## Version History

<table>
<thead>
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<th>Date of Release</th>
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<th>Reviewed by (L&amp;T Side)</th>
<th>Approved by (L&amp;T side)</th>
<th>Approved by (IRDA - User department)</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Apeksha Madan, Jayanti U</td>
<td>Yatindra Madaan</td>
<td>Ms. Sudha Ramanujam</td>
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</tbody>
</table>
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Pre-requisites

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hardware - Personal Computer / Laptop</strong></td>
<td></td>
</tr>
<tr>
<td>Processor</td>
<td>Intel processors Pentium 4 / i3 / i5 / i7 @ 1GHz or above</td>
</tr>
<tr>
<td>RAM</td>
<td>1 GB RAM or above (min 1GB recommended)</td>
</tr>
<tr>
<td>Hard Disk</td>
<td>80 GB or above HDD</td>
</tr>
<tr>
<td>Ethernet Card</td>
<td>10 / 100 Mbps Ethernet card</td>
</tr>
<tr>
<td>Printer</td>
<td>Laser Jet</td>
</tr>
<tr>
<td><strong>Software</strong></td>
<td></td>
</tr>
<tr>
<td>Operating System</td>
<td>Windows XP (with Service Pack2), Windows Vista, Windows 7, Mac OS v 10.5</td>
</tr>
<tr>
<td>Office Utility</td>
<td>MS- Office 2003 or above</td>
</tr>
<tr>
<td>Browsers</td>
<td>Internet Explorer 7.0 / 8.0, Apple Safari 5.0 (recommended IE 8.0)</td>
</tr>
<tr>
<td>Java Runtime</td>
<td>JDK– 1.60</td>
</tr>
<tr>
<td>Adobe Acrobat Reader</td>
<td>9.0 version</td>
</tr>
</tbody>
</table>
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 III – 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 (*).
The fields in the **Trainee Registration** screen are explained in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Personal Details</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Do you own a Firm</strong></td>
<td>Select Yes or No. If yes, enter the name of the Sole Proprietor Firm.</td>
</tr>
<tr>
<td><strong>First Name</strong></td>
<td>Enter your first name.</td>
</tr>
<tr>
<td><strong>Middle Name</strong></td>
<td>Enter your middle name.</td>
</tr>
<tr>
<td><strong>Last Name</strong></td>
<td>Enter your last name.</td>
</tr>
</tbody>
</table>

**Figure 1: User Registration screen**

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address1</td>
<td>Enter the first line of the address.</td>
</tr>
<tr>
<td>Address2</td>
<td>Enter the second line of the address.</td>
</tr>
<tr>
<td>Address3</td>
<td>Enter the third line of the address.</td>
</tr>
<tr>
<td>Country</td>
<td><em>India</em> is displayed by default.</td>
</tr>
<tr>
<td>State</td>
<td>Select the state from the drop-down list.</td>
</tr>
<tr>
<td>District</td>
<td>Select the district from the drop-down list.</td>
</tr>
<tr>
<td>City</td>
<td>Select the city from the drop-down list.</td>
</tr>
<tr>
<td>Region</td>
<td>Select the region from the drop-down list.</td>
</tr>
<tr>
<td>Pin Code</td>
<td>Enter your pin code number.</td>
</tr>
</tbody>
</table>

#### Permanent Address

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address1</td>
<td>Enter the first line of the address.</td>
</tr>
<tr>
<td>Address2</td>
<td>Enter the second line of the address.</td>
</tr>
<tr>
<td>Address3</td>
<td>Enter the third line of the address.</td>
</tr>
<tr>
<td>Country</td>
<td><em>India</em> is displayed by default.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>------------------------------------------------------</td>
</tr>
<tr>
<td>State</td>
<td>Select the state from the drop-down list.</td>
</tr>
<tr>
<td>District</td>
<td>Select the district from the drop-down list.</td>
</tr>
<tr>
<td>City</td>
<td>Select the city from the drop-down list.</td>
</tr>
<tr>
<td>Region</td>
<td>Select the region from the drop-down list.</td>
</tr>
<tr>
<td>Pin Code</td>
<td>Enter the pin code number.</td>
</tr>
<tr>
<td><strong>Contact Details</strong></td>
<td></td>
</tr>
<tr>
<td>Email ID</td>
<td>Enter your email ID.</td>
</tr>
<tr>
<td>Alternate Email ID</td>
<td>Enter your alternate email ID.</td>
</tr>
<tr>
<td>Phone Number (off)</td>
<td>Enter your office phone number.</td>
</tr>
<tr>
<td>Phone Number (res)</td>
<td>Enter your residence phone number.</td>
</tr>
<tr>
<td>Fax Number</td>
<td>Enter your fax number.</td>
</tr>
<tr>
<td>Security Question</td>
<td>Select a security question from the drop-down list.</td>
</tr>
<tr>
<td>Security Answer</td>
<td>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.</td>
</tr>
<tr>
<td>Verification Code</td>
<td>Enter the case-sensitive verification code.</td>
</tr>
</tbody>
</table>

