

Customer Login Process Flow (Life Assures is same as Proposer)

1. Login Screen-

The screenshot shows the login interface of the HDFC Life Sales Diary Partner Portal. The browser address bar displays the URL: `salesdiaryuat.hdfclife.com/TEBTParPortal/portal.do?_pageid=sec_loginPage&_portalid=sec`. The page header includes the HDFC Life logo with the tagline "Sarvatha ke jayo!" and the text "Sales Diary Partner Portal".

The central "Login" form contains the following fields and options:

- UserID/License No:
- Password:
- Captcha Code: (displaying "Yr909") with a refresh icon.
- Verify Captcha:
- [Forgot password](#)
-
- (OR)
- [OTP Login Page](#)
- [Employee Code Login](#)
- [Quick Quote Calculator](#)

A red note at the bottom of the form states: "Note : As per Supreme Court Verdict, Aadhaar based KYC is disabled and is not available until further notice."

2. After entering credentials

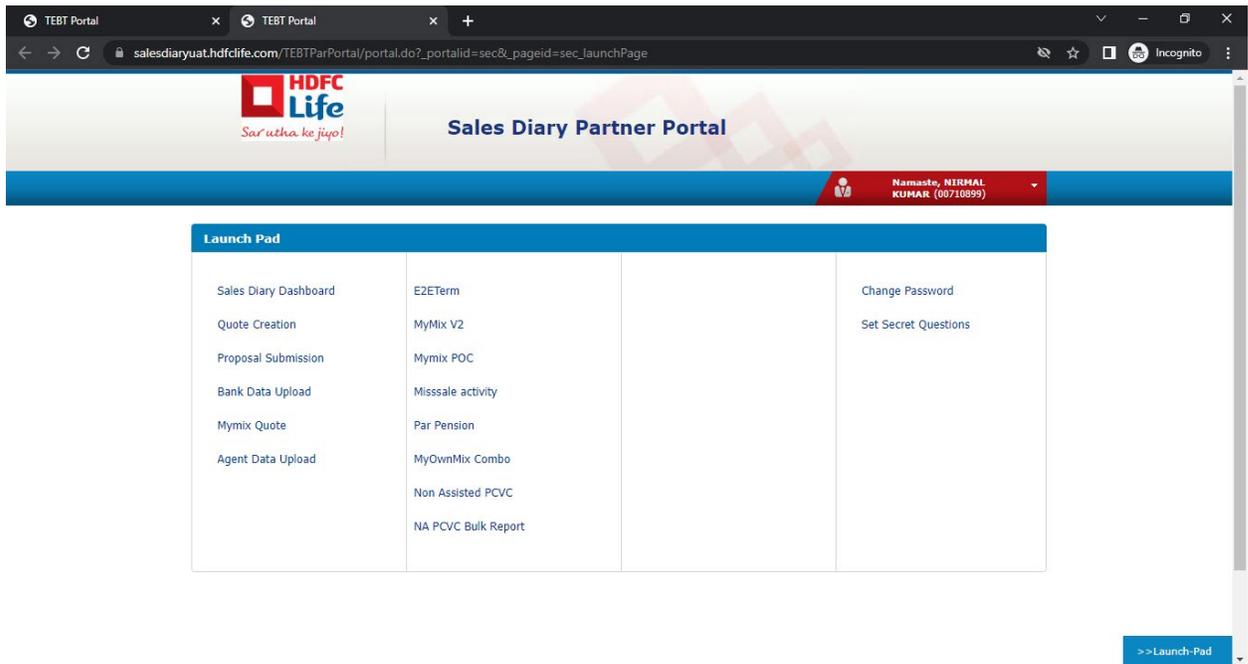
The screenshot shows the home page of the HDFC Life Sales Diary Partner Portal after successful login. The browser address bar displays the URL: `salesdiaryuat.hdfclife.com/TEBTParPortal/portal.do?_portalid=sec&_pageid=sec_homePage`. The user's name, "Namaste, NIRHAL KUMAR (00710099)", is displayed in the top right corner.

The page is divided into two main sections:

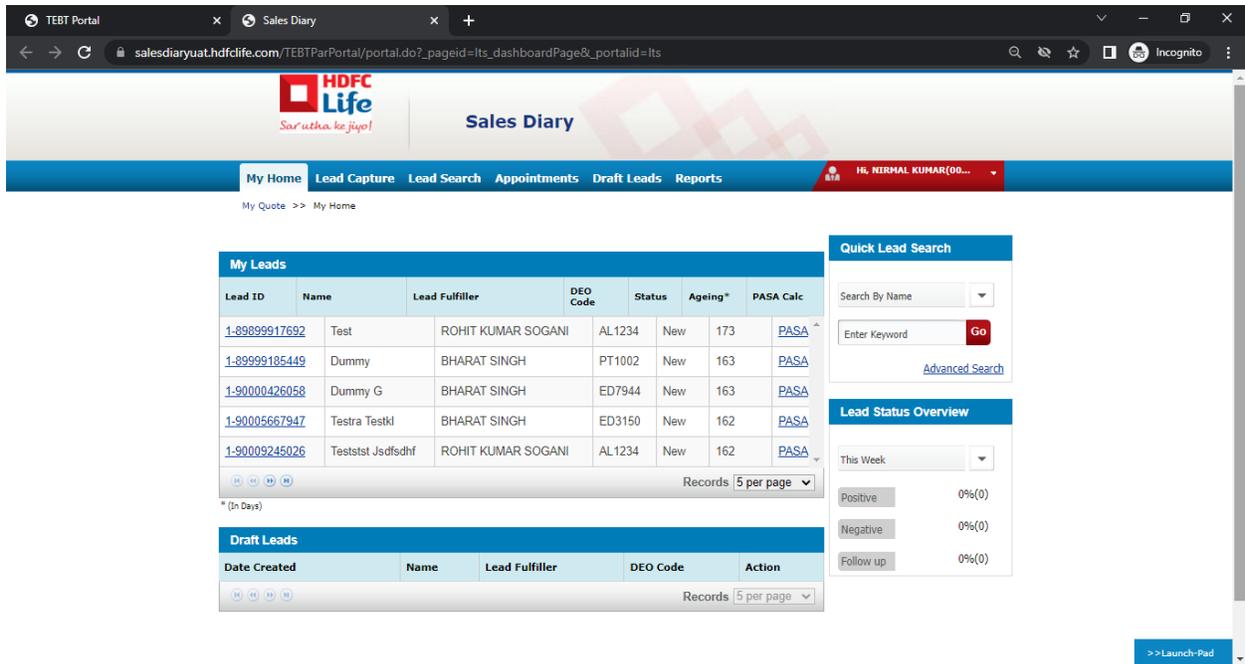
- Pre Sales:**
 - MYmix:** Application to generate rich text illustration and to combine existing HDFC Life's products into unique combo solutions.
 - PASA Calculator:** Check real time PASA offers and check for corresponding FR requirements including medicals.
- Form Filling:**
 - TEBT:** Link to on-board customers i.e. create leads, conduct suitability, generate quotes, fill application form, upload documents, etc.
 - INSTAInsure:** Generate quick, personalised and pre-approved insurance offers. This app enable users for a short purchase journey and quicker conversion.

