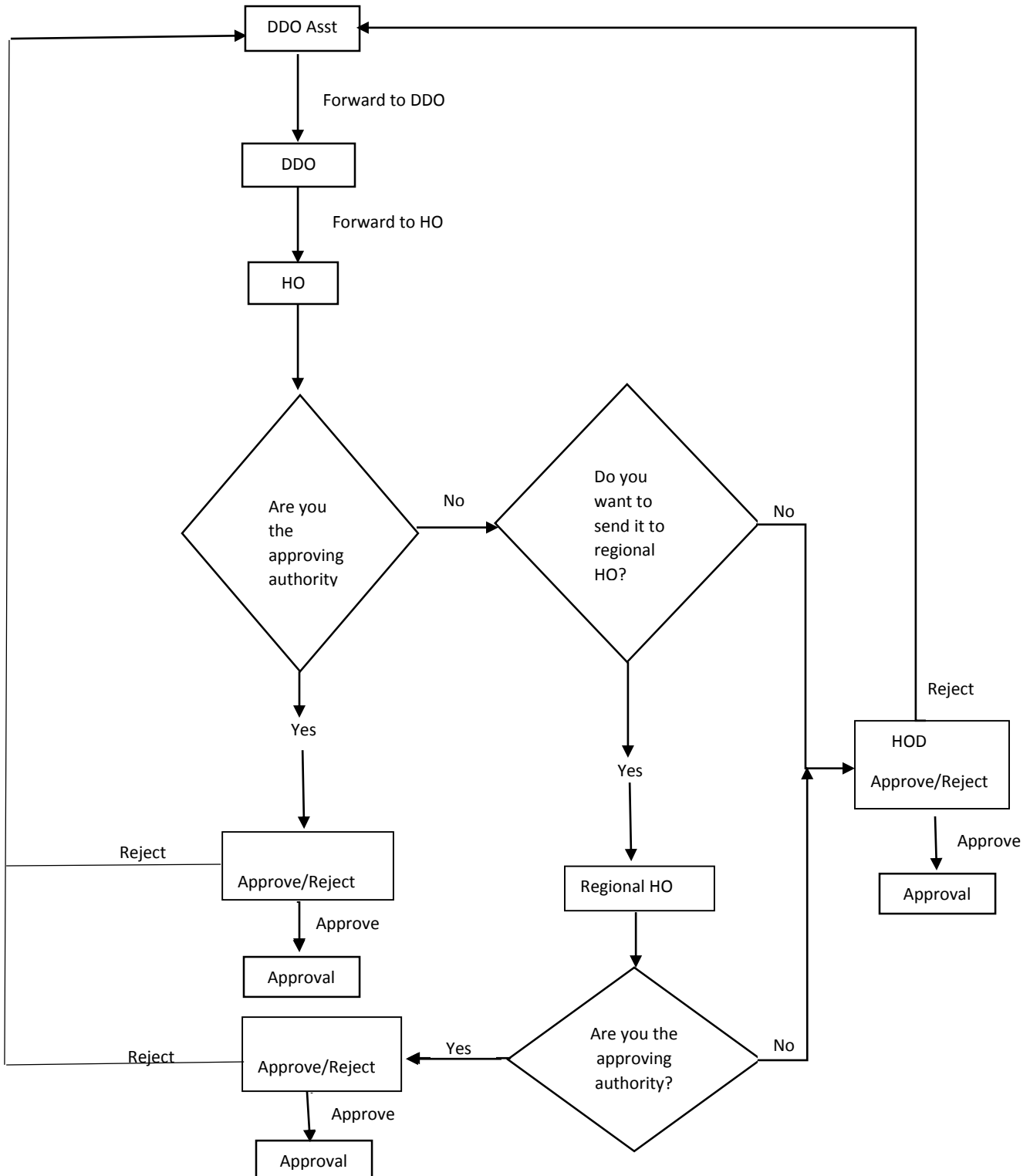


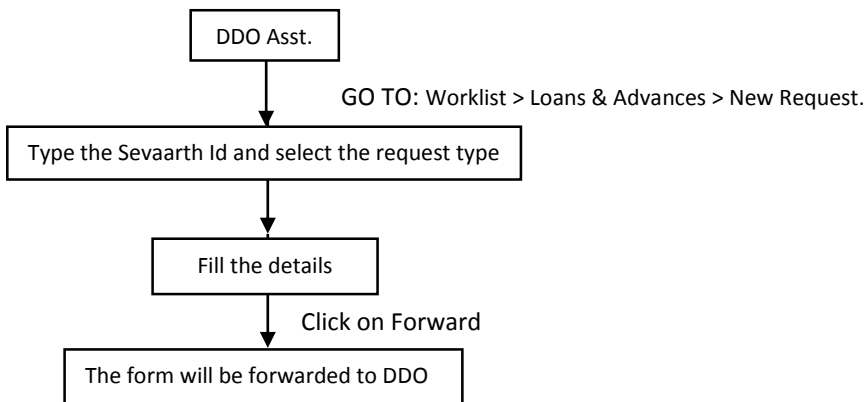
Workflow of loan and advances



Basic steps of Loans and Advances Module

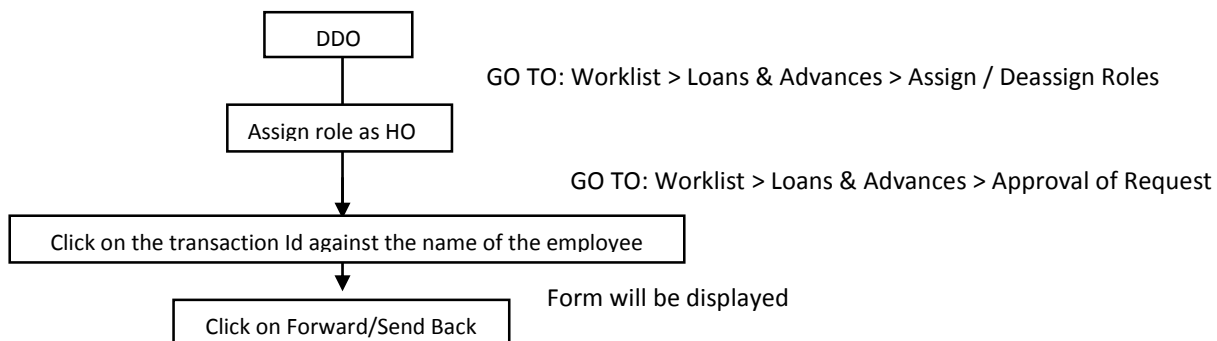
Steps to be followed by DDO Asst.:

- 1) Login into the system with username and password.
- 2) To fill the initial form to apply for a loan the path to be followed is: **Worklist > Loans & Advances > New Request.**
- 3) Type the Sevaarth Id of the employee who wants to apply for loan. Select the request type from the dropdown and click on submit button.
- 4) Fresh form will be opened. Fill the details and click on the "Forward" button.
- 5) The form will be forwarded to DDO.



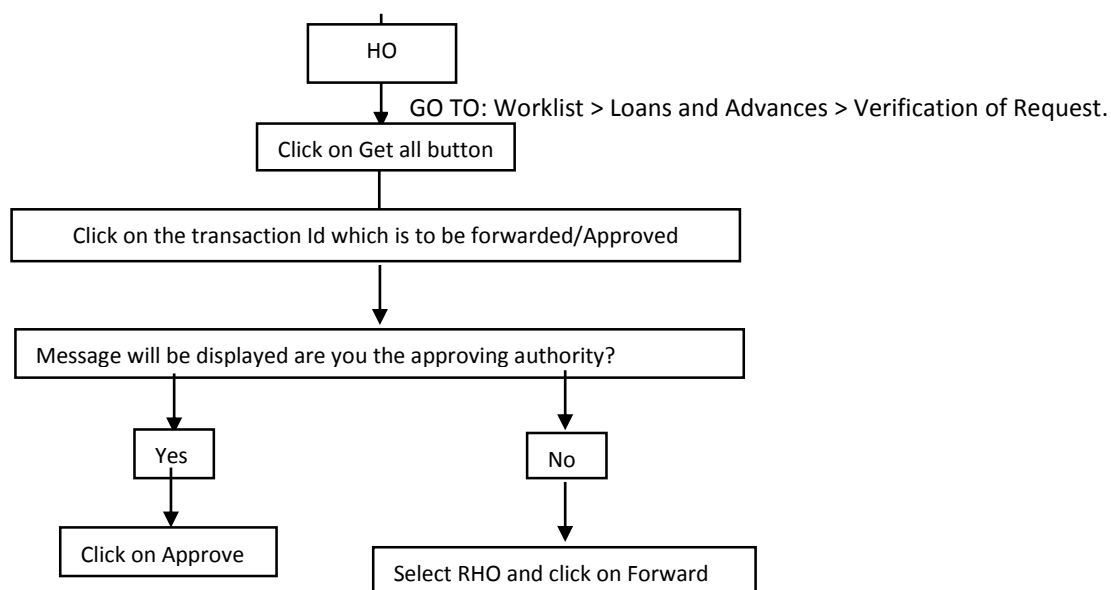
Steps to be followed by DDOs:

- 1) Login into the system with username and password.
- 2) Assign the role of HO among the existing employees of the office.
- 3) To assign the role of HO to employee the path to be followed is : **Worklist > Loans & Advances > Assign / Deassign Roles**
- 4) On the left hand side of the screen all the names of the employees will be displayed. Select the employee and check the corresponding check box against the role on the right hand side of the screen. After checking the check box click on "OK". The employee will be assigned the selected role.
- 5) To verify the new loan request forwarded by DDO Asst. the path to be followed is: **Worklist > Loans & Advances > Approval of Request**
- 6) All the request forwarded by the DDO Asst. will be shown here. Click on the transaction id which is to be forwarded. The form will be displayed.
- 7) If the details filled are correct then click on the forward button to forward the form to HO.
- 8) If the details filled are not correct then click on send back button to send it back to DDO Asst.



