



Perbadanan Insurans Deposit Malaysia
Protecting Your Insurance And Deposits In Malaysia

GUIDE TO USING THE PIDM INDUSTRY PORTAL
("MI USER MANUAL")
MI SERVICE REQUEST

ISSUE DATE : 31 MARCH 2023



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Protecting Your Insurance And Deposits In Malaysia

Ref No	PIDM/UG4-A1/2023 (IPS-MISR)	Version No	2.0
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[Update] Notice for Change in Terminology:

Existing terms reflected in this document	Updated terms reflected in the PIDM Industry Portal
MI Users	MI Users / Others
Member Institution	Member Institution / Others
MI	MI / Others
MI Officer	MI Officer / Others
Printed Membership Representative Publication	Printed Membership Representation Publication
Electronic Membership Representative Publication	Electronic Membership Representation Publication

Please note that there is no implication on the function and usage of the PIDM Industry Portal resulting from the update above.

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Brief Description

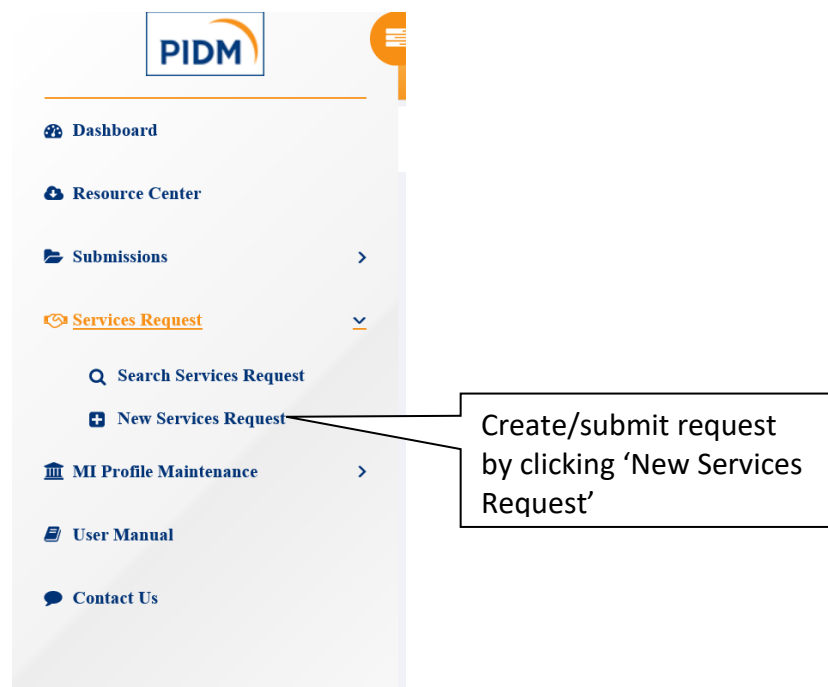
This allows authorised MIPLO/ MI Officer who has contribute access right to the Services Request (SR) module to create new requests, edit the SR details, submit and discard the SR.

Basic Flow

1. Go to "Services Request" menu, and select "New Services Request".
2. System redirected to a Request data entry page. System prompts user to select a request type.
3. System display the request data entry form according to the selected request type.

SECTION 1: REQUEST FOR PIDM BROCHURES

Step 1: Go to "Services Request" menu, and select "New Services Request". System redirected to a Request data entry page. System prompts user to select a request type.





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Select Request Type

Select 'Brochures' from dropdown list

Briefing
Briefing
Brochures
Electronic Membership Representative Publication
Printed Membership Representative Publication

Step 2: Fill in all mandatory inputs and select required brochure types and quantity.

Request Details

Request Type: Brochures

Request Reason *

Pickup Address *: Warehouse

Type of Brochures

Type	Quantity (Per pack of 500 pcs)
<input type="checkbox"/> Deposit Insurance System (EN/BM)	0
<input type="checkbox"/> Deposit Insurance System (CH/TM)	0
<input type="checkbox"/> Takaful and Insurance Benefits Protection System (EN/BM)	0
<input type="checkbox"/> Takaful and Insurance Benefits Protection System (CH/TM)	0

System auto generates the Service Request (SR) reference number when saved/submitted

Fill in required quantity

Tick the box to select required brochure type(s)

Save the draft SR if yet to complete

Click 'Submit' after completing all mandatory fields

Save Submit

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SECTION 2: REQUEST FOR PIDM MEMBERSHIP REPRESENTATION

PIDM Membership Representation available in Two (2) formats:

1. Electronic Membership Representation
2. Printed Membership Representation

1. Electronic Membership Representation

Step 1: Go to "Services Request" menu, and select "New Services Request". System redirected to a Request data entry page. System prompts user to select a request type.