At the bottom left, there is a **LifeEasy** section with the text: "Link to sell Term products with a simple and better user experience". A blue button labeled ">>Launch-Pad" is located at the bottom right.

3. Landing page



4. Click on Sales Dairy dashboard



5. Click on Lead Capture

TEBT Portal x Sales Diary x +

salesdiaryuat.hdfclife.com/TEBTParPortal/portal.do?_pageid=Its_dashboardPage&_portalid=Its#

HDFC Life
Sar utha ke jyo!

Sales Diary

My Home **Lead Capture** Lead Search Appointments Draft Leads Reports Hi, NIRMAL KUMAR(00...

My Quote >> Lead Capture

Lead Header Personal Info Contact Info Sales Activities Additional Info **Lead ID:** * mandatory fields 0% Complete

Customer Details

First Name: * Last Name: Gender: *

Date of Birth: * OR Age: Contact No: *

Preferred Language: *

Cell Residence

Source Details

Lead Type: * Marketing Lead:

Lead Details

Lead ID: Date Created: Priority Lead:

Channel Partner: * Lead Channel: * Lead Sub Channel: *

Lead Status: *

>> Launch-Pad

6. Enter Lead Details

TEBT Portal x Sales Diary x +

salesdiaryuat.hdfclife.com/TEBTParPortal/portal.do?_pageid=Its_dashboardPage&_portalid=Its#

HDFC Life
Sar utha ke jyo!

Sales Diary

My Home **Lead Capture** Lead Search Appointments Draft Leads Reports Hi, TEJAS HARIYA(00...

My Home >> Lead Capture

Lead Header Personal Info Contact Info Sales Activities Additional Info **Lead ID:** * mandatory fields 0% Complete

Customer Details

First Name: * Last Name: Gender: *

Date of Birth: * OR Age: Contact No: *

Preferred Language: *

Cust id:

Cust Mob no:

Cell Residence

Get Bank Data

Source Details

Lead Type: * Marketing Lead:

Lead Details

Lead ID: Date Created: Priority Lead:

Channel Partner: * Lead Channel: * Lead Sub Channel: *

Lead Status: *

>> Launch-Pad

TEBT Portal | Sales Diary | salesdiaryuat.hdfclife.com/TEBTParPortal/portal.do?_pageid=Its_dashboardPage&_portalid=Its#

Source Details

Lead Type: * Default | Marketing Lead:

Lead Details

Lead ID: | Date Created: | Priority Lead:
 Channel Partner: * Broca | Lead Channel: * Broca | Lead Sub Channel: * Edelweiss
 Lead Status: * New

Allocation Details

SP Code: * 00955254/TEJAS HAR | Allocation Logic: * Manual Allocation | DEO Code: * ED7944/ANJANI PANI
 Lead Fulfiller: * 159488/BHARAT SINK

Other Details

Branch Code: * ED00

Opportunities (Anyone of the following is mandatory)

Customer Need: Children Plan Health Investment Protection
 Retirement Savings Service

Product Platform: Combo Conventional Health/Protection ULIP

[-> Launch-Pad](#)

TEBT Portal | Sales Diary | salesdiaryuat.hdfclife.com/TEBTParPortal/portal.do?_pageid=Its_dashboardPage&_portalid=Its#

SP Code: 00955254/TEJAS HAR | Allocation Logic: Manual Allocation | DEO Code: ED7944/ANJANI PANI
 Lead Fulfiller: 159488/BHARAT SINK

Other Details

Branch Code: * ED00

Opportunities (Anyone of the following is mandatory)

Customer Need: Children Plan Health Investment Protection
 Retirement Savings Service

Product Platform: Combo Conventional Health/Protection ULIP

Product Available:

- HDFC Life Classic One-UXR
- HDFC Life Classic One-UXO
- HDFC Life Classic One-UXL
- HDFC Life Classic One-UXB
- HDFC Life Classic One-UXA
- HDFC Life Wealth Elite-UXC

Product Discussed:

- HDFC Life Sanchay Plus (Sp)-EAB

Note: Please be careful in sharing the Mobile no., email id, city/district & pincode. It will be used for PCVC and communication (form and illustration). Cannot be changed later. You will have to submit new form if you give incorrect information.

[Find Duplicate](#) [Save as Draft](#) [Generate Lead](#)

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[-> Launch-Pad](#)

7. Click Generate Lead

TEBT Portal | Sales Diary

salesdiaryuat.hdfclife.com/TEBTParPortal/portal.do?_pageid=Its_dashboardPage8_portalid=Its#

HDFC Life
Sar utha ke jyo!

Sales Diary

My Home | **Lead Capture** | Lead Search | Appointments | Draft Leads | Reports

Hi, TEJAS HARIYA(00...

My Home >> Lead Capture

Lead Generated Successfully.

