>
Date of Payment:	<input type="text"/>	Enter your Account Number	<input type="text"/>
Amount of Payment (Rs.)	<input type="text"/> 0		

Submit
Clear
Cancel

Figure 48: NEFT/RTGS Details screen

The fields in this payment type are explained in the following table.

Field	Description
Acknowledgement No.	Enter the acknowledgement number received after making the online payment.
Amount to be paid (Rs.)	The amount payable is displayed by default.
Bank Name	Enter the name of the bank through which you made the payment.
Enter your IFSC code	Enter the IFSC code of your bank branch.
Date of Payment	Select the date when you made the payment.
Enter your Account Number	Enter your bank account number.
Amount of Payment (Rs.)	Enter the amount of the payment made.

- Online Payment** - Select this payment type if you want to make the payment through net banking. For this payment type, a new window will open where you will need to enter the required details and make the payment.

5. Enter the necessary details for the selected payment type and click **Submit**. An **Acknowledgement** dialog box is displayed containing the **Unique Reference Number (URN)**.

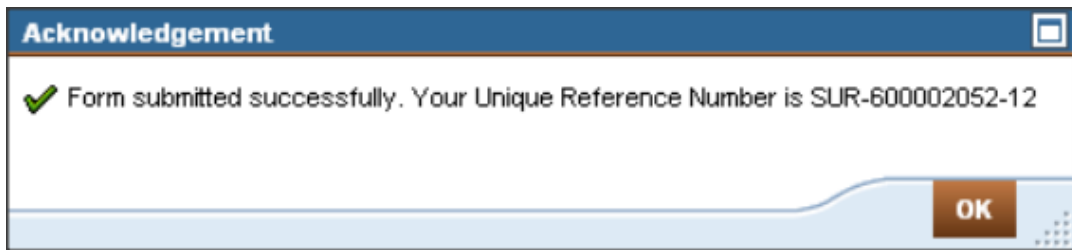


Figure 49: Confirmation message for form submitted successfully

6. Click **OK**.

This completes the Fresh License application process. After you successfully submit the form and make the payment, it is sent to IRDA. The action taken by IRDA on the form is conveyed to you in the form of email notifications.

License Confirmation Notification by IRDA

Approval of License Application

When your Fresh License application request has been accepted, IRDA sends you an email notification stating approval of license application.

Rejection of License Application

When your Fresh License request has been rejected, IRDA sends you an email notification stating the reason for rejection.

Clarification/Additional documents required on the submitted application

If IRDA requires any clarification on your submitted application, then it sends you an email notifying that clarification is required from your side. You can view and provide the required clarifications from the [Pending for Clarification](#) tab in the portal.

Closing of Application

When you do not respond to the clarification email sent by IRDA within a month, IRDA sends you an email notifying that it will close your application, as it has not received any response from your side for the clarifications.

Approval Withdrawn for which license is yet to be issued

IRDA has the authority to withdraw approval from the approved application for which license is not issued. In such cases, you will receive an email notification stating that approval on your license application has been withdrawn.

View Application Status

Whenever you submit any application to IRDA, it follows a defined process for application processing. Depending on the action taken by IRDA on the application, the status of the application keeps changing. Through **View Application Status** you can view the status of the Form - 13 application or the License application.

To View Applications Status:



1. Click **Trainee** tab.
2. Click **View Application Status** tab. The **View Application Status** screen is displayed.

User Profile		Trainee			
Surveyor Training & Enrollment		View Application Status		Pending for clarification	
Applications					
Show All					
URN	Applicant Name	Date of Application	Application Status	ApplicationType	
SUR/2012/1000000061	Ajay Sharma	13-07-2012	Application Submitted	Enrollment	

Figure 50: View Application Status screen

3. The status of the application is displayed in the **Application Status** column. The different statuses of the application are explained in the following table.