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.

![Acknowledgement](image)

**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.
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.

![Image of error message]

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.

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.
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.

   ![Log Off Confirmation dialog box](image)

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](image)

**Figure 7: Retrieve User ID/Password selection**

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

![Retrieve User ID/Password](image)

**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.

![Acknowledgement](image)

**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.

![Retrieve User ID/Password selection](image1)

**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.

![Retrieve User ID/Password options](image2)

**Figure 11: Retrieve Password options**

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

![Additional Retrieve Password options](image3)

**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.
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.

![User Profile screen](image)

**Figure 16: User Profile screen**

**To Change Password:**

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

![Change Password screen](image)

**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.

![Password Change Confirmation Message](image)

**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.

![Update User Profile Screen](image)

**Figure 19: Update User Profile screen**
3. Click **Submit**. An **Acknowledgement** dialog box is displayed notifying that your profile has been successfully updated.

![Acknowledgement dialog box](image)

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

![Trainer Selection Table](image1)

**Figure 24: Trainer Selection Table section**

6. In the **Select Trainer** column, click the cell corresponding to the department for which you want to select the trainer. Click ![filter icon](image2) 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.

![List of trainers](image3)

**Figure 25: List of trainers**

7. 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.
8. Click **Submit**. The **User Confirmation Message** dialog box is displayed to confirm submission.

![User Confirmation Message]

**Figure 26: Trainer Details section**

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

![Acknowledgement]

**Figure 27: New Request confirmation message**

10. 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.

ℹ️ 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.

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application ID</td>
<td>Displays the application ID generated on submission of the trainer selection request.</td>
</tr>
<tr>
<td>Name of the Trainer</td>
<td>Displays the trainer name.</td>
</tr>
<tr>
<td>Submitted Date</td>
<td>Displays the date on which the application was submitted.</td>
</tr>
<tr>
<td>Request Status</td>
<td>Displays the status of the application. There can be the following statuses:</td>
</tr>
<tr>
<td></td>
<td>• Application Submitted</td>
</tr>
<tr>
<td></td>
<td>• Application Approved</td>
</tr>
<tr>
<td></td>
<td>• Application Rejected</td>
</tr>
</tbody>
</table>

Figure 29: View submitted request option
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.

![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 *Trainee 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.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit</td>
<td>Click to submit the application form once you have selected the declaration check box.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Click to stop the application process and return to the home page. This action will also clear all the information entered without saving it.</td>
</tr>
<tr>
<td>Save as Draft</td>
<td>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.</td>
</tr>
<tr>
<td>Button</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>View Submitted Form</td>
<td>Click to view the submitted form (Form - 13) in read only mode</td>
</tr>
<tr>
<td>Print</td>
<td>Click to print the Form - 13 Trainee Surveyor Enrollment.</td>
</tr>
<tr>
<td>Clear</td>
<td>Click to clear the information entered.</td>
</tr>
<tr>
<td>Previous</td>
<td>Click to go to previous section.</td>
</tr>
<tr>
<td>Next</td>
<td>Click to go to the next section.</td>
</tr>
</tbody>
</table>

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.

