

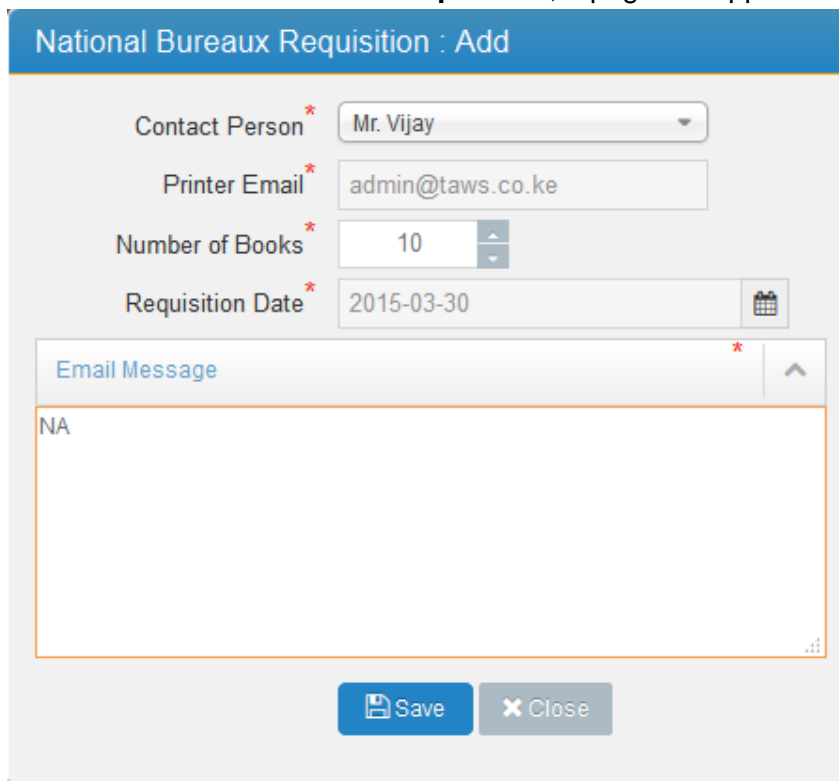
## BASIC YC-MIS USER GUIDE

### YELLOW CARD STOCK MANAGEMENT

#### REQUESTING PRINTER FOR YELLOW CARD BOOKS

To request for yellow card books from the printer, follow these steps:

1. Click Stock->National Bureaux->Books Request List;
2. Click **Add National Bureaux Requisition**, a page will appear as shown below:



The screenshot shows a web form titled "National Bureaux Requisition : Add". The form contains the following fields and values:

- Contact Person\*: Mr. Vijay
- Printer Email\*: admin@taws.co.ke
- Number of Books\*: 10
- Requisition Date\*: 2015-03-30
- Email Message\*: NA


At the bottom of the form, there are two buttons: "Save" and "Close".

3. Fill in the form as required;
4. Click Save.

#### RECEIVING YELLOW CARD BOOKS FROM PRINTER

To receive yellow card books from the printer, follow these steps:

1. Click Stock->National Bureaux->Books Request List, a page will appear as shown below:

Printer Name ▲	Requesting National Bureaux ⇅	Number of Books ⇅	Contact Person ⇅	Requisition Date ⇅	Received ⇅	Pending ⇅	Receive ⇅
Taws Security Printers Limited	SOUTH AFRICAN NB	10	Mr. Vijay	2015-03-30	0	10	

Showing 1 to 1 of 1 entries (filtered from 13 total entries) Previous **1** Next

2. Click Receive, a page will appear as shown below:

**National Bureaux Requisition : Receive**

Number Ordered:

Contact Person:

No of Pages in a Book\*:

Start Serial\*:

Quantity Received\*:

Date Received\*:

State of book:

Remarks\*:

3. Fill in the form as required;
4. Click Save.

### VIEWING CURRENT NATIONAL BURAEU YELLOW CARD BOOKS

To receive view current yellow card books, follow these steps:

1. Click Stock->National Bureaux->Books Request List;
2. Click **Available National Bureaux Stock**, a page will appear as shown below:

Book Number ▼	Start Serial Number ⇅	Last Serial Number ⇅	State of the book ⇅	Action ⇅
33	350200	350249	OK	<input type="button" value="Available"/>
32	350150	350199	OK	<input type="button" value="Available"/>
31	350100	350149	OK	<input type="button" value="Available"/>

Showing 1 to 3 of 3 entries (filtered from 83 total entries) Previous **1** Next

## NATIONAL BUREAU SUPPLY YELLOW CARD BOOKS TO PIC

To supply yellow card books to PIC:

1. Click Stock->National Bureaux->Supply PIC, a page will appear as shown below:

Requesting PIC	Evidence of Payment	Contact Person	NB Requested From	Quantity	Date Requested	Supply
SOUTH AFRICAN PIC		thabo mbeki	SOUTH AFRICAN NB	3	Mar 30, 2015, 12:00 am	

Showing 1 to 1 of 1 entries (filtered from 17 total entries) Previous 1 Next

*Note: National Bureau will only be able supply yellow card books to the PIC, if PIC has made a request for yellow card from the National Bureau.*

2. Click Supply , a page will appear as shown below:

Supply : SOUTH AFRICAN PIC 1 Selected

Transaction Date: 2015-03-30

Number Of Yellow Card Books Requested: 3

Yellow Card Books

<input type="checkbox"/>	Start card no	End card no
<input checked="" type="checkbox"/>	350100	350149
<input type="checkbox"/>	350150	350199
<input type="checkbox"/>	350200	350249


5. Fill in the form as required;
6. Click Proceed.

## PIC REQUEST YELLOW CARD BOOKS FROM THE NATIONAL BUREAU

To request yellow cards from the National Bureau, follow these steps:


1. Click Stock->Primary Insurance Co.->PIC Requisitions;
2. Click **Add**, a page will appear as shown below:

**Requisition**

Requisition Date\*  

Number Of Yellow Card Books Requested

Amount (ZAR)

Mode of Payment  

Ref No

Evidence of Payment  No file selected.

3. Fill in the form as required;
4. Click Save.

### PIC VIEW PENDING REQUEST TO NB FOR YELLOW CARD BOOKLETS

To view pending requests to National Bureau for yellow card books, follow these steps:

1. Click Stock->Primary Insurance Co.->PIC Stock List, a page will appear as shown below:


Book Number	Start Serial Number	End Serial Number	State Of Book	Action
30	350050	350099	OK	<input type="button" value="Available"/>

Showing 1 to 1 of 1 entries (filtered from 83 total entries) Previous  Next

### PIC SUPPLY YC BOOKS TO THE BRANCHES

To supply yellow card books to branches, follow these steps:

1. Click Stock->Primary Insurance Co.->Branch Supplies, a page will appear as shown below:

Date Requested	Requesting Branch	Contact Person	Qty Requested	Qty Supplied	Balance	Supply
Mar 19, 2015, 12:00 am	Pretoria Branch	Robert Marawa	5	1	4	

Showing 1 to 1 of 1 entries (filtered from 10 total entries) Previous  Next

Note: PIC will only be able supply yellow card books to branch, if branch has made a request for yellow card from the PIC.

3. Click Supply , a page will appear as shown below:

Supply : Pretoria Branch 2 Selected

Requisition Date\* 2015-03-30

Quantity 5

Yellow Card Books

<input type="checkbox"/>	Start card no	End card no
<input checked="" type="checkbox"/>	350050	350099
<input checked="" type="checkbox"/>	350100	350149
<input type="checkbox"/>	350150	350199

Close Proceed

4. Fill in the form as required;
5. Click Proceed.

## BRANCH UNDERWRITER REQUESTING FOR YELLOW CARD BOOKS FROM THE MAIN OFFICE

To request yellow card books from main office, follow these steps:

1. Click Stock->Branches->Supplies Requisitions, a page will appear as shown below:

Request **Branch Requisitions**

Show 10 entries Search:

Date Requested	Requesting Branch	Contact Person	Qty Requested	Qty Supplied	Balance	Action
Mar 19, 2015, 12:00 am	Pretoria Branch	Robert Marawa	5	3	2	Success

Showing 1 to 1 of 1 entries (filtered from 10 total entries) Previous 1 Next

- Click Request , a page will appear as shown below:

- Fill in the form as required;
- Click Save.

