

पोर्टल की सरलीकरण के प्रयासों का संकलन  
Ease of Access Kit for Handholding Agencies



**sidbi**

*The document is a compilation of the continued steps being taken to ease the digital access to financial and handholding services. It aims to address the expectations of stakeholders.*

*For any clarifications or better understanding please contact the portal team.*

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*This kit endeavours to promote green growth. Unless necessary please do not print.*

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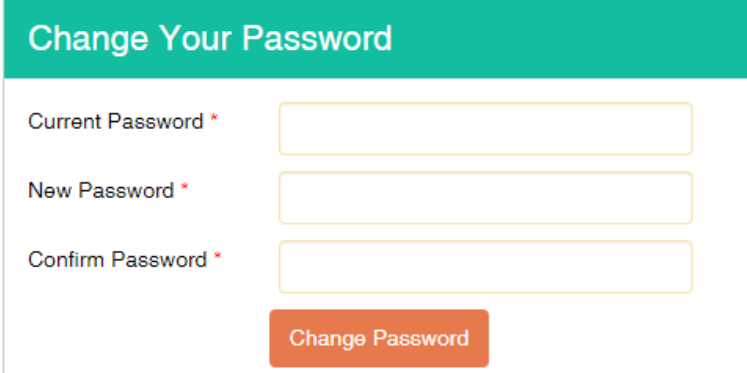
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## On Boarding of Handholding Agencies on Portal :

Handholding Agencies (HHA) are provided with username/ password for logging on to the portal. Upon first login, HHA are prompted to change the password, and update their profile.



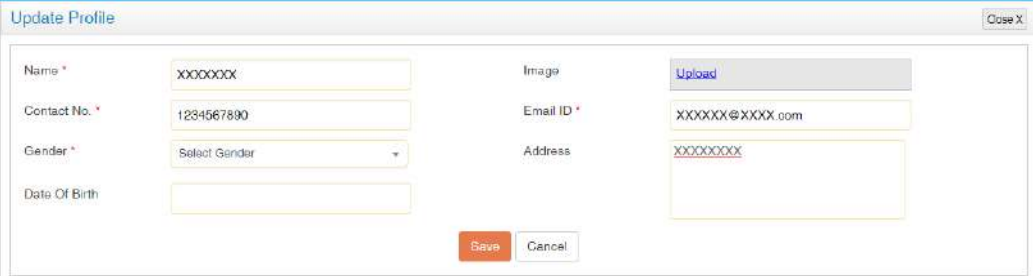
**Change Your Password**

Current Password \*

New Password \*

Confirm Password \*

[Change Password](#)



**Update Profile** Close X

Name \*  Image

Contact No. \*  Email ID \*

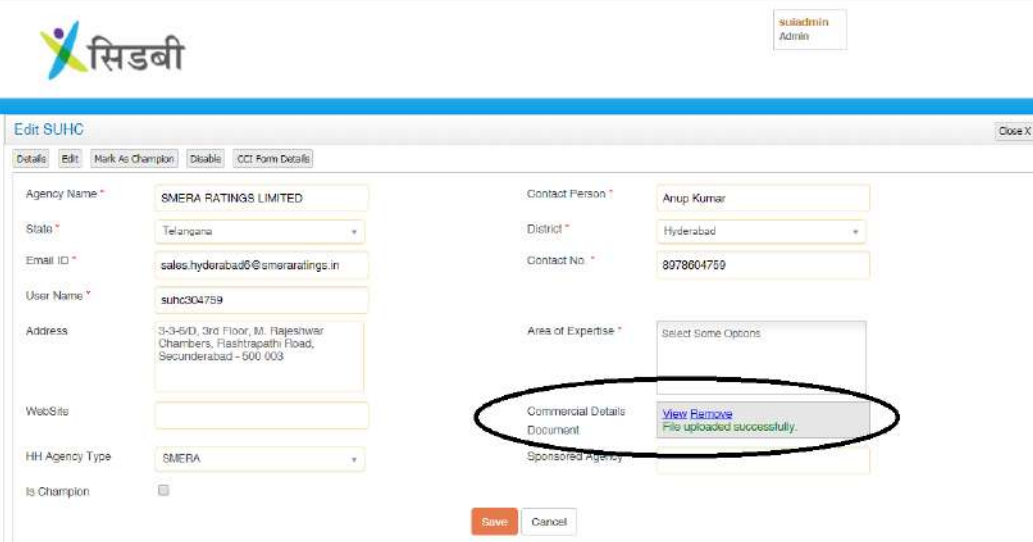
Gender \*  Address

Date Of Birth

[Save](#) [Cancel](#)

