

भारत सरकार
संचार मंत्रालय, डाक विभाग
डाक जीवन बीमा निदेशालय
चाणक्यपुरी डाक घर परिसर, चाणक्यपुरी, नई दिल्ली-110021
Government of India
Ministry of Communications, Department of Posts
DIRECTORATE OF POSTAL LIFE INSURANCE
Chanakyapuri Post Office Complex, Chanakyapuri, New Delhi-110021

No. 26-02/Trg/2022-LI

Dated: 12.10.2022

To
All Heads of Circles

Subject: Launch of 'PLI Mobile Training App' (PMTA) for sales force of PLI and RPLI in collaboration with Insurance Institute of India, Mumbai on 12.10.2022 - reg

Since 2007, PLI Directorate is in collaboration with Insurance Institute of India (III), Mumbai for imparting training and holding licentiate examination for sales force of PLI and RPLI. Insurance Institute of India (III), Mumbai is an insurance training provider and is closely associated with all the segments of Insurance Industry.

2. The first edition of the training material for licentiate examination was printed in 2007-2008 by Insurance Institute of India (III) Mumbai and was distributed to Circles by PLI Directorate. The training material was further also printed in the year 2014. After that, no amendments have been made in the training material. Since then, various changes have also been made in PLI and RPLI like changes in promotional structure, incentive rates, operations and CIS.

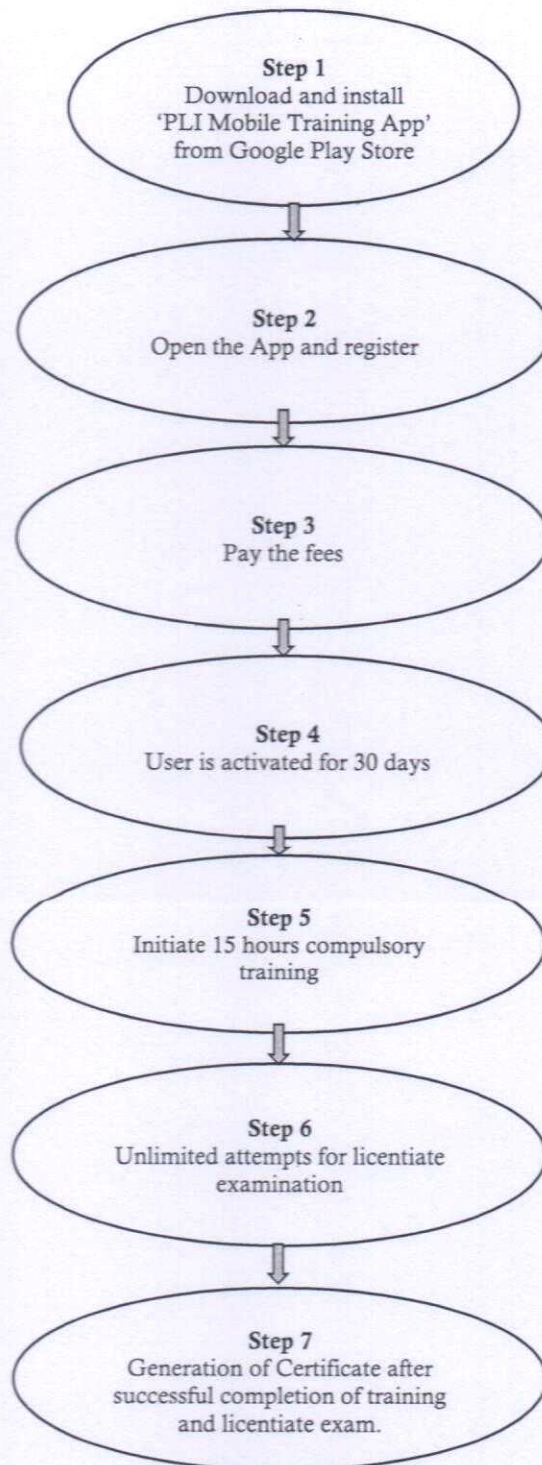
3. In today's digital world, where most of the activities are being performed digitally, it was felt that the training as well as licentiate examination for the sales force of PLI and RPLI may be carried out through a mobile app. This will make training and licentiate examination for sales force of PLI and RPLI convenient, economical and digital, which is tune with the Government's vision.

4. The '**PLI Mobile Training App**' for sales force of PLI and RPLI in collaboration with Insurance Institute of India, Mumbai has been launched on 12.10.2022, during the National Postal Week 2022. Further, this mobile app is being developed in 12 languages by Insurance Institute of India (III) Mumbai. Initially, PLI Mobile Training App will be available in Hindi & English, and later on in other regional languages like Gujarati, Kannada, Telugu, Tamil, Marathi, Bengali, Assamese, Malayalam, Oriya and Punjabi. This App has training material in Audio Visual mode as well as in an e-book format. Further, it will also facilitate online licentiate examination.

5. Promotional and incentive structure was circulated vide PLI Directorate OM No. 28-03/2019-LI dated 19.06.2020, prescribing 3 days of in-house and 3 days of practical training for DAs and FOs at Divisional level. However, after launching of PLI Mobile Training App on 12.10.2022, the said training will now be modified and shall be of 15 hours duration on the App from the time of registration by DA/FO. Therefore, the 3 days in-house and 3 days practical training at Divisional level will be dispensed with from 12.10.2022 onwards.

6. Online training is open for a duration of 30 days from the date of activation by the candidate. It has 15 hours of mandatory training. After training, the candidate (sales force) can appear in online licentiate examination with unlimited attempts within 30 days of activation.