Status	Stage
Application submitted	Form- 13 or Fresh License application submitted by Trainee
Under process	Application under processing
Application approved	Post approval of application by IRDA
Pending for Clarification	Additional information/documents required by IRDA on the submitted application
Application closed	Post closure of application by IRDA
Application rejected	Post rejection of application by IRDA
License Issued	Post license issuance by IRDA
Approval Withdrawn	Post withdraw of approval by IRDA from approved application

Pending for Clarification

Once you submit the enrollment or Fresh License application, IRDA reviews the application. If additional information or documents are required after the submission of the application, IRDA notifies you through an email.

Clarification email:

IRDA, during the enrollment or license stage, may seek for additional documents for processing your request. In such a stage, you will receive a clarification email from IRDA. After that, you will have to log into BAP portal to provide additional documents and comments.

To view Pending for Clarifications:



1. Click **Trainee** tab.
2. Click **Pending for clarification** tab. The list of the Unique Reference Numbers (URN) awaiting clarification is displayed.

User Profile		Trainee	
Surveyor Training & Enrollment		View Application Status	
Pending for clarification			
URN	Application Submitted Date	Review Date	
SUR/2012/1000000061	13-07-2012	16-07-2012	

Figure 51: Pending for clarification screen

3. Click the Unique Reference Number (URN) to view the pending clarifications for that application. The application screen is displayed. The application screen is displayed. The clarification required by IRDA is displayed in **Remarks by IRDA** field.

Form - III
APPLICATION FOR ENROLLMENT OF TRAINEE SURVEYORS & LOSS ASSESSORS FOR TRAINING
(to be submitted within a fortnight of enrollment)

TRAINEE SURVEYOR'S INFORMATION FORM

1. Name: Ajay Ram Sharma

2. Present Address: 123-East View, Mumbai, Maharashtra, 400027


3. Permanent Address: 123-East View, Mumbai, Maharashtra, 400027

4. Communication:
 Off.:
 Resi.:
 Mobile: +91 9820098200
 Email: ajay@gmail.com
 Alt. Email:

5. Others:
 Date of Birth: 28-03-1991
 Nationality: Indian

6. Occupation Status: Professional

Photo



7. Qualification:

Qualification Type	Description	Date of passing
Insurance	Ins24	11-07-2010

8. Whether the applicant is currently employed?: Y
Name of Employer: National Insurance Company Ltd
Nature of Organization: Insurance Company **Nature of work:** Insurance survey related
Period of employment From: 04-07-2011 **To:** 16-07-2012


9. Whether any other business/profession carried out?: Y
Name of firm: A1 Insurance Broking Services **Nature of business:** Insurance Sales
Designation: Insurance Agent

10. Options for departments in which you wish to be trained and granted surveyors license:
 1. MOTOR

11. Details of Selected Trainer Surveyor / Surveyor Firm:

Name of Trainer	License No./DOE	Department	Category	Present Address	e-Mail ID	Contact No.
DESAI, ASHISH ANANT	39608/20-01-2014	MOTOR	B	"19, TAPASYA ", "VAZIRANAKA ", "BORIVILI WEST, MUMBAI", Borivali West, Maharashtra, 400091	null,	null

Name: Ajay Ram Sharma
Date : 13-07-2012


Signature of applicant

[View Documents](#)

[View Application](#)

Remarks by IRDA: need more clarity from the applicant

Remarks by Applicant *: more documents added

Select file: Attachment details *:

Document Required	Uploaded file	Action
Training documents added	training document.pdf	✘

I declare that all information provided in this application form is true to the best of my knowledge.

Figure 52: Application seeking clarification

4. In **Remarks by Applicant** field, provide additional information required by IRDA.
5. Attach additional documents if required by IRDA.
6. Click **Submit**. The **User Confirmation Message** dialog box is displayed.