## Schedule of Charges

Upon successful login HHAs can add their schedule of charges which can be viewed by the Applicant while choosing the agency. The schedule of charges can be viewed by the Applicant while choosing the HH agency.



**सिडबी** suadmin Admin

**Edit SUHC** Close X

[Details](#) [Edit](#) [Mark As Champion](#) [Disable](#) [OCI Form Details](#)

Agency Name \*  Contact Person \*

State \*  District \*

Email ID \*  Contact No. \*

User Name \*  Area of Expertise \*

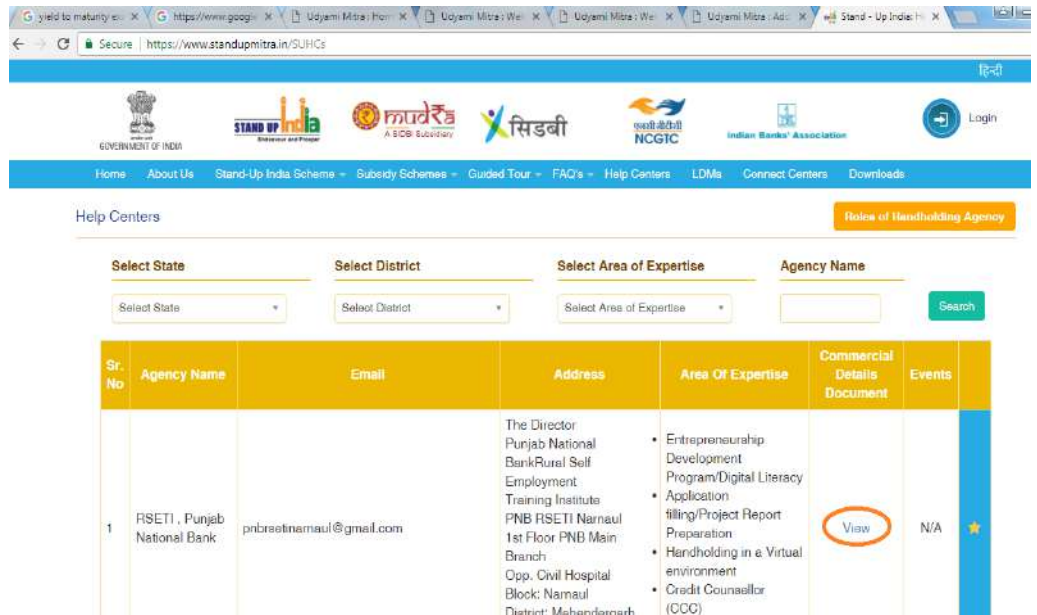
Address

WebSite

HH Agency Type  Commercial Details Document [View](#) [Remove](#)  
File uploaded successfully.