The screenshot shows a dropdown menu titled "Select Request Type". The menu is open, displaying four options: "Electronic Membership Representative Publication", "Briefing", "Brochures", and "Printed Membership Representative Publication". The option "Electronic Membership Representative Publication" is highlighted in blue.

Step 2: Select the file format and submit after completing all mandatory inputs.

The screenshot shows the "Request Details" form. The "Request Type" field is set to "Electronic Membership Representative Publication". The "Request Reason *" field is empty. The "File Format *" field is open, showing a list of file formats: "Select All", "Adobe Illustrator File (.AI)", "Joint Photographic Experts Group (JPEG)", "Portable Document Format (PDF)", and "Deselect All". A red dashed circle highlights the "Select All" option. A callout box points to the "Select All" option with the text "Select required file format, multiple selection". The "Submit" button is visible at the bottom right.

2. Printed Membership Representation

Step 1: Go to "Services Request" menu, and select "New Services Request". System redirected to a Request data entry page. System prompts user to select a request type.



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Select Request Type

- Printed Membership Representative Publication
- Briefing
- Brochures
- Electronic Membership Representative Publication
- Printed Membership Representative Publication**

Step 2: Submit after completing the required quantity and all mandatory inputs.

Request Details

Request Type	Printed Membership Representative Publication	Reference No	
Request Reason *	<input type="text"/>		
Quantity (Pcs) *	<input type="text"/>	Mode of Delivery *	Self Collect
Pickup Address	HQ		

Fill in the reason of request and required quantity

Save Submit

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SECTION 3: REQUEST FOR BRIEFING

This is for MI that require an awareness briefing on PIDM Financial Consumer Protection Systems.

Step 1: Go to "Services Request" menu, then select "New Services Request". System redirected to a Request data entry page. System prompts user to select a request type.

Select Request Type

- Briefing
- Brochures
- Electronic Membership Representative Publication
- Printed Membership Representative Publication

Step 2: Submit after completing all mandatory inputs.

Request Details

Request Type	Briefing	Reference No	
Request Reason *	<input type="text"/>		
Briefing Date time *	<input type="text"/>	Briefing Duration (in minutes) *	<input type="text"/>
No of Pax	<input type="text"/>	Venue Address	<input type="text"/>

Note:

Upon the SR is submitted, system will generate email notification to the submitter, and CC to other MI LO from the same MI who has contribute access to Services Request Module and the Primary LO. Submitted request is no longer editable by MI LO.

For Brochures and Printed Membership Representative Publication request types, system will update the SR status to "Pending Requestor Sign Off" upon PIDM LO processed the services request.



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Requestor should sign off the services request after collected the brochures or membership representative publication. However, System will auto sign off "Pending Requestor Sign Off" the SR 3 days after target collection date.

For other services request types, the SR status is updated to "Completed" upon PIDM LO processed the services request.

SECTION 4: ALTERNATE FLOWS

Edit Draft

1. User can edit a draft request anytime before submitting. User can use the "Search SR" function to locate specific draft request to edit.

Discard Draft SR before submitting

1. To discard a draft request, click the "Discard" button.
2. The request status will be updated to "Discarded" and the request is no longer editable.

Request Details

Request Type: Brochures Reference No: AXALIFE20200068

Request Reason *: display

Pickup Address *: Warehouse

Type of Brochures

	Type	Quantity (Per pack of 500 pcs)
<input checked="" type="checkbox"/>	Deposit Insurance System (EN/BM)	5
<input type="checkbox"/>	Deposit Insurance System (CH/TM)	0
<input type="checkbox"/>	Takaful and Insurance Benefits Protection System (EN/BM)	0
<input type="checkbox"/>	Takaful and Insurance Benefits Protection System (CH/TM)	0

Buttons: Save, Submit, Discard

Annotations:
- "To edit the draft request" points to the checkboxes in the table.
- "To submit or discard the draft request" points to the Submit and Discard buttons.



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Abort Submitted SR before the SR is completed

1. To abort a submitted request, click the "Abort" button.
2. The request status will be updated to "Aborted".
3. System will send "SR Aborted" email to the MI LO who aborted the request and "PIC Email", CC to other MI LO from the same MI who has contribute access to the "Services Request" Module and the Primary LO.