Lead ID: 1-91526402440
45% Completed

Lead Header | Personal Info | Contact Info | Sales Activities | Additional Info

Customer Details

First Name: * Harman | Last Name: Joshi | Gender: * Male

Date of Birth: * 01/01/1990 | Age: 32 | Contact No: * 91 7977854421

Preferred Language: * English | Cust id: | Cust Mob no: | Cell Residence

Source Details

Lead Type: * Default | Marketing Lead:

Lead Details

Lead ID: | Date Created: | Priority Lead: | [Launch-Pad](#)

TEBT Portal | Sales Diary

salesdiaryuat.hdfclife.com/TEBTParPortal/portal.do?_pageid=Its_dashboardPage8_portalid=Its#

Lead Fulfiller: * 159488/BHARAT SINK

Other Details

Branch Code: * ED00

Opportunities (Anyone of the following is mandatory)

Customer Need: Children Plan Health Investment Protection Retirement Savings Service

Product Platform: Combo Conventional Health/Protection ULIP

Product Available: HDFC Life Classic One-UXR, HDFC Life Classic One-UXD, HDFC Life Classic One-LXL, HDFC Life Classic One-LXB, HDFC Life Classic One-LXA, HDFC Life Wealth Elite-LXC

Product Discussed: HDFC Life Sanchay Plus (Sp)-EAB

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[Generate Quote](#) [Complete](#) [Next](#)

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8. Click on Generate Quote

TEBT Portal | Click2Buy

salesdiaryuat.hdfclife.com/TEBTParPortal/portal.do?_pageid=pos_myquotePage&_portalid=pos&leadid=1-91526402440&product=SANCHPV9,SANCHPV9E&...

HDFC Life
Sar utha ke jyo!

Click2Buy

Home | **My Quote** | Bank Data Upload | Agent Data Upload | Mymix Quote | Non Assisted PCVC | NA PCVC Bulk Report

Application Form | Aversion TaskList | Initiate Cancellation | Employee Search | DEO Dashboard | Buddy FLS Dashboard

My Home >> My Quote

Namaste, TEJAS HARIYA (00955254)

Suitability Matrix | My Quote

Financial and Protection Needs *
 Total Household Income *
 Life Stage *

DOB *
 01/01/1990

Investor Type *
 Aggressive
 Moderate
 Conservative

Submit

PASA SSO Calculator

>> Launch-Pad

Fill details in **Suitability Matrix** page

TEBT Portal | Click2Buy

salesdiaryuat.hdfclife.com/TEBTParPortal/portal.do?_pageid=pos_myquotePage&_portalid=pos&leadid=1-91526402440&product=SANCHPV9,SANCHPV9E&...

HDFC Life
Sar utha ke jyo!

Click2Buy

Home | **My Quote** | Bank Data Upload | Agent Data Upload | Mymix Quote | Non Assisted PCVC | NA PCVC Bulk Report

Application Form | Aversion TaskList | Initiate Cancellation | Employee Search | DEO Dashboard | Buddy FLS Dashboard

My Home >> My Quote

Namaste, TEJAS HARIYA (00955254)

Suitability Matrix | My Quote

Financial and Protection Needs *
 Savings

Total Household Income *
 5 Lakhs to 20 Lakhs

Life Stage *
 Young Married with Childre

DOB *
 01/01/1990

Investor Type *
 Aggressive
 Moderate
 Conservative

I am comfortable with some degree of risk to my invested value.

Submit

PASA SSO Calculator

>> Launch-Pad

9. Click Submit -> My Quote page

TEBT Portal | Click2Buy | salesdiaryuat.hdfclife.com/TEBTParPortal/portal.do?_pageid=pos_myquotePage&_portalid=pos&leadid=1-91526402440&product=SANCHPV9.SANCHPV9E&...

Home | **My Quote** | Bank Data Upload | Agent Data Upload | Mymix Quote | Non Assisted PCVC | NA PCVC Bulk Report

Application Form | Aversion TaskList | Initiate Cancellation | Employee Search | DEO Dashboard | Buddy FLS Dashboard

My Home >> My Quote

Namaste, TEJAS HARIYA (00955254)

Suitability Matrix | **My Quote** | PASA SSO Calculator

Go Back to Sales Diary

Product Category: Savings | Savings: HDFC Life Sanchay Plus

Lead ID	Quote ID	Quote Date	Channel
1-91526402440		29/06/2022	Broca

DOB: 01/01/1990 (32yrs) | Gender: Male | Do you have your Aadhar information updated?: No

Plan Options: Guaranteed Maturity | Guaranteed Income | Life Long Income | Long Term Income

>>Launch-Pad

9. Enter premium and Sum Assured

TEBT Portal | Click2Buy | salesdiaryuat.hdfclife.com/TEBTParPortal/portal.do?_pageid=pos_myquotePage&_portalid=pos&leadid=1-91526402440&product=SANCHPV9.SANCHPV9E&...

PASA SSO Calculator

Go Back to Sales Diary

Product Category: Savings | Savings: HDFC Life Sanchay Plus

Lead ID	Quote ID	Quote Date	Channel
1-91526402440		29/06/2022	Broca

DOB: 01/01/1990 (32yrs) | Gender: Male | Do you have your Aadhar information updated?: No

Plan Options: Guaranteed Maturity | Guaranteed Income | Life Long Income | Long Term Income

Premium Frequency: Annual | Premium: ₹ 220000 | Sum Assured: ₹ 2706000 | Term: 10 Years

Premium Payment Term: 5 Years

>>Launch-Pad

TEBT Portal | Click2Buy

salesdiaryuat.hdfclife.com/TEBTParPortal/portal.do?_pageid=pos_myquotePage&_portalid=pos&leadid=1-91526402440&product=SANCHPV9,SANCHPV9E&...

Incognito

Payment Method for Future Premium
SI/ECS

SI/ECS

Choose Additional Riders

Income Benefit on Accidental Disability Rider HDFC Life Critical Illness Plus Rider HDFC Life Protect Plus Rider

Inputs for Income Benefit on Accidental Disability Rider

Rider Sum Assured: ₹ 2706000

Premium Payment Term Option: Limited

Rider Term: 10

Rider Premium Payment Term: 5

Rider Premium: ₹ 1351

Inputs for HDFC Life Critical Illness Plus Rider

Rider Sum Assured: ₹ 1000000

Premium Payment Term Option: Regular

Rider Term: 5

Rider Premium Payment Term: 5

Rider Premium: ₹ 1198

TEBT Portal | Click2Buy

salesdiaryuat.hdfclife.com/TEBTParPortal/portal.do?_pageid=pos_myquotePage&_portalid=pos&leadid=1-91526402440&product=SANCHPV9,SANCHPV9E&...