Is Champion  Sponsored Agency

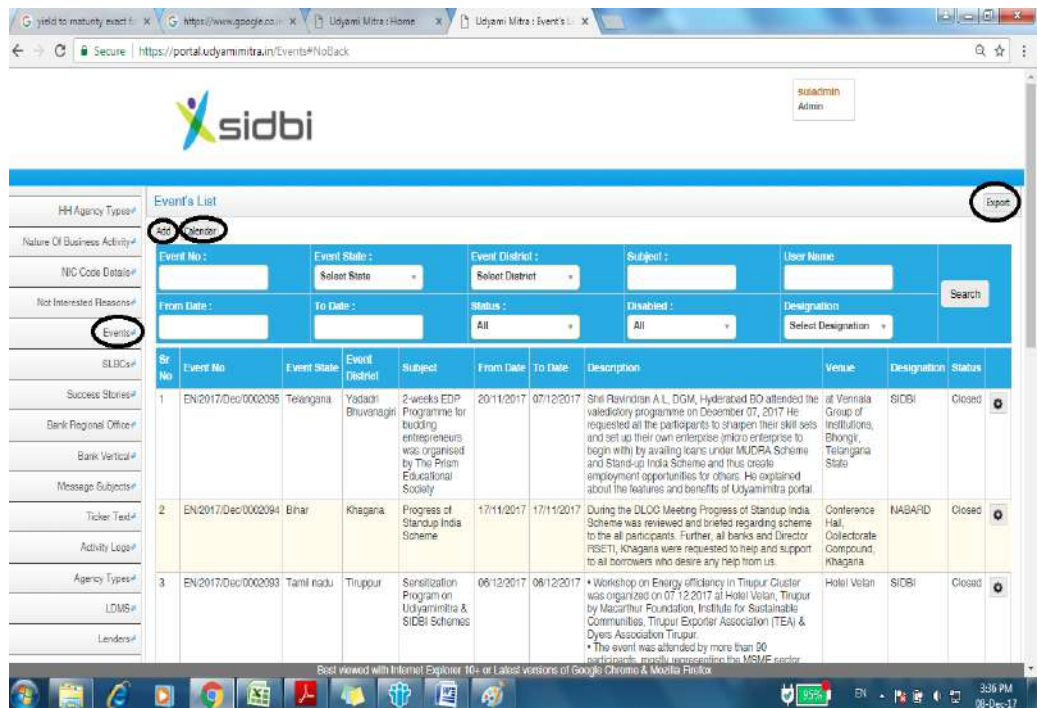
[Save](#) [Cancel](#)



## Calendar of Events:




Handholding Agencies can create their calendar of events by following below steps :

- Clicking on Events on the menu (available under Masters menu), brings up the consolidated calendar of Events on the portal.
- Default view is a list view which can be exported into excel also.
- To see the calendar view click on Calendar as marked
- To Add an event click on Add or in the calendar view double-



click on the date of the event

- Clicking on Gear icon allows Edit, Detailed view, closure etc.

- The events are colour coded :
  - MAROON - HH agencies
  - Various filters are available to only view required events.
  - User creating an event can only edit it
  -  - completed event
  -  -event due but not marked complete
  -  - event scheduled for future



- In the Add / Edit Event, the State, District, From and to dates, subject, description, contact no. of event arranger, venue, no. of participants and an attachment in .pdf form can be uploaded (for report on the event. Photos if any has to be included in the pdf attachment).



- All events have to be marked closed.

- Applicants can see the Calendars against each HH agency by clicking on the **calendar icon**. It would help them to select the agency based on programmes organized by these agencies.

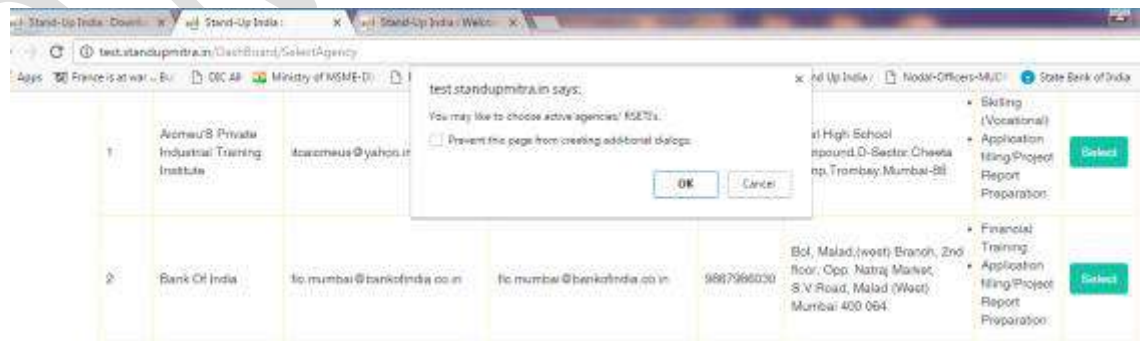
Sr.No.	Agency Name	WebSite	Contact Details	Address	Area Of Expertise	Commercial Details Document	Events	
1	Vikhroli-Center	shuddhodan.s@inlaboumet.in	9702227778	Godrej & Boyce mfg.co.ltd. Plant No 1, Above security control room, phirosha nagar, vikhroli mumbai Mumbai Dist,Maharashtra-400079 Above CSR office, 400079	• Skilling (Vocational) • Application filling/Project Report Preparation	N/A		
2	The Childrens Aid Societys Pvt. Industrial Training Institute Mankhurd	itccas@yahoo.com	9869879010	I.T.I. Agarwadi Road, Mankhurd, Mumbai-400088	• Skilling (Vocational) • Application filling/Project Report Preparation	N/A		
3	St.Josephs Technical School Private Industrial	itc35stjosephskuria@yahoo.com	9882456368	Premier Automobiles Road, Kurla (West)	• Skilling (Vocational) • Application filling/Project Report	N/A		

