

DTAP Procedure Manual – Softlogic Life Insurance PLC

For above Rs. 2 million loans

Step 01 - Getting a quotation

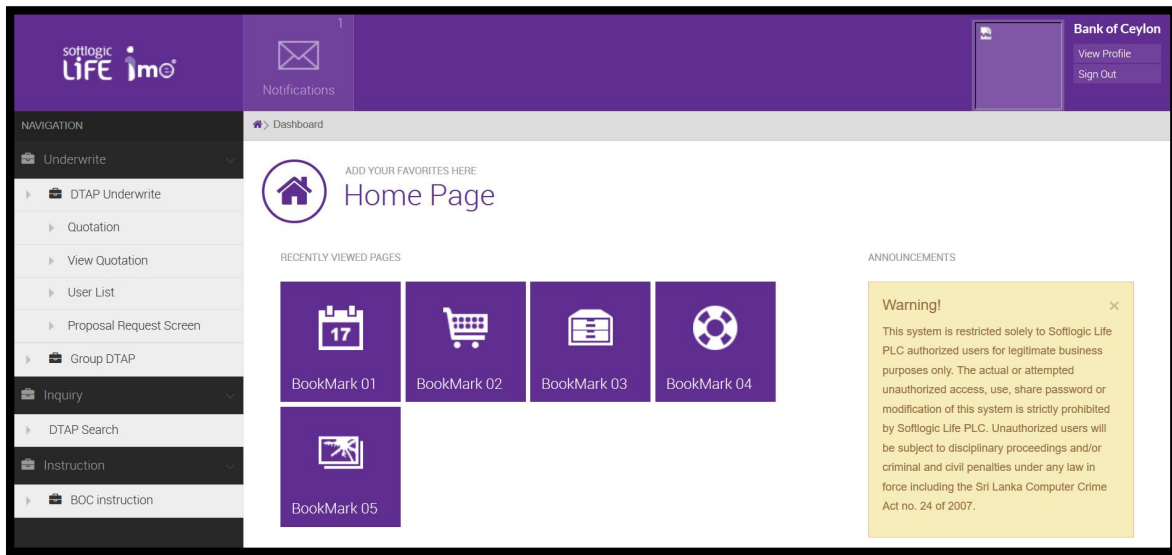
Log in to the system using below credentials to get the DTAP quotation;

- Link: <http://ime.softlogiclife.lk/> or <http://220.247.203.34/ime>
- Username: DTAP.BOC
- Password: DTAP@1234
(Please select "Bank" in the 3rd field)

1. Log in Page

2. Home Page

3. Click 'Underwrite' then 'DTAP Underwrite' then 'Quotation' from the drop down list



4. Calculate the premium by filling "DTAP - Quotation"


The screenshot shows the 'DTAP - Quotation' form. The form is titled 'Main Life Details' and contains several input fields: 'Lending Institution' (Abans Finance PLC), 'Branch' (Anuradhapura), 'Loan Amount (Rs)', 'Date of Birth (mm/dd/yyyy)', 'Interest Rate (%)', 'Term (Years)' (dropdown), 'Loan Type' (dropdown), 'Name of the Proposer' (MR), 'Address', 'Total and Permanent Disability Cover' (radio buttons for Yes/No), and 'Joint Life' (radio buttons for Yes/No). A 'Total Amount' field is at the bottom with a search icon.

Please note,

- Always type the full name of the customer
- Fill the customer's date of birth as the mentioned format
- Please always roundup the term to the next whole figure
- Please select the correct gender since the premium is varying
- Please select the correct loan type

Once you click on save icon, you will be getting the Quotation form as follows,

Quotation No : DQT/2017/5589
Date : 8 September, 2017



The Manager
Bank of Ceylon
Kollupitiya 034
Dear Sir/Madam,

Quotation for Decreasing Term Assurance Policy

Further to the application forwarded for Mortgage Protection policy, we are pleased to forward an indicative quotation for your kind consideration. Details are as follows.

Life 1			
Name of the Proposer	: Mr Prabu		
Date Of Birth	: 24-Jun-1985		
Age	: 32		
Gender	: Male		
Benefit Payable	: Death and Total Permanent Disability Cover (Due to accident / sickness)		
Medical Reports	: Medicals not Required		
Purpose Of The Loan	: Housing Loan	Term (Years)	: 10
Interest rate (%)	: 15.00	Interest rate Type	: Fixed
Loan Amount (LKR)	: 2,500,000.00	Total Premium (LKR)	: 9,303.00

Please note that the above quotation is calculated at standard rates and the premium could defer according to age at the time of accepting the proposal, medical, occupational or any other reason which may impose higher risk on life. This is only a quotation and not an acceptance of risk. This Quotation is valid for a period of 30 days.


We trust the above will meet with your requirements and await a favorable response. If you need any clarification please feel free to contact us.