Incognito

Rider Premium: ₹ 1351

Inputs for HDFC Life Critical Illness Plus Rider

Rider Sum Assured: ₹ 1000000

Premium Payment Term Option: Regular

Rider Term: 5

Rider Premium Payment Term: 5

Rider Premium: ₹ 1198

Choose Options

Personal Accident Cover Accidental Death Cover Cancer Cover

Inputs for Accidental Death Cover

Rider Sum Assured: ₹ 1000000

Premium Payment Term Option: Limited

Rider Term: 10 Years

Rider Premium Payment Term: 5 Years

Rider Premium: ₹ 892

First Name * | Last Name | Email Id | Mobile Number *

TEBT Portal | Click2Buy | salesdiaryuat.hdfclife.com/TEBTParPortal/portal.do?...pageid=pos_myquotePage&_portalid=pos&leadid=1-91527023679&product=SANCHPE.SANCHP&...

Years
 Years
 Months
 Months

Rider Premium
₹ 892

First Name *
 Last Name
 Email Id
 Mobile Number *

Nationality *
 Resident Status *
 Country *
 State *

Is Life Insured same as Proposer? *
 Yes No

I hereby consent to receive insurance policy related communication/documents from HDFC Life or its authorized representatives, overriding my NCPR registration (if any), through:

Voice over Internet Protocol including WhatsApp

CALCULATE PREMIUM

Note: Please be careful in sharing the Mobile no., email id, city/district & pincode. It will be used for PCVC and communication (form and illustration). Cannot be changed later. You will have to submit new form if you give incorrect information.

>>Launch-Pad

10. Click Calculate premium (Life Assured is same as Proposer)

TEBT Portal | Click2Buy | salesdiaryuat.hdfclife.com/TEBTParPortal/portal.do?...pageid=pos_myquotePage&_portalid=pos&leadid=1-91526402440&product=SANCHPV9.SANCHP...

Is Life Insured same as Proposer? *
 Yes No

I hereby consent to receive insurance policy related communication/documents from HDFC Life or its authorized representatives, overriding my NCPR registration (if any), through:

Voice over Internet Protocol including WhatsApp

RE-CALCULATE PREMIUM

Dear Harman Joshi, Below are the Quotes Designed for you.

Quote 1	
Premium	Sum Assured
₹ 2,23,441/-	₹ 27,06,000/-
₹ -/- On Maturity*	
Coverage : 10 yrs	
Pay Premium For : 5 yrs	
Desired	
View Illustration	

Buy Now

*Calculated at 8% Assumed Rate

Note: Please be careful in sharing the Mobile no., email id, city/district & pincode. It will be used for PCVC and communication (form and illustration). Cannot be changed later. You will have to submit new form if you give incorrect information.

>>Launch-Pad

11. Click Buy Now

The screenshot shows a web browser window with the URL `salesdiaryuat.hdfclife.com/TEBTParPortal/portal.do?_pageid=pos_myquotePage&_portalid=pos&leadid=1-91526402440&product=SANCHPV9.SANCHP...`. The page title is "Product Category Savings" and the sub-header is "Savings HDFC Life Sanchay Plus". A modal window titled "Insurance Category and Distributor Summary" is open. It contains the following fields:

- Insurance Category: Individual (dropdown)
- Channel Details (All fields are mandatory):
 - FLS Name: BHARAT SINGH (dropdown)
 - FLS Code: 159488 (text)
 - Branch Code: ED00 (dropdown)
 - Channel Name: DRCT (dropdown)
 - Tele Code: 00000000 (text)
 - PLVC Code: (text)
 - FOS Code: 00000000 (text)

A "Submit" button is located at the bottom right of the modal. Below the modal, there are checkboxes for "Choose Additional Riders":
 Income Benefit on Accidental Disability Rider
 HDFC Life Critical Illness Plus Rider
 HDFC Life Protect Plus Rider

12. Fill values in Distribution Summary and click submit

The screenshot shows the same web browser window as in step 11. The "Confirmation" dialog box is open, displaying the following text:

Confirmation

Please note the following :

1. While making the premium payment in any of the HDFC Offices, please provide the Quote Reference Number (QRN) or the Application Number.
2. In case you have opted for ECS/SI as your payment method, please provide the following documents to us.
 - a. ECS/SI mandate form duly filled
 - b. A cancelled cheque leaf with your name printed

You can also view your Confirmed Illustration :

Please choose from the below options and Proceed

- Proceed To Dashboard Page
- Proceed to Application Form
- Generate a New Quote

A "Proceed" button is located at the bottom right of the dialog box. The background page shows the "Application Form" section with a "Confirmation" tab selected. Below the dialog box, the "Product Category" section is visible, showing a table with columns: Lead ID, Quote ID, Quote Date, and Channel. The values are: Lead ID: 1-91526402440, Quote ID: qb7a4ubmg74tc, Quote Date: 29/06/2022, Channel: Broca.

13. Select Proceed to application from above screen and click on Proceed

TEBT Portal | Click2Buy | salesdiaryuat.hdfclife.com/TEBTParPortal/portal.do?_pageid=pos_myquotePage&_portalid=pos&leadid=1-91526402440&product=SANCHPV9.SANCHP...

My Home >> Application Form | Namaste, TEJAS HARIYA (0095254) | Application No: 1100022605135 | Mymix No: Illustration | Status: 20% Completed

1. Customer Details | 2. Payment Details | 3. Document Submission

Proposer CKYC Details | Personal Details | Contact Information | Additional Details | Covid Questionnaire | Nominee Appointee

Review Proposal | Enhanced Underwriting Questionnaire

Form Completion: 20% Completed

Select if Proposer is same as Life Assured (Yes Selected)

Do you want CKYC Data Yes No

CKYC Number: [Empty]

Marital Status: --Select--

Country of Birth: India | Occupation: --Select--

Father's Name: Title: [Empty] | First Name: [Empty] | Middle Name: [Empty] | Last Name: [Empty]

Save | Continue

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Fill Proposer CKYC details

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My Home >> Application Form | Namaste, TEJAS HARIYA (0095254) | Application No: 1100022605135 | Mymix No: Illustration | Status: 20% Completed

1. Customer Details | 2. Payment Details | 3. Document Submission

Proposer CKYC Details | Personal Details | Contact Information | Additional Details | Covid Questionnaire | Nominee Appointee

Review Proposal | Enhanced Underwriting Questionnaire

Form Completion: 20% Completed

Select if Proposer is same as Life Assured (Yes Selected)

Do you want CKYC Data Yes No

Country of Birth: India | Occupation: Salaried | Occupation Category: Service-Private Se

Father's Name: Title: Mr. | First Name: Ramesh | Middle Name: [Empty] | Last Name: Joshi

Mother's Name: Title: Mrs. | First Name: Mantta | Middle Name: [Empty] | Last Name: Joshi