Messaging module has been introduced in the portal by which Handholding Agencies can interact with applicants for responding to clarification requested, update about venue and schedules etc..



## Applying for an Handholding Request on Portal :

When applicant is selecting a handholding agency, the activated agencies (those who have activated their user id and password on portal) are shown on Top. In case any inactive agency is selected by the applicant, a warning





message is displayed to the applicant to the effect that this agency is not yet activated on portal.

While selecting the handholding agency, agency contact details and email id has been made available to the applicant to get necessary handholding support expeditiously.

Sr.No.	Agency Name	Email	WebSite	Contact Details	Address	Area Of Expertise	
1	Aiomeu'S Private Industrial Training Institute	itcaioemeus@yahoo.in	itcaioemeus@yahoo.in	9920248466	Ideal High School Compound,D-Sector,Cheeta Camp,Trombay,Mumbai-88	<ul style="list-style-type: none"><li>• Skilling (Vocational)</li><li>• Application filling/Project Report Preparation</li></ul>	Select

DOM

## Responding to Handholding Requests on Portal :

### Handholding

Agencies can access their dashboard after login where they can see pending requests. To attend to these requests, SUHCs have to click on 'Hand Holding Requests' tab link appearing on the left.

Subsequently, the SUHC can click on the Gear Button appearing next to each request to view the 'Applicant Details', mark the request as 'Interested' or 'Not Interested'.

The image shows two screenshots of the Udyami Mitra portal. The top screenshot displays the dashboard with the following statistics:

Message Statistics	
Applicants Total Unread Messages [Total : 3907]	: 0
User's Total Unread Messages [Total : 3194]	: 0

Handholding Statistics	
Total HandHolding requests received	: 1
<b>Total HandHolding requests pending more than 15 days</b>	<b>: 1</b>
Total HandHolding requests completed by Applicant	: 0
Total HandHolding requests cancelled by Applicant	: 0
Total HandHolding requests cancelled by SUHCs	: 0
Total HandHolding requests completed by SUHCs	: 0

The bottom screenshot shows the 'Hand Holding Request's List' page with the following table:

Sr No	Request No.	Name of Applicant	Name of Enterprise	Scheme Name	Area of Expertise	Service Requested Date	Completion Date	Applicant Status	IFI Agency Status
1	Req/1120179084	INDU PANDEY		Other MSME	Application filling/Project Report Preparation/Skilling (Vocational)	22/11/2017	N/A	Pending	N/A

Hand Holding Request's List

Request No. [ ] Name of Applicant [ ] Name of Enterprise [ ] Scheme : Select Scheme

Area of Expertise [ Select Area of Ex... ] Select Date Range : Requested Date Range: From Date : [ ] To Date : [ ] Status : All [ ] Search

Sr No	Request No.	Name of Applicant	Name of Enterprise	Scheme Name	Area of Expertise	Service Requested Date	Completion Date	Applicant Status	HH Agency Status
1	Req/1120179684	INDU PANDEY		Other MSME	Application filling/Project Report Preparation Skilling (Vocational)	22/11/2017	N/A	Pending	N/A

Dropdown menu options: Applicant Details, Message To Applicant, Interested, Not Interested

Handholding agencies have now been given option to mark the request as 'Not Interested' in case they do not possess the required expertise to attend to the request. However the moment they mark it so a mail emanates to the applicant.