Thank You


Softlogic Life Insurance PLC

Step 02 – Issuing cover confirmation

- If the client agrees to the DTAP quotation premium amount, go to “Proposal Request screen” by clicking “DTAP underwrite” under “Underwrite”.





Notifications


Bank of Ceylon
[View Profile](#)
[Sign Out](#)

NAVIGATION

[Underwrite](#)
DTAP Underwrite
Quotation
View Quotation
User List
Proposal Request Screen
Group DTAP
Inquiry
Instruction

Dashboard



PROPOSAL REQUEST
Proposal Request

Proposal Request

Quotation No

Search

Purpose Of Loan

Interest rate

Loan Amount

Joint Life


☐ Yes ☒ No

Loan Ref no

Life 1

- Feed the quotation number to the Proposal Request screen and click the search button to ex-tract all the relevant information from quotation to proposal request screen

Underwrite
Inquiry
Instruction


PROPOSAL REQUEST

Proposal Request

Proposal Request

Quotation No DQT/2017/5589

Purpose Of Loan Housing Loan

Interest rate 15.00%

Loan Amount 2,500,000.00

Joint Life ☐ Yes ☒ No

Loan Ref no 123

Life 1

Name of the Proposer MR Prabu

Addresss ward place, colombo 07

Date of Birth 1985-Jun-24

Gender Male

- If you need to change the information, do the change and click update button

Life 1

Name of the Proposer MR Prabu

Addresss ward place, colombo 07

Date of Birth 1985-Jun-24

Gender Male

Lending Institution Details

Lending Institution C49 Bank of Ceylon

Branch Kollupitiya 034

Branch Email address boc034@boc.lk

Branch Contact no 011-4795036

Contact Person Name xyz

Update

Print Updated Proposal

- Click "Print Updated Proposal" to get the auto filled Proposal form in PDF format.

softlogic LIFE		Quotation Number : DQT/2017/5589		BOC ASSURANCE In association with Softlogic Life Insurance	
Proposal for Softlogic Life Loan Protection Plan - Loan amount above LKR 2,000,000/=					
01. බැංකු ශාඛාව සහ ශාඛා කේතය / Bank Branch and Branch Code	KOLLUPITIYA 034				
02. ණය මුදල / Loan Amount	LKR	2,500,000.00	03. මහල් ප්‍රතිශතය / Interest Rate	15.00% Fixed	
			03.1 Fixed Rate	<input type="checkbox"/>	
			03.2 Variable Rate	<input type="checkbox"/>	
04. ණය කාල සීමාව (වර්ෂ) / Term (Years)	10	05. සමුද්‍ර ණයක් නම් එකිනෙකා අතර සම්බන්ධතාවය / If this is a joint loan, relationship with each other (Submit separate proposal for each joint loan holder)	MAIN LIFE		
06. ණය ඉවහරැස්සීමේ අරමුණ / Purpose of the Loan	HOUSING LOAN				
07. රැකවරයාගේ සම්පූර්ණ නම / Name in Full	MR PRABU				
08. ලිපිනය / Address	WARD PLACE, COLOMBO 07				
09. උපන් දිනය / Date of Birth	1985-Jun-24	10. ජා.සං.ප. අංකය / NIC Number			
11. ජීවිතය-අවිවාහිත බව / Civil Status		12. ස්ත්‍රී-පුරුෂ බව / Gender	MALE		
13. රැකියාව / Occupation		14. මාසික ආදායම / Monthly Income	LKR		

- Take a print out of the Proposal form and fill the rest of the details with the help of customer