Request Details

Request Type	Electronic Membership Representative Publication	Reference No	AXALIFE20200067
Request Reason *	for display		
File Format *	Adobe Illustrator File (.AI) x Joint Photographic Experts Group (JPEG) x Portable Document Format (PDF) x		

Workflow Remark

Comments	<input type="text" value=""/>
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Reason/Feedback is required!

Reason is required for aborting SR

[Abort](#)

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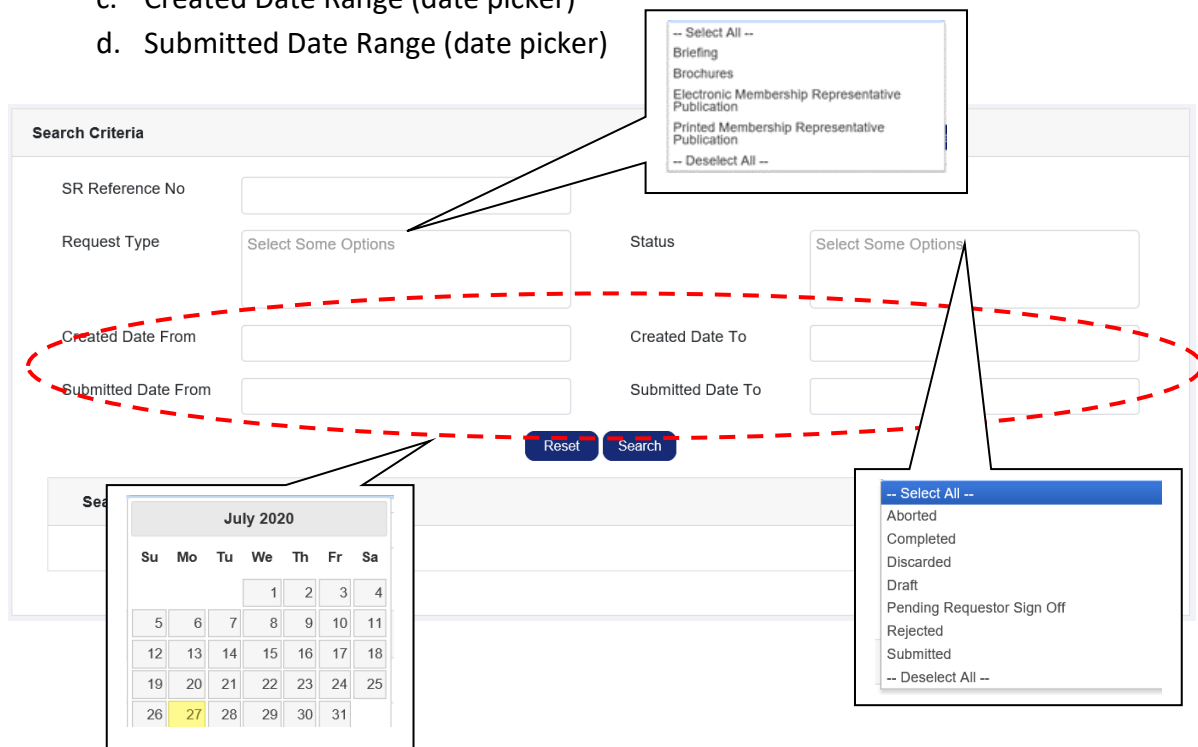
SECTION 5: SEARCH SERVICE REQUEST

Brief Description

This allows all user who has access right to Services Request module to search SR. MI LO can view requests created/ submitted for their own MI.

Basic Flows

1. Go to "Services Request" menu, and select "Search Services Request".
2. System display the following search criteria:
 - a. Request Type (multi-select dropdown list)
 - b. Status (multi-select dropdown list)
 - c. Created Date Range (date picker)
 - d. Submitted Date Range (date picker)



The screenshot shows a 'Search Criteria' form with the following fields:

- SR Reference No:
- Request Type:
- Status:
- Created Date From:
- Created Date To:
- Submitted Date From:
- Submitted Date To:

At the bottom of the form are 'Reset' and 'Search' buttons. A red dashed oval highlights the date range fields. Callouts show:

- A multi-select dropdown for Request Type with options: -- Select All --, Briefing, Brochures, Electronic Membership Representative Publication, Printed Membership Representative Publication, -- Deselect All --.
- A multi-select dropdown for Status with options: -- Select All --, Aborted, Completed, Discarded, Draft, Pending Requestor Sign Off, Rejected, Submitted, -- Deselect All --.
- A date picker for July 2020 with the 27th highlighted.