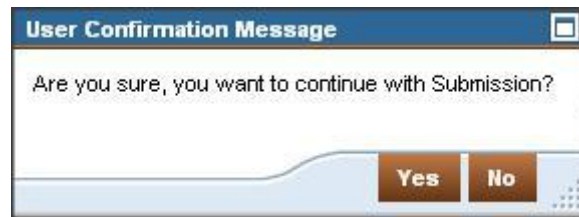


Figure 53: User Confirmation message for Pending for clarification

7. Click **Yes**. An **Acknowledgement dialog** box is displayed notifying that the clarification is submitted.

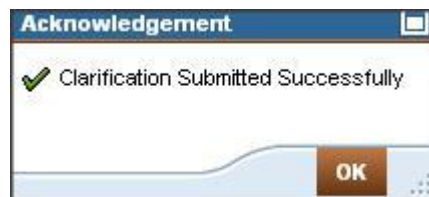


Figure 54: Clarification submitted confirmation message

8. Click **OK**.

Once you provide the required clarifications, IRDA reviews them and then updates the status of the application.

Reminder email:

IRDA sends you a reminder email when it does not receive any response within seven business days of sending the clarification email. IRDA sends you three reminder emails after sending the clarification email.

Closure of Application email:

If IRDA does not receive any response from you after sending the clarification email, it closes the application. On closure of the application, IRDA notifies you through email.

Frequently Asked Questions

1. Do Individual Surveyors have to register again to become a Corporate Surveyor?

Yes. Corporate Surveyors are required to create a new user account by selecting Corporate during the registration.

2. What happens if my user ID is deleted?

If your account is deleted, then you have to re-register yourself in the portal.

3. How do I update my present address?

You will be able to update your contact details such as Email Id, Alternate Email ID, Phone Numbers and Fax numbers. However, you do not have permission to change the present address until your Fresh License is issued. Once it is done, you can change your address through the Modification/Upgradation of license tab.

4. What is the difference between View submitted request and View application status?

- In **View submitted request**, you can check the status of the training request sent to the trainer (Approved, Submitted, Rejected).
- In **View application status**, you can check the status of enrollment or Fresh License application sent to IRDA for processing.

View submitted Request involves communication between trainer and trainee, while **View application status** involves communication between IRDA and trainee.

5. What is the purpose of link provided for Pending for Clarification?

During the processing of Form 13 - Trainee Surveyor Enrollment or Fresh License Application (Form 1-AF), IRDA might require some additional information or documents to supplement the application. IRDA does not process the form until you submit the required documents. You can provide additional information/documents through this link.

6. How can I print the Trainer Acceptance Certificate?

When the trainer approves your request, click **View Submitted Request**, and then select the application that you want to view and click **View** to view the **Trainer Acceptance Certificate**. You can [print](#) the certificate from here.

7. How do you upload more than one Trainee Acceptance Certificate?

In Form 13 - Trainee Surveyor Enrollment, you are allowed to upload certificates equivalent to number of trainers selected for training. In **Upload Trainee Certificate**, click **Browse** to select the file and then click **Upload**.

8. What am I supposed to do after my user account gets locked?

You are supposed to have an offline communication with IRDA regarding this issue after which IRDA will reset your password and you will be able to access your account.

9. What is the purpose of 'View Application Status' tab?

Under View Application Status tab you can view the status of various applications which are submitted by you. Applications will be sorted by URN.

10. How do I take training under a surveyor?

Click on Trainer Selection, Create New Request and Select a Trainer. After trainer has accepted your training request fill Form 13.

11. How many trainers can I select?

You can select maximum four trainers under whom you can take training.

12. How do I get a license?

After you get a Training Completion Certificate from your respective trainer you can apply for a license by clicking on New License under Licensing Tab.

13. How will I be informed and updated about various actions that are taken on my application?

IRDA will inform you by sending a notification through email.

14. How do I update my details if there is any change after User Registration?

Login with your credentials and go to User Profile. Click on Update User Profile and make the necessary changes.

Glossary

A

Account locked

A scenario in which a user has made three unsuccessful attempts to login to the portal.

C

Clarification email

A reference number generated by the system for Form 13 - Trainee Surveyor Enrollment approved by IRDA.

Closure of application

An activity performed by IRDA when users do not respond to emails seeking clarification within the required time line.

E

Enrollment Number

A reference number generated by the system for Form 13 - Trainee Surveyor Enrollment approved by IRDA.

Enrollment rejected

An event when a Form 13 - Trainee Surveyor Enrollment is rejected by IRDA. The cause of rejection is sent through email. For reapplying for enrollment, you need to communicate offline with IRDA.

