SBI HEALTH ASSIST POLICY -YEAR 2023-24

STEP BY STEP GUIDE FOR ONLINE ENROLEMENT/ RENEWAL THROUGH HRMS

After sanction of Pension Proposal and execution of separation action in HRMS, employee can enrol for SBI Health Assist Policy (Yearly Payment Plan) through HRMS portal only. The applicant should verify his address/Mobile No. and email since these will be shared for delivery of services, with SBI General Insurance Co. Ltd., Insurance Broker, respective TPA and e-Pharmacy vendor. The step-by-step guide is as under:

Steps to be followed by Applicant for SBI Health Assist Plan-B membership/ renewal:

1. Pensioner can apply through Pension Self Service→SBI Health Assist (Plan-B) - Apply

2. System displays personal details - details to be checked
   (The employee/ pensioner to check for accuracy of the personal details displayed. For any changes required in the personal details, the same can be changed in the portal, before proceeding to apply for enrolment)

3. Suitable plan to be selected from "Select Plan"
   (Plan details can be viewed by pressing the "click here to view plan details")

4. Family details fetched from system is displayed

5. Final overview page displays selected plan and payment details

6. Undertaking for payment to be ticked before submission for debit.

7. OTP sent to be registered mobile number is to be submitted.

8. Payment reference number and journal number is displayed.

9. By selecting "Download Application Form", the generated SBI Health Assist application form along with payment receipt can be downloaded (The form and payment receipt can also be downloaded by selecting "View" option on the main page any time subsequently)

STEPS TO BE FOLLOWED AT CONCERNED AOs.

AO level: After submission of Applications by retiree, concern AO has to follow undermentioned steps for Approval of membership:

1.Authorised approver at AO/CC level can access through the same menu Manager Approvals→PF/Pension/Gratuity→SBI Health Assist (Plan-B) Approve. Authorised user at AO level can:

a. Approve/Reject individual request.

b. Generate Batch file B1 for onward submission to CC for approval.

c. View Status / Download -Application submitted by pensioner /employee and payment receipt is available for authorised user at AO/CC through the same menu.

d. Download/View B1 report and mail it to **mediclaim@sbi.co.in,** as is being reported presently.