## YELLOW CARD ISSUANCE

### VIEW CURRENT STOCK LEVEL FOR ISSUANCE

To view current stock level for issuance, follow these steps:

- Click Issuance->Available Stock, a page will appear as shown below:

Book Number ▲	Book start serial Number ⇅	Book end serial Number ⇅	State of Book ⇅	Number Of Yellow Cards in book ⇅	Number Of Yellow Cards issued from book ⇅	Number Of Defective Yellow Cards ⇅	Date Received ⇅
29	350000	350049	OK	50	4	0	0
30	350050	350099	OK	50	0	0	0
31	350100	350149	OK	50	0	0	0

Showing 1 to 3 of 3 entries (filtered from 83 total entries) Previous 1 Next

### ISSUE SINGLE YELLOW CARD TO POLICY HOLDER

To issue a single yellow card to a policy holder, follow these steps:

- Click Issuance->Issues To Motorists->Single Card Issuance, a page will appear as shown below:

**Single Card Issuance : Add**

Y.C. Serial Number\* 350009 ✔ Verified

Primary Policy Number\* 10101

Date Issued\* 2015-03-30

Effective Date\* 2015-03-30

Number of Days\* 7

Name of Insured\* MUSA

Address of Insured\* Pretoria

Vehicle Registration\* ABK 123K

Vehicle Make\* Toyota

Vehicle Type\* Car

Engine Number\* 10101

Chassis Number\* 10101

9. Fill in the form as required;
10. Click Save.

*Note: The system will instantly validate the yellow card upon capture of the yellow card.*

## FLEET ISSUANCE OF YELLOW CARD

To issue YC to policy holder with a fleet of vehicles, follow the steps below:

1. Click Issuance->Issues to Motorists->Fleet Issuance, a page will appear as shown below:

YC Dashboard

Insureds Details

Primary Policy Number:

Name of Insured:

Date Issued:

Currency:

Issuing NB:

Add/Edit

Allocated Vehicles for this Fleet

Add

Yellow Card Number	Plate Number	Action


Process Fleet

2. Click Add/Edit to add the insured's details, a dialogue box will appear as shown below:

**Fleet Issuance : Insureds Details** ✕

Primary Policy Number \*

Name of Insured \*

Date Issued  

Currency \*

Issuing NB \*

Address of Insured \*

3. Click Submit
4. Click add to allocate vehicles for the fleet
5. A Yellow Card Issuance dialogue will appear, complete the form accordingly and click add;
6. Click add to allocate another vehicle for the fleet and proceed as in step 5.

### PRINTING AN ISSUED YELLOW CARD

To print an issued yellow card, follow these steps:

1. Place the pre-printed actual Yellow Card in Tray 1 of the printer. See snapshot below:



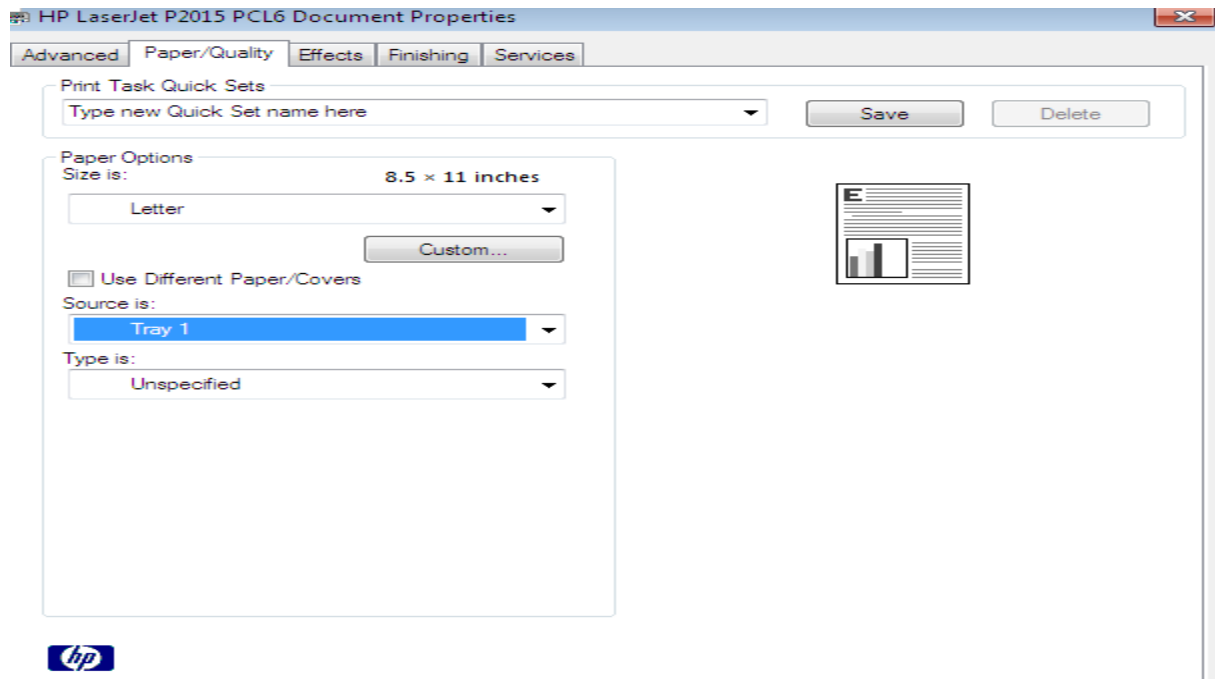
2. Click Issuance-> Issues To Motorists->View/Print Yellow Card, a page will appear as shown below:

2015-03-19	SOUTH AFRICAN PIC	350000	10101	2015-03-19	2015-03-24	MUSA	KBC123B	
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3. Click Print, a dialogue box will appear;



4. On the dialogue box that appears, select the printer name and then Click Properties;
5. On the dialogue box that appears, select the Source as Tray 1. See snapshot below:



6. Click OK, to print.

## CANCELLATION OF THE YELLOW CARD

To cancel a Yellow Card, follow the steps below:

1. Click Issuance->Card Cancellation->Cancel Yellow Card, a page will appear as shown below:

The image shows a screenshot of the 'Issuance : Cancel Yellow Card' dialog box. The title bar is blue with the text 'Issuance : Cancel Yellow Card' and a close button. The main area is light gray and contains four input fields: 'Yellow Card No.' with the value '350002', 'Reason Cancelled' with a dropdown menu showing 'Trip canceled', 'If Other, Indicate' with the value 'NA', and 'Premium Refund' with the value '0'. At the bottom, there are two buttons: 'Cancel' (with a document icon) and 'Close' (with an 'X' icon).

2. Fill in the form as required;
3. Click Cancel

## RENEWAL OF THE YELLOW CARD

To renew a Yellow Card, follow the steps below:

1. Click Issuance->Issues to Motorist->Renewal, a page will appear;
2. Click Renew, a dialogue box will appear as shown below:

Old Y.C. Serial Number	78366
Y.C. Serial Number	Y.C. Serial Number
Primary Policy Number	01008010061302013
Date Issued	Date Issued
Effective Date	Effective Date
Number of Days	182
Name of Insured	RUHINDA LEO
Address of Insured	KAMPALA
Vehicle Registration	UAN 826P
Vehicle Make	Mitsubishi Fuso
Vehicle Type	LORRY
Vehicle Type(Other)	Vehicle Type(Other)

3. Complete the dialogue box accordingly and click Save

## PIC SUBMITS 30% OF THE PREMIUM RECEIVED TO REINSURANCE POOL

To submit 30% of the premium received to Reinsurance, follow these steps:

1. Click Issuance->Cessation Operations->30% Premium Payments, a page will appear as shown below:

Month	March
Year	2014
Premium Amount(USD)	5000
Remarks	NA
Date Paid	2015-03-30

4. Fill in the form as required;

5. Click Save.

## PIC VIEW SUBMISSION HISTORY TO REINSURANCE POOL

To view submission history to Reinsurance Pool, follow these steps:

1. Click Issuance->Issuance History, a page will appear as shown below:

Date Issued ▲	Issued By ⇅	Y.C. Serial Number ⇅	Primary Policy Number ⇅	Valid From ⇅	Valid To ⇅	Issured ⇅	Vehicle Registration ⇅	Premium ⇅
2015-03-19	SOUTH AFRICAN PIC	350000	10101	2015-03-19	2015-03-24	MUSA	KBC123B	10101
2015-03-19	SOUTH AFRICAN PIC	350001	10101	2015-03-01	2015-03-06	MUSA	KBC123A	10101
2015-03-20	SOUTH AFRICAN PIC	350002	10101	2015-03-20	2015-03-25	MUSA	KZN123B	10101
2015-03-20	SOUTH AFRICAN PIC	350003	10101	2015-03-01	2015-03-02	MUSA	KZN123B	10101
2015-03-25	SOUTH AFRICAN PIC	350005	10101	2015-03-25	2015-03-30	MUSA	KBC123B	10101

Showing 1 to 5 of 5 entries (filtered from 24 total entries) Previous **1** Next

## NB CONFIRMS THE 30% SUBMITTED BY PIC TO REINSURANCE POOL

To confirm the 30% submitted by PIC to Reinsurance Pool, follow these steps:

1. Click Issuance->Cessation Operations->Payment History, a page will appear as shown below:

Premium Amount(USD) ▲	Month ⇅	Year ⇅	Date Paid ⇅	Paid By ⇅	Remarks ⇅	Action ⇅
1000	March	2014	2015-03-20	SOUTH AFRICAN PIC	NA	<b>Confirm</b>
1000	February	2014	2015-03-21	SOUTH AFRICAN NB	NA	<b>Confirm</b>

Showing 1 to 2 of 2 entries (filtered from 5 total entries) Previous **1** Next


2. Click Confirm.


## NB VIEW FINANCIAL STATUS OF PIC


To view Financial Status of PICS, follow these steps:

1. Click Issuance->View Financial Status, a dialogue box will appear as shown below:

### View Financial Status ✕

**Report From (Date)**  
 

**Report To (Date)**  
 

**Filter By Organization**  
 

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### Report Destination

PDF,  
 XLS  
 CSV  
 HTML

2. Click Proceed to view the report.




## YELLOW CARD CLAIMS

### NB REPORTING AN ACCIDENT & VERIFYING THE YELLOW CARD

To report an Accident, follow the steps below:

1. Click claims->Report and Accident, a dialogue box will appear as shown below:
2. Complete the dialogue box accordingly and click Save

Claims : Enter Accident Details
✕

Accident Report Date	<input type="text" value="2016-04-15"/> 
Date Of Loss	<input type="text" value="2016-04-15"/> 
Y.C. Serial Number *	<input type="text" value="ZAM100051"/>
Country Of Accident *	<input type="text" value="ZAMBIA"/> 
Place Of Accident *	<input type="text" value="LUSAKA"/>

Accident Description \*

ACCIDENT DESCRIPTION|HERE.

## NB RECORDING CLAIM DETAILS

To record Claim Details, follow the steps below:

1. Click Claims->Record Claims ->Record Claims Details, a dialogue box will appear as shown below:

**Claims : Record Claims Details** [X]

Yellow Card No\* [Yellow Card No]

Issuing PIC\* [Issuing PIC]

Issuing NB\* [Issuing NB]

Handling Bureau\* [Handling Bureau]

Primary Policy Number\* [Primary Policy Number]

Claim Number\* [Claim Number]

Date Of Loss\* [Date Of Loss] [Calendar Icon]

Name Of Issured\* [Name Of Issured]

Vehicle Registration\* [Vehicle Registration]

Use Of Vehicle\* [Use Of Vehicle]

Nature and Cause of Loss\* [Nature and Cause of Loss] [Up Arrow Icon]

2. Complete the dialogue box accordingly and click Save.