F

Form - 13 Trainee Surveyor Enrollment

An enrollment form submitted to IRDA to enrol for surveyor training.

I

Insurance Institute of India

Insurance Institute of India conducts training and exams for insurance professionals in India. Its objective is to promote insurance education and training in the country. It ensures quality in the profession of surveyors by regular upgradation of professional excellence through training programs and seminars.

IRDA

Insurance Regulatory and Development Authority of India is the apex body that regulates the insurance industry in India.

L**Licensed surveyor**

An individual surveyor who has undergone mandatory training and successfully cleared the surveyor examination conducted by III and obtained license from IRDA.

N**New request**

A request made by the user when they select the department and trainer for their training.

P**Pending clarification**

Applicants need to provide clarifications and attach additional documents as required by IRDA during application processing.

R**Reminder email**

A set of emails sent by IRDA to the users on their registered email ID when any action is required from them.

Retrieve credentials

A process through which the user can retrieve their login credentials by entering mandatory information.

S**Surveyor**

An individual hired by insurance companies to assess the actual loss arising from a certain event for settlement of claims.

SLA Number

A license number issued by IRDA upon successfully becoming an authorised surveyor. The format of the SLA Number is as follows:

IRDA/<Type of surveyor>/SR-<serial number>/<Date of license expiry>

Surveyor License Number Expiry Date

A defined length of time for surveyors to operate before license becomes non-functional.

SSLC

SSLC (Secondary School Leaving Certificate) is the certificate received after completion of secondary schooling (10th Grade).

T**Trainer Acceptance Certificate**

The certificate that is displayed to the trainee in **View Submitted Requests** when the Trainer has accepted the training request. You can print this certificate if required. You need to submit this certificate while submitting Fresh License application.

Trainer selection

Enables users to select trainer within their state for the selected department to undergo training.

Trainer surveyor

A surveyor of Category A or B who provides training to the trainee.

U**Unique Reference Number**

The unique reference number that is generated when users successfully submit any application to IRDA.

Error Handling

Application	Scenario	Message	Type
Training Enrolment Form	Data not entered in Input fields	Field is Mandatory	Input field
	Data entered is in wrong format	Field Cannot be Numeric	Input field
	Value selected for month is incorrect	Field should have a numeric value	Input field
	Value selected for month is incorrect	Value should be between 1 to 12	Dropdown field
	Date selected is future date	Cannot be current or future date, please enter a valid date	Date/Calendar field
	Uploading documents	Extension is not allowed, please attach file with extension file for an .PDF or .JPG.	File upload
	Uploading documents	File size is greater than 3 MB , please upload a file less than 3 MB	File upload
Trainer selection	Data not entered in Input fields	Field is Mandatory	Input field
Training completion certificate	Data not entered in Input fields	Field is Mandatory	Input field
	Data entered is in wrong format	Field cannot be Numeric	Input field
	Data entered is in wrong format	Field cannot be string	Input field
	Invalid date selection	To date cannot be before from date	Date/Calendar field
	Invalid date selection	Invalid date	Date/Calendar field
Fresh License	Data not entered in Input fields	Field is mandatory.	Input field
	Data entered is	Field Cannot be	Input field

	in wrong format	numeric	
	Data entered is in wrong format	Field should have a 6 digits numeric value.	Input field
	Date selection	Cannot be a date from future.	Date/Calendar field
	Date selection	Date cannot be past or present date	Date/Calendar field
	Date selection	From date cannot be after to date	Date/Calendar field
	data entry validations	Field should contain at most 30 characters.	Input field
	Uploading documents	File size is greater than 3 MB , please upload a file less than 3 MB	File upload
	Uploading documents	Extension is not allowed, please attach an <> extension file for <>.	File upload
	Date selection	Practical Training Details: difference between from date and end date should not be more than 12 months	Date/Calendar field
	Enter amount	Entered refund amount is greater than the amount paid	Input field
	Add director details	Enter at most two director details	Table data
Pending for Clarification	Data not entered in Input fields	Field is Mandatory	Input field

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