Save | Continue

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14. Fill Personal Details

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My Home >> Application Form

Namaste, TEJAS HARIYA (09952524)

Combo/Mymix: No Simultaneous Application: No HDFC Life Sanchay Plus Application No:1100022605135 Mymix No: [X] Illustration

Status: 20% Completed

1. Customer Details | 2. Payment Details | 3. Document Submission

Proposer CKYC Details | Personal Details | Contact Information | Additional Details | Covid Questionnaire | Nominee Appointee

Review Proposal | Enhanced Underwriting Questionnaire

Form Completion: 38% Completed

Basic Details Select if Proposer is same as Life Assured (Yes Selected)

Life Assured

Do you want CKYC Data Yes No

Is the customer an existing HDFC Life customer Yes No

Title* First Name* Last Name

--Select-- Harman Joishi

Gender* Male Female Transgender Male Transgender Female

Date Of Birth* Age*

Back Save Continue

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My Home >> Application Form

Namaste, TEJAS HARIYA (09952524)

Combo/Mymix: No Simultaneous Application: No HDFC Life Sanchay Plus Application No:1100022605135 Mymix No: [X] Illustration

Status: 20% Completed

1. Customer Details | 2. Payment Details | 3. Document Submission

Proposer CKYC Details | Personal Details | Contact Information | Additional Details | Covid Questionnaire | Nominee Appointee

Review Proposal | Enhanced Underwriting Questionnaire

Form Completion: 38% Completed

Basic Details Select if Proposer is same as Life Assured (Yes Selected)

Male Female Transgender Male Transgender Female

Date Of Birth* Age*

01/01/1990 32

Marital Status* Father's Name* Mother's Maiden Name

Married Ramesh Joshi

Nationality* Residential Status* Place of Birth* PAN Number Aadhaar Number GST Number

Indian Resident Indian mumbai

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>>Launch-Pad

15. Fill Contact information

My Home >> Application Form

Combo/Mymix: No Simultaneous Application: No HDFC Life Sanchay Plus Application No:1100022605135 Mymix No: [X] Illustration

Status: 34% Completed

1. Customer Details 2. Payment Details 3. Document Submission

Proposer CKYC Details Personal Details **Contact Information** Additional Details Covid Questionnaire Nominee Appointee

Review Proposal Enhanced Underwriting Questionnaire

Form Completion: 34% Completed

Correspondence Address

House / Flat No.* room no 3 Street / Area* Roopam Apt, near atria, Worli Landmark* Atria Mall

Country* India State* Maharashtra City/District* Mumbai Pin Code* 400007

Mobile* 91 7977854421 Email* ektan@hdfclife Telephone (Res) Telephone (Off) Fax LA Contact Number

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>>Launch-Pad

My Home >> Application Form

Combo/Mymix: No Simultaneous Application: No HDFC Life Sanchay Plus Application No:1100022605135 Mymix No: [X] Illustration

Status: 41% Completed

1. Customer Details 2. Payment Details 3. Document Submission

Proposer CKYC Details Personal Details **Contact Information** Additional Details Covid Questionnaire Nominee Appointee

Review Proposal Enhanced Underwriting Questionnaire

Form Completion: 41% Completed

Permanent Address Same as Correspondence Address

House / Flat No.* room no 3 Street / Area* Roopam Apt, near atria, Worli Landmark* Atria Mall

Country* India State* Maharashtra City/District* Mumbai Pin Code* 400007

Back Save Continue

>>Launch-Pad

TEBT Portal | Click2Buy | salesdiaryuat.hdfclife.com/TEBTParPortal/portal.do?_pageid=pos_myquotePage&_portalid=pos&leadid=1-91526402440&product=SANCHPV9.SANCHP...

Home | My Quote | Bank Data Upload | Agent Data Upload | Mymix Quote | Non Assisted PCVC | NA PCVC Bulk Report

Application Form | Aversion TaskList | Initiate Cancellation | Employee Search | DEO Dashboard | Buddy FLS Dashboard

My Home >> Application Form | Namaste, TEJAS HARIYA (00955254)

Combo/Mymix: No | Simultaneous Application: No | HDFC Life Sanchay Plus | Application No:1100022605135 | Mymix No: [Illustration] | Status: 26% Completed

1. Customer Details | 2. Payment Details | 3. Document Submission

Proposer CKYC Details | Personal Details | **Contact Information** | Additional Details | Covid Questionnaire | Nominee Appointee

Review Proposal | Enhanced Underwriting Questionnaire

Form Completion: 16% Completed

Communication Preference

Mode of Communication*
Call

Language of Communication*
English

Back | Save | Continue

>>Launch-Pad

16. Click Continue -> Additional Details

TEBT Portal | Click2Buy | salesdiaryuat.hdfclife.com/TEBTParPortal/portal.do?_pageid=pos_myquotePage&_portalid=pos&leadid=1-91526402440&product=SANCHPV9.SANCHP...

Application Form | Aversion TaskList | Initiate Cancellation | Employee Search | DEO Dashboard | Buddy FLS Dashboard

My Home >> Application Form | Namaste, TEJAS HARIYA (00955254)

Combo/Mymix: No | Simultaneous Application: No | HDFC Life Sanchay Plus | Application No:1100022605135 | Mymix No: [Illustration] | Status: 26% Completed

1. Customer Details | 2. Payment Details | 3. Document Submission

Proposer CKYC Details | Personal Details | Contact Information | **Additional Details** | Covid Questionnaire | Nominee Appointee

Review Proposal | Enhanced Underwriting Questionnaire

Form Completion: 16% Completed

Demat Account Details

Do you need policy in Demat Format? Yes No

Benefits +

Please select any one Preferred insurance repository to open DEMAT(eIA) Account :*

NSDL(National securities depository limited)

CAMS(Computer Age Management Services Limited)

Back | Save | Continue

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My Home >> Application Form

Namaste, TEJAS HARIYA (0095254)

Combo/Mymix: No | Simultaneous Application: No | HDFC Life Sanchay Plus | Application No:1100022605135 | Mymix No: [Illustration]

Status: 20% Completed

1. Customer Details | 2. Payment Details | 3. Document Submission

Proposer CKYC Details | Personal Details | Contact Information | **Additional Details** | Covid Questionnaire | Nominee Appointee