7. Following is the flow chart for training and licentiate examination: -



8. Features of 'PLI Mobile Training App'

The 'PLI Mobile Training App' has been developed in collaboration with Insurance Institute of India Mumbai and has the following features:

- (i) The online training will be open for duration of **30 days** from the date of activation for any subscriber or till his passing examination, whichever is earlier.
- (ii) The online training Module will initially be available in English, Hindi and later in other languages as stated in para 4 in a phased manner.
- (iii) Registration form for the candidate and MIS reports for Divisions/ Circles is available on the App.
- (iv) The candidate can search "PLI Mobile Training App" in Google Play Store.
- (v) The candidate has to Create Account and Enter Candidate's Details. The system is expecting the unique combination i.e. (Agent Code + PAN Number + Email ID of the candidate). While creating Account, candidate will have enter following details: Agent Code, Email ID, Name of the Candidate, PAN, Mobile No, Candidate's Address, Circle, Region, Division.
- (vi) The fees for Training and Examination is Rs. 339/-+GST = Rs. 400/-. The components of the fees are as follows:

Training and Book – PDF (Downloadable and not printable) – Fees	Examination Fees	Total	GST	Total Fees to be paid	Training Module Validity Days to complete 15 hours of training and examination
Rs. 219/-	Rs. 120/-	Rs. 339/-	Rs. 61/-	Rs. 400/-	30 days

- (vii) If the candidate is not able to complete both i.e. Training of 15 hours and examination within 30 days, then candidate needs to pay fees i.e. Rs. 400/- towards Training and Examination fees again.
- (viii) If the candidate completes training of 15 hours within 30 days but is not able to pass the examination within 30 days, then the candidate needs to pay Rs. 120/- towards Examination Fees. The training module will accordingly be activated for 30 days to re-appear for the examination with unlimited attempts for 30 days.
- (ix) The candidate needs to access Training Module to complete 15 hours of Training and pass the examination on the same platform. The candidate has to get 35% to pass the examination. There will be total 25 questions. There will be unlimited attempts to pass the examination within 30 days. (The total 30 days will be calculated from the date of payment of fees)

- (x) **Rs 339/- + GST (Rs. 219/- + GST for training and Rs. 120/- + GST for examination)** will be charged per subscriber for online **Training and Exam both** and would be paid by DA/FO. Online payment modes are available in the App. This is in supersession of instructions issued vide PLI Directorate letter no. 26-02/Trg/2010-LI dated 06.05.2014 regarding expenditure to be booked for licentiate examination for all Agents.
- (xi) After passing examination, the candidate can generate Training cum Examination Passing certificate of Licentiate Examination from the App itself.

9. Further, instructions regarding clearing the licentiate examination, as already circulated vide PLI Directorate OM No. 28-03/2019-LI dated 19.06.2020 that "Direct Agents and Field Officers will be required to clear the licentiate examination, within 3 years of engagement" will continue to stand. Initially, DA/FO will be issued provisional license, which will be converted into a permanent license on passing the licentiate exam. The permanent license will be valid for a period of 5 years from the date of engagement, which may be renewed by the Head of the Division every year thereafter, on the basis of satisfactory business performance by the DA/FO. The agency will stand terminated if the DA/FO fails to clear licentiate examination within a period of 3 years of engagement. The agency will also be terminated if the permanent license is not renewed every year after 5 years of engagement as DA/FO.

10. Further the instructions issued vide CGM (PLI) DO No. 39-02/2022-LI dated 27.05.2022 may be strictly adhered to wherein each Postal Division should engage a minimum of 10 Direct Agents per month. Therefore, all Circles are requested that monthly target of engaging 10 DAs per Division per month should be achieved. Newly engaged and existing Direct Agents and Field Officers who have not yet passed the licentiate examination should be trained and encouraged to clear the licentiate examination. Existing Direct Agents and Field Officers having valid permanent license are not required to register again.

11. Keeping in view the training needs of the DE and GDS as sales force, **it has been decided that from 12.10.2022 onwards, all the sales force including the existing DE and GDS have to undergo 15 hours of training on the app and also pass the licentiate examination.** This training would be in a phased manner, as per availability of funds under PPSS (Non-Scheme) allotted to Circles i.e. will be borne by the Department. The procedure for payment of fees (for DEs & GDS) will be as follows:

- 11.1 Initially, DEs and GDS have to register for the training on the App and pay the fees Rs. 339/- + GST on their own cost.
- 11.2 After successful completion of training and examination, the DEs and GDS have to submit the training cum examination completion certificate to their Division.
- 11.3 Thereafter, the fees paid by DEs and GDS will be reimbursed by the Head of the Division from PPSS (Non-Scheme) by issuing a sanction order.

One day's CPC training is not mandatory for DEs and GDS. Also, the Head of Division may review the continuance of license of all sales force keeping in view the condition of procuring a minimum of 4 policies per sales force in a financial year, every year or as decided from time to time. The condition for passing the licentiate examination within 5 years of engagement or from 12.10.2022 onwards will be mandatory for existing and prospective DEs and GDS engaged as sales force.

12. The target for training and licentiate examination to DE and GDS for Circles are calculated based on the PPSS (Non-Scheme) fund allotted to Circles for FY 2022-23 and attached as **Annexure-I**.

13. Twenty copies of flyers containing the information regarding PLI Mobile Training App are attached herewith. Further, the open format of these flyers is also attached for translation by Circles in vernacular language. Therefore, all Circles are requested to give wide publicity regarding launching of PLI Mobile Training App on 12.10.2022 and disseminate this information to all levels. PLI Directorate will conduct one day's training on the features of the App shortly. The procedure for training and licentiate examination on the PLI Mobile Training App is also attached as **Annexure-II**.

Yours sincerely,



(Ajay Kumar Roy)
Chief General Manager (PLI)