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. Qualification*

<table>
<thead>
<tr>
<th>Qualification Type</th>
<th>Description</th>
<th>Date of passing</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insurance</td>
<td>Ins24</td>
<td>11-07-2010</td>
<td></td>
</tr>
</tbody>
</table>

### 2. Occupation status*

- [ ] Student
- [ ] Professional
- [ ] Business
- [ ] Employee
- [ ] Service
- [ ] Housewife
- [ ] Others

### 3. Employment Details

#### 3.1. Whether the applicant is currently employed?*

- [ ] Yes
- [ ] No

- **Name of Employer**: At Insurance Company Ltd
- **Nature of Organization**: Insurance Company
- **Nature of work**: Insurance survey related
- **Period of employment From**: 04-07-2011
- **To**: 13-07-2012

#### 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**: At Insurance Broking Ltd
- **Designation**: Insurance Agent
- **Nature of business**: Insurance Sales

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

- [ ] FIRE
- [ ] MARINE CARGO
- [ ] MARINE HULL
- [ ] ENGINEERING
- [ ] MOTOR
- [ ] MISC
- [ ] LOP

---

**Figure 32 Trainee Occupation Details screen**
The fields on the **Trainee Occupation Details** screen are explained in the following table.

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

![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.
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.

![Figure 34: Upload Documents screen](image)

<table>
<thead>
<tr>
<th>Checklist for the documents to be uploaded (Max. Upload Size: 3MB)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Passport size photo (jpg) *</td>
</tr>
<tr>
<td>2. Photo ID proof (jpg, pdf, doc) *</td>
</tr>
<tr>
<td>3. Present Address proof (jpg, pdf, doc) *</td>
</tr>
<tr>
<td>4. Experience Certificate (jpg, pdf, doc)</td>
</tr>
<tr>
<td>5. NOC from employer (if applicable) (jpg, pdf, doc)</td>
</tr>
<tr>
<td>6. Scanned Signature (jpg)</td>
</tr>
<tr>
<td>7. Upload all Training certificates (jpg, pdf, doc)</td>
</tr>
<tr>
<td>8. Upload all the Degree/Diploma Training documents *</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quality Type</th>
<th>Insurance</th>
<th>Select File</th>
<th>Browse…</th>
<th>Upload file</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Type</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Certificate of Trainer/Surveyor</td>
<td>Training Certificate.pdf (167KB)</td>
<td><img src="image" alt="X" /></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Insurance</td>
<td>training document.pdf (167KB)</td>
<td><img src="image" alt="X" /></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Submit  Cancel  Save as draft  View Submitted Form  Print  Clear
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.

![Figure 35: Confirm Details screen](image)
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.
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.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit</td>
<td>Click to submit the application form once you have selected the declaration check box.</td>
</tr>
<tr>
<td>Button</td>
<td>Description</td>
</tr>
<tr>
<td>----------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Cancel</td>
<td>Click to stop the application processing and return to the home page. This action will also clear all the information entered without saving it.</td>
</tr>
<tr>
<td>Save as Draft</td>
<td>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.</td>
</tr>
<tr>
<td>View Submitted Form</td>
<td>Click to view the submitted Fresh License Application (Form 1-AF) in read only mode.</td>
</tr>
<tr>
<td>Print</td>
<td>Click to print the submitted Fresh License Application (Form 1-AF).</td>
</tr>
<tr>
<td>Clear</td>
<td>Click to clear the data entered.</td>
</tr>
<tr>
<td>Previous</td>
<td>Click to go to previous section.</td>
</tr>
<tr>
<td>Next</td>
<td>Click to go to the next section.</td>
</tr>
</tbody>
</table>

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.

![Trainee Details screen](image)

**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.

![Figure 40: Training and Experience screen](image-url)
The fields in the **Training and Experience** screen are described in the following table.

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

![Employee Details screen](image)

**Figure 41: Employee Details screen**
The fields in the **Employee Details** screen are described in the following table.

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

Figure 42: License Details screen
The field in the **License Details** screen is described in the following table.

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

![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.
**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, Park Street House,  
Banerathang, Hyderabad - 500001  
Telephone no:040-2490-67

Dear Sir,  

I request that a licence to act as a Surveyor and Loss Assessor may be granted to me for the following offices:

**Department**

**Name**

Father/Husband Name

**Present Address**

Address: Paramount Block, A P Road,  
Mumbai 400027  
Mumbai, Maharashtra, India.