Review Proposal | Enhanced Underwriting Questionnaire

Form Completion: 45% Completed

Demat Account Details

Do you need policy in Demat Format? Yes No

Objective of Insurance

--Select--

Source of Fund

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My Home >> Application Form

Namaste, TEJAS HARIYA (0095254)

Combo/Mymix: No | Simultaneous Application: No | HDFC Life Sanchay Plus | Application No:1100022605135 | Mymix No: [Illustration]

Status: 36% Completed

1. Customer Details | 2. Payment Details | 3. Document Submission

Proposer CKYC Details | Personal Details | Contact Information | **Additional Details** | Covid Questionnaire | Nominee Appointee

Review Proposal | Enhanced Underwriting Questionnaire

Form Completion: 46% Completed

Salaries Business House Property Capital Gain Investment Agriculture Others

100 %

Payment Details

Initial Payment has been made from account/Debit Card/Credit Card that belongs to:

Self Spouse Parent Children Sibling Grand Parent Partnership Company HUF Trust Others

Mode of Payment Cheque DD Net Banking Debit Card Online/Offline Credit Card Others

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Application Form | Aversion TaskList | Initiate Cancellation | Employee Search | DEO Dashboard | Buddy FLS Dashboard

My Home >> Application Form | Namaste, TEJAS HARIYA (00955254)

Combo/Mymix: No | Simultaneous Application: No | HDFC Life Sanchay Plus | Application No:1100022605135 | Mymix No: [Illustration] | Status: 26% Completed

1. Customer Details | 2. Payment Details | 3. Document Submission

Proposer CKYC Details | Personal Details | Contact Information | **Additional Details** | Covid Questionnaire | Nominee Appointee

Review Proposal | Enhanced Undervriting Questionnaire

Form Completion: 18% Completed

Account Information for NEFT Payout

Do you want to have account for NEFT Payout? Yes No

Account Holder Name*	Bank Account Number*	Account Type*	IFSC Code*	Branch Name*
Harman Joshi	11880209978678	Savings	HDFC0000522	HDFC BANK

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My Home >> Application Form | Namaste, TEJAS HARIYA (00955254)

Combo/Mymix: No | Simultaneous Application: No | HDFC Life Sanchay Plus | Application No:1100022605135 | Mymix No: [Illustration] | Status: 26% Completed

1. Customer Details | 2. Payment Details | 3. Document Submission

Proposer CKYC Details | Personal Details | Contact Information | **Additional Details** | Covid Questionnaire | Nominee Appointee

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Form Completion: 18% Completed

Assignment Details

Do you want to have Assignment? Yes No

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Namaste, TEJAS HARIYA (00955254)

Combo/Mymix: No Simultaneous Application: No HDFC Life Sanchay Plus Application No:1100022605135 Mymix No: Illustration

Status: 20% Completed

1. Customer Details | 2. Payment Details | 3. Document Submission

Proposer CKYC Details | Personal Details | Contact Information | Additional Details | Covid Questionnaire | Nominee Appointee

Review Proposal | Enhanced Underwriting Questionnaire

Form Completion: 20% Completed

COVID Questionnaire for Life assured

1. Have you travelled outside India or your country of residence in the last 15 days or do you plan to during the next 3 months? Yes No

2. Have you been tested positive for COVID-19* or are awaiting results of such a test or been advised to be under quarantine due to COVID-19*? Yes No

3. Are you currently suffering from or in the last 1 month, have suffered from fever, persistent cough, sore throat, breathing difficulties, gastro-intestinal symptoms (vomiting/ diarrhoea) or been in in contact with an individual suspected or confirmed to have COVID-19 **? Yes No

4. Are you a Healthcare professional or enrolled as a Corona virus Warrior in a hospital/ clinic with COVID-19 facility and/ or treating/ in contact with COVID-19 Yes No

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Namaste, TEJAS HARIYA (00955254)

Combo/Mymix: No Simultaneous Application: No HDFC Life Sanchay Plus Application No:1100022605135 Mymix No: Illustration

Status: 26% Completed

1. Customer Details | 2. Payment Details | 3. Document Submission

Proposer CKYC Details | Personal Details | Contact Information | Additional Details | Covid Questionnaire | Nominee Appointee

Review Proposal | Enhanced Underwriting Questionnaire

Form Completion: 26% Completed

Yes No

3. Are you currently suffering from or in the last 1 month, have suffered from fever, persistent cough, sore throat, breathing difficulties, gastro-intestinal symptoms (vomiting/ diarrhoea) or been in in contact with an individual suspected or confirmed to have COVID-19 **? Yes No

4. Are you a Healthcare professional or enrolled as a Corona virus Warrior in a hospital/ clinic with COVID-19 facility and/ or treating/ in contact with COVID-19 infected individuals or contaminated material? Yes No

5. Have you been vaccinated for COVID-19*? Yes No
Mandatory field

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18. Fill Nominee Appointee details

My Home >> Application Form

Namaste, TEJAS HARIYA (0095254)

Combo/Mymix: No Simultaneous Application: No HDFC Life Sanchay Plus Application No:1100022605135 Mymix No: Illustration Status: 20% Completed

1. Customer Details 2. Payment Details 3. Document Submission

Proposer CKYC Details Personal Details Contact Information Additional Details Covid Questionnaire **Nominee Appointee**

Review Proposal Enhanced Underwriting Questionnaire

Form Completion: 20% Completed

Nominee Details

Is the customer an existing HDFC Life customer? Yes No

Title* First Name* Last Name

--Select--

Gender*

Male Female Transgender Male Transgender Female

Date Of Birth* Age*

DD/MM/YYYY

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Namaste, TEJAS HARIYA (0095254)

Combo/Mymix: No Simultaneous Application: No HDFC Life Sanchay Plus Application No:1100022605135 Mymix No: Illustration Status: 20% Completed

1. Customer Details 2. Payment Details 3. Document Submission

Proposer CKYC Details Personal Details Contact Information Additional Details Covid Questionnaire **Nominee Appointee**

Review Proposal Enhanced Underwriting Questionnaire

Form Completion: 20% Completed

Nominee Details

Is the customer an existing HDFC Life customer? Yes No

Title* First Name* Last Name

Mrs. Shobha Joshi

Gender*

Male Female Transgender Male Transgender Female

Date Of Birth* Age*

02/02/1990 32

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My Home >> Application Form

Name: TEJAS HARIYA (00955254)