softlogic LIFE		Quotation Number : DQT/2017/5589		BOC ASSURANCE	
Proposal for Softlogic Life Loan Protection Plan - Loan amount above LKR 2,000,000/=					
01. බැංකු ශාඛාව සහ ශාඛා කේතය / Bank Branch and Branch Code	KOLLUPITIYA 034				
02. ණය මුදල / Loan Amount	LKR	2,500,000.00	03. මහල් ප්‍රතිශතය / Interest Rate	15.00% Fixed	
			03.1 Fixed Rate	<input type="checkbox"/>	
			03.2 Variable Rate	<input type="checkbox"/>	
04. ණය කාල සීමාව (වර්ෂ) / Term (Years)	10	05. සමුද්‍ර ණයක් නම් එකිනෙකා අතර සම්බන්ධතාවය / If this is a joint loan, relationship with each other (Submit separate proposal for each joint loan holder)	MAIN LIFE		
06. ණය ඉවහරැස්සීමේ අරමුණ / Purpose of the Loan	HOUSING LOAN				
07. රැකවරයාගේ සම්පූර්ණ නම / Name in Full	MR PRABU				
08. ලිපිනය / Address	WARD PLACE, COLOMBO 07				
09. උපන් දිනය / Date of Birth	1985-Jun-24	10. ජා.සං.ප. අංකය / NIC Number	SS 176156V		
11. ජීවිතය-අවිවාහිත බව / Civil Status	Single	12. ස්ත්‍රී-පුරුෂ බව / Gender	MALE		
13. රැකියාව / Occupation	Executive	14. මාසික ආදායම / Monthly Income	LKR	10,000 - 400	
15. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
16. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
17. දුරකථන අංකය / දුරකථන අංකය / Telephone / Mobile Number	077 4649 3054				
18. පිටත මුදල් ලිපිනය / E-mail Address	prabu.donnanayake@softlogic.lk				
19. අධ්‍යාපන ප්‍රවෘත්ති (පාඨමාර්ග / පාඨමාර්ග / Educational Qualifications (Undergraduate/Postgraduate/Trade Qualifications))	B.A., A.C.A., C.T.A.				
20. ණය මුදල ඉවහරැස්සීමේ අරමුණ / Purpose of the Loan	HOUSING LOAN				
21. ණය මුදල ඉවහරැස්සීමේ අරමුණ / Purpose of the Loan	HOUSING LOAN				
22. උපන් දිනය / Date of Birth	1985-Jun-24	23. උපන් දිනය / Date of Birth	1985-Jun-24		
24. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
25. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
26. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
27. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
28. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
29. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
30. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
31. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
32. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
33. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
34. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
35. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
36. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
37. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
38. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
39. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
40. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
41. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
42. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
43. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
44. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
45. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
46. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
47. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
48. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
49. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
50. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
51. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
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53. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
54. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
55. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
56. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
57. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
58. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
59. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
60. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
61. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
62. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
63. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
64. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
65. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
66. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
67. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
68. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
69. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
70. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
71. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
72. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
73. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
74. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
75. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
76. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
77. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
78. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
79. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
80. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
81. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
82. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
83. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
84. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
85. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
86. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
87. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
88. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
89. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
90. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
91. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
92. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
93. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
94. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
95. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
96. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
97. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
98. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				
99. රැකවරයාගේ අවස්ථාව / Nature of Work	Insurance				
100. රැකවරයාගේ සම්පූර්ණ නම / Name and Address of the Employer	Softlogic Life Insurance PLC				

- Upload the Proposal form and the NIC copy of the client to the system (If Joint account fill two separate proposal forms and upload the forms with the respective NIC copies)

The screenshot shows a web browser window with the URL `S(xjfc4lzaxs2uuucsuhx4e1bh))/DTAPfrmProposalRequestBankForm.aspx`. The page has a purple header bar with the text "Lending Institution Details". Below the header, there are several input fields and buttons:

- Lending Institution:** A dropdown menu showing "C49" and "Bank of Ceylon".
- Branch:** A dropdown menu showing "Kollupitiya 034".
- Branch Email address:** A text input field containing "boc034@boc.lk".
- Branch Contact no:** A text input field containing "011-4795036".
- Contact Person Name:** An empty text input field.

Below these fields are two purple buttons: "Update" and "Print Updated Proposal".

Below the buttons is another purple header bar with the text "Lending Institution Details". Below this header, there are two sections for uploading files:

- Upload Life 1 Proposal Form:** A section with a "Browse..." button, the text "No files selected.", and an "Upload" button.
- Upload Life 1 NIC:** A section with a "Browse..." button, the text "No files selected.", and an "Upload" button.

At the bottom of the form is a "Remarks" section with a large text input field.

Cover confirmation will be released by Softlogic life within one hour if all the documents are in order and the loan within the following non-medical limits.

Non-Medical Grid

Non-Medical Limits Age	Housing Loan Amount (Rs.)	Other Loan Amount (Rs.)
18 - 35	Up to 35 Mn	Up to 15 Mn
36 – 40	Up to 25 Mn	Up to 10 Mn
41 – 45	Up to 20 Mn	Up to 10 Mn
46 – 50	Up to 10 Mn	Up to 5 Mn
51 – 55	Up to 5 Mn	Up to 3 Mn

Medical checkup letter

If the loan is above the non-medical limit or needs a medical report, (will be decided by Softlogic life underwriting team) a **medical checkup letter** will be issued by Softlogic life to get a medical report from nominated medical laboratory.

Customer needs to submit the original medical report to get the cover confirmation form to Softlogic life

Step 03 - Payment

Transfer the Payments to following bank account by mentioning the cover confirmation as reference,

- **Account Name** : **Softlogic life Insurance PLC**
- **Bank & Branch** : **BOC Corporate Branch**
- **Account number** : **81169175**
- **Reference** : **Cover confirmation number (Example - DT/PR2017/XXXXXX)**

Step 04 – Send original forms to Softlogic life

Send the original Proposal form to softlogic life after making the payment. (Only for above Rs. 2,000,000.00 loans)

Step 05 – Issuance of original policy document

Softlogic life will issue original policy within one working day after receiving original proposal form and the payment.