**Communication Details**

Date of Birth: 21-12-1991  
Email Id:  
Phone No.: Office:  
Mobile No.: +91-9825159525  
Phone No.: Residential:

**Qualification Details**

Qualification Type:  
Description:  
Passing Date:  

**Practical Training Details**

<table>
<thead>
<tr>
<th>Surveyor's Name</th>
<th>Department</th>
<th>Category</th>
<th>Trainer Name</th>
<th>Start Date</th>
<th>End Date</th>
<th>Areas Covered</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>AJAY 212021</td>
<td>FIRE</td>
<td>C</td>
<td>NAIR HEPHA</td>
<td>06-09-2012</td>
<td>06-11-2012</td>
<td>Fire</td>
<td>Pass</td>
</tr>
</tbody>
</table>

**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: 06-10-2012  
To Date: 07-11-2012  

Whether applicant is currently employed? Yes

**Current Employment Details**

Name of Employer: A P Insurance  
Nature of Work:  
Nature of Organization:  
From Date: 03-10-2012  
End Date: 07-11-2012

**Other Business/Profession Details**

Name of Firm:  
Designation:  
Nature of Business:  

Whether applicant has any other business/profession details? Yes

Name of Firm: A P Insurance  
Designation:  
Nature of Business:  
Sales

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

Name: A P 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.

---

Figure 44: Form Preview screen

Version: 1.0
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.

![User Confirmation Message](image)

**Figure 45: User confirmation message for license application**

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

![Make Payment](image)

**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.

![Demand Draft Details](image)

**Figure 47: Demand Draft Details screen**

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instrument number</td>
<td>Enter the demand draft number.</td>
</tr>
<tr>
<td>Amount to be paid (Rs.)</td>
<td>The amount payable is displayed by default.</td>
</tr>
<tr>
<td>Bank Name</td>
<td>Enter the name of the bank from which you created the demand draft.</td>
</tr>
</tbody>
</table>
- **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

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

**Figure 48: NEFT/RTGS Details screen**

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

- **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).**

![Acknowledgement dialog box](image)

**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.

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.

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

<table>
<thead>
<tr>
<th>User Profile</th>
<th>Trainee</th>
<th>View Application Status</th>
<th>Pending for clarification</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>URN</td>
<td></td>
<td>Application Submitted Date</td>
<td>Review Date</td>
</tr>
<tr>
<td>SUB123123231231</td>
<td>13-07-2012</td>
<td>16-07-2012</td>
<td></td>
</tr>
</tbody>
</table>