Mymix No: [X] Illustration

Status: 20% Completed

1. Customer Details | 2. Payment Details | 3. Document Submission

Proposer CKYC Details | Personal Details | Contact Information | Additional Details | Covid Questionnaire | **Nominee Appointee**

Review Proposal | Enhanced Underwriting Questionnaire

Form Completion: 20% Completed

India | Maharashtra | Mumbai | 400007

Mobile: 91 | Email: | Telephone (Res):

Payor Details

Do you want CKYC Data? Yes No

Premium paid by * Life Assured Others

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1. Customer Details | 2. Payment Details | 3. Document Submission

Proposer CKYC Details | Personal Details | Contact Information | Additional Details | Covid Questionnaire | Nominee Appointee

Review Proposal | Enhanced Underwriting Questionnaire

Form Completion: 65% Completed

Personal Details

Basic Details

Life Assured

Do you want CKYC Data? Yes No

Is the customer an existing HDFC Life customer? * Yes No

Title * First Name * Last Name
Ms Harman Joshi

Gender *
 Male Female Transgender Male Transgender Female

Date Of Birth * Age *
01/01/1990 32

Marital Status * Father's Name * Mother's Maiden Name
Married Ramesh Joshi

Nationality * Residential Status * Place of Birth * PAN Number Aadhaar Number GST Number
Indian Resident Indian mumbai

Educational Qualification * Are you a Politically Exposed Person? * Yes No
B.Com

LA Occupation LA Annual Income Husband cover Income
--Select--

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Review

TEBT Portal | Click2Buy | salesdiaryuat.hdfclife.com/TEBTParPortal/portal.do?...
 Mrs. Shobha Joshi

Gender*
 Male Female Transgender Male Transgender Female

Date Of Birth* 02/02/1990 **Age*** 32

Relationship with Life Assured* Wife **Percentage of Entitlement*** 100

Nominee Address Details Same as Life Assured Address

House / Flat No.* room no 3 **Street / Area *** Roopam Apt. near atria, Worli **Landmark*** Atria Mall

Country* India **State *** Maharashtra **City/District*** Mumbai **Pin Code *** 400007

Mobile 91 **Email** **Telephone (Res)**

Payor Details
 Do you want CKYC Data? Yes No
 Premium paid by * Life Assured Others

Update **Submit**

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20. Click on submit

21. Enhanced Underwriting Questionnaire

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 Enhanced Underwriting Questionnaire

LIFE ASSURED 1

Identification Mark* mole All fields are Mandatory*

Details about your occupation

Present occupation details* Salaried **Designation*** Manager Business **Gross Yearly Income from all Sources (Rs)*** 1000000 **Name of present employer/business*** HDFC Bank Ltd

Workplace city* mumbai

Please state only the building name / number, street / area, landmark and pin code, city and country will be asked separately.* 400007

Does your occupation involve any of the following?(Please select all that apply)*
 None of these
 Exposure to chemical substances
 Exposure to hazardous materials

Industry to which your company or business belongs(cements, banking, etc)* Banking

Existing Cover

Do you have any existing insurance cover of premium paying and/ or paid-up policies?*
 Yes No

Simultaneous Applications

Have you submitted any simultaneous applications for life insurance to another life insurance company, which is still pending or are you likely to revive lapsed policies.*
 Neither of these
 Reviving lapsed policies
 Submitting Simultaneous Applications

Decisions on previous applications

[->Launch-Pad](#)

Industry to which your company or business belongs (cements, banking, etc)*

Banking

Existing Cover

Do you have any existing insurance cover of premium paying and/ or paid-up policies?*

Yes No

A) Sum Assured payable on death (total)*

Text input field

B) Sum assured payable on accidental death (excluding A)*

Text input field

C) Benefits payable on disability/ CI*

Text input field

D) How much of the cover A + B + C was taken out in last 12months?*

Text input field

E) How much of the cover A was taken out during the last five years?*

Text input field

Simultaneous Applications

Have you submitted any simultaneous applications for life insurance to another life insurance company, which is still pending or are you likely to revive lapsed policies.*

Dropdown menu with options: --Select--, Neither of these, Reviving lapsed policies, Submitting Simultaneous Applications

Applications which have been postponed

Add Row

Policy number for the postponed policy*

Text input field

Name of insurance company*

Text input field

Reason*

Text input field



Has any application for insurance on your life been accepted with extra premium?*

Yes No

Accepted with Extra Premium

Add Row

Policy number for the policy accepted with extra premium*

Text input field

Name of insurance company*

Text input field

Reason*

Text input field



Has any application for insurance on your life been accepted on other special terms?*

Yes No

Accepted on Other Special Terms

Add Row

Policy number for the policy accepted on other special terms*

Text input field

Name of insurance company*

Text input field

Reason*

Text input field



Has any application for insurance on your life been declined?*

Yes No

Declined

Add Row

Policy number for the declined policy*

Text input field

Name of insurance company*

Text input field

Reason*

Text input field



Has any application for insurance on your life been withdrawn by you?*

Yes No

Withdrawn

Add Row

Policy number for the withdrawn policy*

Text input field

Name of insurance company*

Text input field

Reason*

Text input field



Travel

Have you resided overseas for more than six months continuously during the last five years?*

Yes No

Past Travel

[Add Row](#)

Name of countries for past travel* Duration of stay*



Do you intend to reside overseas in the next six month?*

Yes No

Future Travel

[Add Row](#)

Name of countries for future travel* Duration of stay*



Avocation

Do you take part in any hobbies/ activities that could be considered dangerous in any way? E.g. aviation (other than as a fare-paying passenger), mountaineering, deep sea diving or any form of racing.*

Yes No

Have you/Had you ever diagnosed, tested ,treated, tested positive or been given medical advice for a disease or disorder such as: * Yes No

Cancer or Lump or abnormal growth

Diabetes / High Blood Sugar

Hypertension / Chest Pain / Cardiac or Heart Condition

Any condition related to nervous system or brain, kidney, lungs, liver, digestive system

Any infectious disease like Covid / Tuberculosis, HIV or Hepatitis B or C etc

Any Hospitalisation / Surgery / Investigation i.e. Blood Test / ECG / CT Scan / MRI / EEG

Build

What is your height?*

What is your weight (in kg)?*

[Medical Assessment Questionnaire](#)

Avocation

Do you take part in any hobbies/ activities that could be considered dangerous in any way? E.g. aviation (other than as a fare-paying passenger), mountaineering, deep sea diving or any form of racing.*