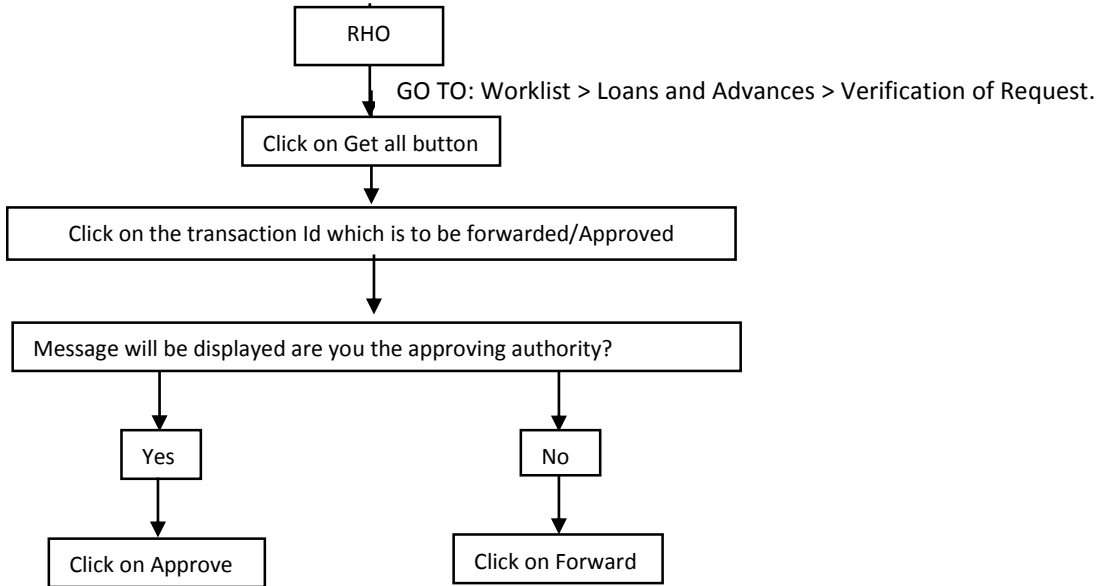
Steps to be followed by HOs:

- 1) Login into the system with Sevaarth Id and password.
- 2) To verify the request forwarded by DDO the path to be followed is: **Worklist >Loans and Advances > Verification of Request.**
- 3) Click on "Get All". All the requests will be displayed which are forwarded by DDO.
- 4) Click on the respective transaction id shown against the name of the employee. One message will be displayed "Are you the approving authority?" If HO is the approving authority then click on "Yes".
- 5) After clicking on yes the form will be displayed. Click on "Approve" button to approve.
- 6) If HO is not the approving authority then click on "NO". After clicking on "NO" the names of the RHOs will be shown. Click on the radio button against the concern RHO.
- 7) Click on "Forward", the request will be forwarded to RHO.
- 8) Click on "Send Back" if the filled details are not correct.
- 9) The rejected requests will be sent back to DDO Asst.



Steps to be followed by RHOs:

- 1) Login into the system with Sevaarth Id and password.
- 2) To verify the request forwarded by DDO the path to be followed is: **Worklist >Loans and Advances > Verification of Request.**
- 3) Click on "Get All". All the requests will be displayed which are forwarded by HO.
- 4) Click on the respective transaction id shown against the name of the employee. One message will be displayed "Are you the approving authority?" If RHO is the approving authority then click on "Yes".
- 5) The form will be displayed. Click on "Approve" if the form is to be approved.
- 6) Click on "Forward" if the request is to be forwarded to HOD. Click on "Send Back" if the filled details are not correct.
- 7) The rejected requests will be sent back to DDO Asst.



Steps to be followed by HODs:

- 1) Login into the system with Sevaarth Id and password.
- 2) To verify the request forwarded by DDO the path to be followed is: **Worklist >Loans and Advances > Verification of Request.**
- 3) Click on “Get All”. All the request will be displayed which are forwarded by RHO.
- 4) Click on the respective transaction id shown against the name of the employee. The form will be displayed.
- 5) Click on “Approve” if the request is to be approved
- 6) Click on “Send Back” if the filled details are not correct.
- 7) The rejected requests will be sent back to DDO Asst.