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

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

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

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

**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.

**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

<table>
<thead>
<tr>
<th>Application</th>
<th>Scenario</th>
<th>Message</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Training Enrolment Form</strong></td>
<td>Data not entered in Input fields</td>
<td>Field is Mandatory</td>
<td>Input field</td>
</tr>
<tr>
<td></td>
<td>Data entered is in wrong format</td>
<td>Field Cannot be Numeric</td>
<td>Input field</td>
</tr>
<tr>
<td></td>
<td>Value selected for month is incorrect</td>
<td>Field should have a numeric value</td>
<td>Input field</td>
</tr>
<tr>
<td></td>
<td>Value selected for month is incorrect</td>
<td>Value should be between 1 to 12</td>
<td>Dropdown field</td>
</tr>
<tr>
<td></td>
<td>Date selected is future date</td>
<td>Cannot be current or future date, please enter a valid date</td>
<td>Date/Calendar field</td>
</tr>
<tr>
<td></td>
<td>Uploading documents</td>
<td>Extension is not allowed, please attach file with extension file for an .PDF or .JPG.</td>
<td>File upload</td>
</tr>
<tr>
<td></td>
<td>Uploading documents</td>
<td>File size is greater than 3 MB, please upload a file less than 3 MB</td>
<td>File upload</td>
</tr>
<tr>
<td><strong>Trainer selection</strong></td>
<td>Data not entered in Input fields</td>
<td>Field is Mandatory</td>
<td>Input field</td>
</tr>
<tr>
<td><strong>Training completion certificate</strong></td>
<td>Data not entered in Input fields</td>
<td>Field is Mandatory</td>
<td>Input field</td>
</tr>
<tr>
<td></td>
<td>Data entered is in wrong format</td>
<td>Field cannot be Numeric</td>
<td>Input field</td>
</tr>
<tr>
<td></td>
<td>Data entered is in wrong format</td>
<td>Field cannot be string</td>
<td>Input field</td>
</tr>
<tr>
<td></td>
<td>Invalid date selection</td>
<td>To date cannot be before from date</td>
<td>Date/Calendar field</td>
</tr>
<tr>
<td></td>
<td>Invalid date selection</td>
<td>Invalid date</td>
<td>Date/Calendar field</td>
</tr>
<tr>
<td><strong>Fresh License</strong></td>
<td>Data not entered in Input fields</td>
<td>Field is mandatory</td>
<td>Input field</td>
</tr>
<tr>
<td></td>
<td>Data entered is</td>
<td>Field Cannot be</td>
<td>Input field</td>
</tr>
<tr>
<td>Error Handling</td>
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<tr>
<td>------------------------------------------------------------------------------</td>
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<td></td>
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<tr>
<td><strong>Data entered is in wrong format</strong></td>
<td></td>
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<tr>
<td><strong>Field should have a 6 digits numeric value.</strong></td>
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<tr>
<td><strong>Input field</strong></td>
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<tr>
<td><strong>Date selection</strong></td>
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<tr>
<td><strong>Cannot be a date from future.</strong></td>
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<td></td>
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<tr>
<td><strong>Date/Calendar field</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Date selection</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Date cannot be past or present date</strong></td>
<td></td>
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<tr>
<td><strong>Date/Calendar field</strong></td>
<td></td>
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</tr>
<tr>
<td><strong>Date selection</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>From date cannot be after to date</strong></td>
<td></td>
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</tr>
<tr>
<td><strong>Date/Calendar field</strong></td>
<td></td>
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<tr>
<td><strong>Date entry validations</strong></td>
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<tr>
<td><strong>Field should contain at most 30 characters.</strong></td>
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<td><strong>Input field</strong></td>
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<td><strong>Uploading documents</strong></td>
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<td><strong>File size is greater than 3 MB, please upload a file less than 3 MB</strong></td>
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<tr>
<td><strong>File upload</strong></td>
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</tr>
<tr>
<td><strong>Uploading documents</strong></td>
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<tr>
<td><strong>Extension is not allowed, please attach an &lt;&gt; extension file for &lt;&gt;</strong></td>
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<tr>
<td><strong>File upload</strong></td>
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</tr>
<tr>
<td><strong>Date selection</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Practical Training Details: difference between from date and end date</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>should not be more than 12 months</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Date/Calendar field</strong></td>
<td></td>
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<td></td>
</tr>
<tr>
<td><strong>Enter amount</strong></td>
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<td></td>
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</tr>
<tr>
<td><strong>Entered refund amount is greater than the amount paid</strong></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td><strong>Input field</strong></td>
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</tr>
<tr>
<td><strong>Add director details</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td><strong>Enter at most two director details</strong></td>
<td></td>
<td></td>
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<tr>
<td><strong>Table data</strong></td>
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<td></td>
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</tr>
<tr>
<td><strong>Pending for Clarification</strong></td>
<td></td>
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</tr>
<tr>
<td><strong>Data not entered in Input fields</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td><strong>Field is Mandatory</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Input field</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Index

<table>
<thead>
<tr>
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<th>Rejected</th>
<th>38, 51</th>
</tr>
</thead>
<tbody>
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<td>Application approved</td>
<td>Retrieve password</td>
<td>14</td>
</tr>
<tr>
<td>Attach certificate</td>
<td>Retrieve user ID</td>
<td>14</td>
</tr>
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<td>Change password</td>
<td>Select trainer</td>
<td>32</td>
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<td>E</td>
<td>Submit form 13</td>
<td>26</td>
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<td>Enrollment</td>
<td>Submit request</td>
<td>24</td>
</tr>
<tr>
<td>Enrollment confirmation</td>
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<td>2</td>
</tr>
<tr>
<td>I</td>
<td>Unique Reference Number (Form - III)</td>
<td>35</td>
</tr>
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<td>Individual surveyor</td>
<td>Unique Reference Number (Licensing)</td>
<td>49</td>
</tr>
<tr>
<td>L</td>
<td>Upload documents</td>
<td>33</td>
</tr>
<tr>
<td>Login</td>
<td>Upload documents for license</td>
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</tr>
<tr>
<td>N</td>
<td>User ID deletion</td>
<td>13</td>
</tr>
<tr>
<td>New request</td>
<td>User profile</td>
<td>17</td>
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<td>Pending</td>
<td>53</td>
</tr>
<tr>
<td>R</td>
<td>Registration</td>
<td>3</td>
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</tbody>
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