Yes No

Have you/Had you ever diagnosed, tested ,treated, tested positive or been given medical advice for a disease or disorder such as: * Yes No

Cancer or Lump or abnormal growth
Diabetes / High Blood Sugar
Hypertension / Chest Pain / Cardiac or Heart Condition
Any condition related to nervous system or brain, kidney, lungs, liver, digestive system
Any infectious disease like Covid / Tuberculosis, HIV or Hepatitis B or C etc
Any Hospitalisation / Surgery / Investigation i.e. Blood Test / ECG / CT Scan / MRI / EEG

Impairment Questionnaire

Have you ever suffered from : *

Diabetes/ high blood sugar/ sugar in urine
High blood pressure/ hypertension
Heart disease
Stroke

Yes No

Please select the impairment*

--Select--
Diabetes/ high blood sugar/ sugar in urine
Heart disease
High blood pressure/ hypertension

Have you ever suffered from : *

Respiratory disorders
Arthritis
Back problems
Tuberculosis
Any recurrent medical condition/ disability. (Including eye/ ear disorder)

Yes No

Please select the impairment*

--Select--
Any recurrent medical condition/ disability. (Including eye/ ear disorder)
Arthritis
Back problems

Have you ever suffered from:*

- Liver disorder
 - Kidney disorder
 - Disorder of the digestive system
 - Abnormality of thyroid
 - Blood disorder
- Yes No

Please select the impairment*

Blood disorder ▲
Disorder of the digestive system
Kidney disorder
Liver disorder ▼

Have you ever suffered from:*

- Epilepsy
 - Any nervous disorder or mental condition
 - Paralysis or multiple sclerosis
 - Depression or psychiatric disorder
 - Cancer or a tumor
- Yes No

Please select the impairment*

--Select-- ▲
Any nervous disorder or mental condition
Cancer or a tumor
Depression or psychiatric disorder ▼

Have you ever suffered or been diagnosed or been treated for Dengue or Swine Flu or Encephalitis ?*

- Yes No

Please select the impairment*

--Select-- ▲
Dengue
Encephalitis
Swine Flu ▼

Do you have any physical disability which is affecting your day to day activities?*

- Yes No

[Details for the physical disability](#)

[Add Row](#)

Impairment*	Date of diagnosis / event*	Name and address of the Doctor*	Details of investigation done*
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Under medication?*

Under medication?*

Yes No

Fully recovered?*

Yes No



Are you currently suffering from any illness, impairment or taking any medication or pills or drugs?*

Yes No

Details for the current impairment

[Add Row](#)

Impairment*

Date of diagnosis*

Name and address of the Doctor*

Details of investigation done*

Under medication?*

Yes No

Fully recovered?*

Yes No



Have you ever been tested positive for HIV/ AIDS or Hepatitis B or C, or have you been tested/ treated for other sexually transmitted disease or are you awaiting the results of such a test?*

Yes No

Details for the HIV

[Add Row](#)

Impairment*

Date of diagnosis*

Name and address of the Doctor*

Details of investigation done*

Under medication?*

Yes No

Fully recovered?*

Yes No

Details for the HIV

[Add Row](#)

Impairment*

Date of diagnosis*

Name and address of the Doctor*

Details of investigation done*

Under medication?*

Yes No

Fully recovered?*

Yes No



Had any recurrent medical condition or physical disability or illness or injury that has kept you from working for more than one week in last 5 years?*

Yes No

Details for the impairment in the last 5 years

[Add Row](#)

Impairment*

Date of diagnosis*

Name and address of the Doctor*

Details of investigation done*

Under medication?*

Yes No

Fully recovered?*

Yes No



During last 5 years have you undergone or been recommended to undergo hospitalisation?*

Yes No

Details for the hospitalisation in the past 5 years

[Add Row](#)

Impairment*

Date of diagnosis / event*

Name and address of the Doctor*

Details of investigation done*

...

Details for the hospitalisation in the past 5 years

[Add Row](#)

Impairment*	Date of diagnosis / event*	Name and address of the Doctor*	Details of investigation done*
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Under medication?*

Yes No

Fully recovered?*

Yes No



During last 5 years have you undergone or been recommended to undergo operation?*

Yes No

Details for the operation in the last 5 years

[Add Row](#)

Impairment*	Date of diagnosis / event*	Name and address of the Doctor*	Details of investigation done*
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Under medication?*

Yes No

Fully recovered?*

Yes No



During last 5 years have you undergone or been recommended to undergo X-ray any other investigation (excluding check-ups for employment/ insurance)?*

Yes No

Details for the X Ray in the last 5 years

[Add Row](#)

Impairment*	Date of diagnosis / event*	Name and address of the Doctor*	Details of investigation done*
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



During last 5 years have you undergone or been recommended to undergo X-ray any other investigation (excluding check-ups for employment/ insurance)?*

Yes No

Details for the X Ray in the last 5 years

[Add Row](#)

Impairment*

Date of diagnosis / event*

Name and address of the Doctor*

Details of investigation done*

Under medication?*

Yes No

Fully recovered?*

Yes No



Usual Doctor details

State the name, address, and telephone number of your usual doctor who attends you in the event of illness, or if you have been consulting with this doctor for less than three months, the name and contact details of your previous doctor.*

We may require you to undergo medical examinations/tests. Some of the medical tests may require you to observe fasting. Please indicate your preference of location, near which the medical tests can be conducted.*

Build

What is your height?*

5ft 6ins = 168cms

What is your weight (in kg)?*

60

Alcohol, tobacco and narcotics

Build

What is your height?*

5ft 6ins = 168cms ▾

What is your weight (in kg)?*

60 ▾

Alcohol, tobacco and narcotics

Do you consume alcohol?*

Yes No

What do you consume as?*

▾

How many units of alcohol do you consume per week?*

▭

Do you use tobacco products?*

Yes No

Details about your tobacco usage

What tobacco do you consume as?*

▾

How many units of tobacco do you consume per day?*

▭

Are you currently consuming or have you ever consumed narcotics or any such other substance whether prescribed or not? (Ganja, Hashish, Heroin, Cocaine, Charas, Marijuana, etc.)*

Yes No

Family History

Are any of your family members suffering from / have suffered from / have died of *

Heart disease?

High blood pressure?

Stroke?

Diabetes?

Kidney disease?

Cancer?

HIV/AIDS?

Yes No

Save

Continue

-----End-----