Hand Holding Request's List

Request No. [ ] Name of Applicant [ ] Name of Enterprise [ ] Scheme : Select Scheme

Area of Expertise [ Select Area of Ex... ] Select Date Range : Requested Date Range: From Date : [ ] To Date : [ ] Status : All [ ] Search

Sr No	Request No.	Name of Applicant	Name of Enterprise	Scheme Name	Area of Expertise	Service Requested Date	Completion Date	Applicant Status	HH Agency Status
1	Req/1120179684	INDU PANDEY		Other MSME	Application filling/Project Report Preparation Skilling (Vocational)	22/11/2017	N/A	Pending	N/A

Dropdown menu options: Applicant Details, Message To Applicant, Interested, Not Interested

Auto alerts are enabled when handholding requests are marked as 'Completed'/'Cancelled' by the agency.

**HandHolding Agency Service Completed successfully**

**Dear Sumit Sidharth Lokhande,**

You have reported closure of the following services availed from Bank Of Maharashtra agency:

1. "Financial Training"
2. "Application filling/Project Report Preparation"

For any further assistance, please contact your Lead District Manager.

Thanks for availing portal facilities for handholding support. Please utilise portals credit connect facilities. we look forward to your boarding or referrals to others to use the portal. ☐

**Regards,**  
Portal Team

**Disclaimer :** "This portal facilitates access to loans and other handholding services. Applying through portal does not confirm/guarantee availability of services or sanction of loan by banks as it shall depend on the viability as perceived by banks".

### Managing Handholding Requests/ Agencies by SUCCs :

SUCCs can now mark a Handholding Agency as Champion agency based on its dependability, reliability and past performance.

Sr No	State	District	Area of Expertise	Agency Name	Contact Person	Email ID	Contact No.	Address	Is Champion	Is Login	Last Logged In Date
1	Chhattisgarh	Raipur	Application filling/Project Report Preparation Mentoring	Central Institute Of Plastics Engineering & Technology (CIPET),Raipur,	Mr. Avneet Kumar Joshi, Chief Manager (Project) & Head	cipetraipur@gmail.com	0771655512	Plot No.48, Industrial Area Bhanpuri, Near Urkura Railway Station, Bhanpuri Raipur-493221 (CG)	No	No	
2	Chhattisgarh	Mungeli	Application filling/Project Report Preparation Entrepreneurship	GRAMIN UTTAN SEWASHRAM SAMITI, MUNGELI	R.K. THAKUR	rkjuss3@gmail.com	9893209823	Heed Off- Near Old Water Tank, Mungeli Dist. Mungeli (C.G.) Branch Off - CLC	No	Yes	09/01/2017 18:10:09

SUCCs can also reallocate the SUHC to the Champion Agency for a handholding request which is pending for a long time to have a faster resolution.

**Hand Holding Statistics**

State: Chhattisgarh District: Raipur Agency Name: Select Agency Name... District: All

Area of Expertise: Select Area of Ex... Request Date: From Date: To Date: Search

Sr No	Agency Name	Area of Expertise	Contact Person	Contact No.	Email ID	Total Requests
1	Micro, Small & Medium Enterprises Development Institute (MSME-DI)	Entrepreneurship Development Program/Digital Literacy	Shri P. Ravi, Director		cdlog@wooditmail.com	1
2	District Industries Centre	Application Filing/Project Report Preparation / Margin money re-advise/ Mentoring Workshop Requirement	Chief General Manager	8126515/18	dticraipur@gmail.com	3
3	Dena Bank	Application Filing/Project Report Preparation Financial Training	S MONDAL	7369943198	fo.raipur@denabank.co.in	1
4	WITS & WYILS COMPU/LRS	Application Filing/Project Report Preparation Billing (Vacklamw)	HO Principal	9826111321	pawanraipur@wooditmail.com	1

**Hand Holding Request's List**

Request No. Name of Applicant Name of Enterprise Business Activity

Scheme: Select Scheme Date Range: Select Date Range: From Date: To Date: Status: All Search

