## User Guide Envoy - Self-Deactivation

https://envoy.iib.gov.in

## Introduction

The aim of this guide is to give a quick walk-through of Self -Deactivation system available in ENVOY Portal and to take the user through the steps involved in the process. Currently, the feature is available for licensed insurance salespersons other than Individual Agents and Specified Persons of Corporate Agents.

Following are the steps involved in self-deactivation of a licensed insurance salesperson:

1. Type <u>https://Envoy.iib.gov.in</u> on the browser. On the screen shown below, click on the "ENVOY Self Deactivation portal" link at the bottom right of the screen.

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	Click	Here>ENVOY Self-Deactivation portal
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 On "Self-Deactivation portal" screen shown below, enter PAN & registered Mobile Number of the salesperson and click Submit.

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Note: In case the salesperson's Mobile number is not registered over ENVOY, he/she can approach employer concerned to get the correct number registered before they can request for self-deactivation.

3. After entering the PAN & Mobile number, an OTP will be sent to the registered mobile number.

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4. Enter the OTP and click submit for verifying the OTP.

The system will verify the PAN & registered mobile number using OTP based mechanism.

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5. Post OTP verification, the list of distribution channel types will be displayed. Select the distribution channel/company from which the salesperson seeks to be deactivated by clicking on "Click Here to Deactivate" as shown below.



6. After clicking on "Click Here to Deactivate" a request will be triggered to the respective Insurer/ Intermediaries for approval.

Note: An SMS notification will be triggered to the registered Mobile Number once the request for deactivation has been accepted or rejected by the Insurer/ Intermediary within 30 days of waiting period.

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7. For accepting/rejecting the salesperson's request for deactivation, the Insurer/ Intermediary concerned needs to login to the Envoy portal at <u>https://Envoy.iib.gov.in</u> with secure login credentials. After login, Insurer/ Intermediary needs to click on "Agent Deactivation Request" as shown below.



8. After clicking on "Agent Deactivation Request" tab, all the requests pertaining to the company will be shown as below

Database of Licens Insurance Sales Person	<b>y</b> ed ons											NOLENICE AND PARTY	
	Home	BulkUpload	Query	HelpDocs	SingleUpload	Reports	De-Activate	Agent Dead	tivation Request	ChangePassword			
	Logout												
IMR.LIC   LIFE INSURERS											Agent Deact	ivation R	equest
PAN		Agent Na	me			Deactivatio	n Request Date		Deacti	vation Status	Accept	Reject	t
CQNPS7215A	SRINIVAS SANKAR	RISETHI			2022-06-01				Pending		Accept	Reject	

9. Once the Insurer/Intermediary takes any action such as "Accept" or "Reject", the record gets updated accordingly and a notification to the agent will be sent via SMS.

**Note:** If no action is taken on the deactivation request of the salesperson by the respective Insurer/Intermediary, the system will deactivate the status automatically at the end of 30 days from the date of request for deactivation.

Please email to <u>selfdeactivation@iib.gov.in</u> for any clarifications related to deactivation of salespersons over ENVOY.