Sr No	Request No.	Name of Applicant	Name of Enterprise	Industry	Scheme Name	Nature of Business activity	Service Requested Date	Completion Date	Applicant Status	HH Agency Status
1	Req/1220164679	hemlalmiri	manish computers and hardware / manish common service center	Services	Other		24/12/2016	N/A	Pending	N/A
2	Req/1220164512	deev narayan sinha	skill academy	Services	Kishor	skill/vocational training	17/12/2016	N/A		
3	Req/1020163372	rajanikant yadu	poultry farm	Manufacturing	Other		29/10/2016	N/A	Pending	N/A
4	Req/0620160937	Ishan Nag		Trading	Stand-Up India		19/06/2016	N/A	Pending	N/A

**Change HH Agency**

Request No: Req/1220164679 Name of Applicant: hemlalmiri

Name of Enterprise: manish computers and hardware / manish common service center Area of Expertise: Entrepreneurship Development Program/Digital Literacy

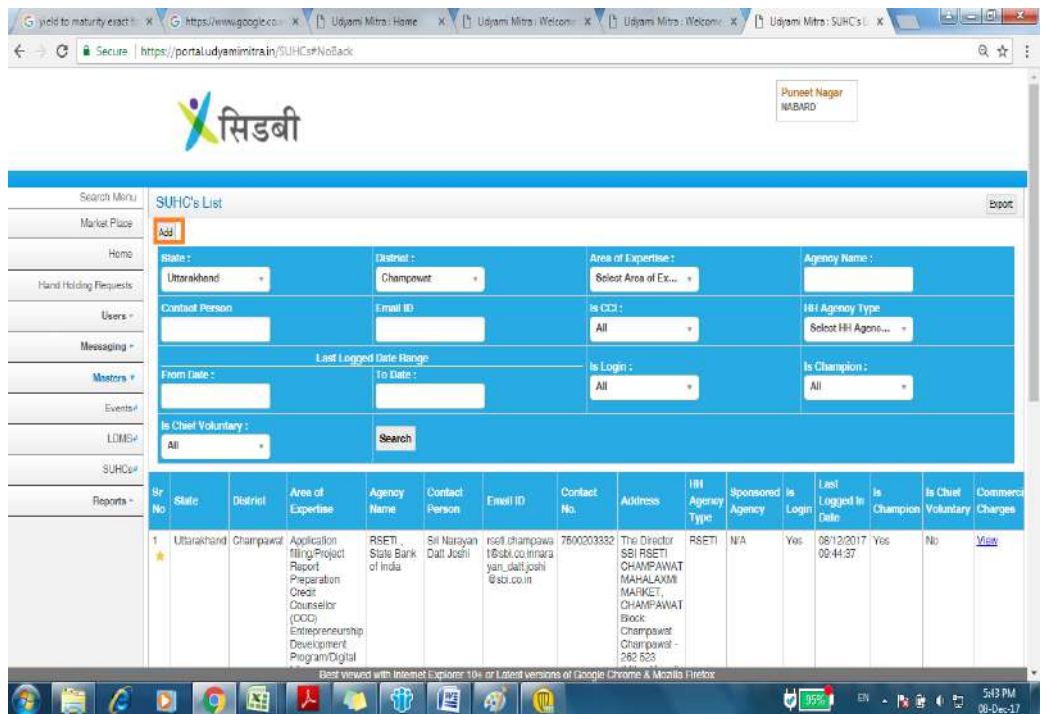
Handholding Agency: Micro, Small & Medium Enterprises Development Institute (MSME-DI) State: Chhattisgarh

District: Raipur New Handholding Agency: Select Handholding Agency

Save Cancel

Select Handholding Agency: AADARSH NURSING INSTITUTE, aaryabhata training center, Adarshdeep Akshita Purnima Kendra, Chhura

SUCCs can add Handholding Agency and create username and password for them. In order to do so, click on Masters -> SUHCs->Add -> Fill Up the necessary details and save. The newly created username and password may be then shared with the SUCC concerned.



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Project Page  
NA/2010

Select Menu  
Market Place  
Home  
New History Requests  
Users  
Messaging  
Markets  
Events  
LDWR  
SJCAR  
Reports

### Add SUHC

Agency Name \*

State \*  
Select State

Email ID \*

User Name \*

Address

Website

HI Agency Type  
Select HI Agency Type

is Champion

Contact Person \*

District \*  
Select District

Contact No. \*

Password \*

Area of Expertise \*  
Select Some Options

Commercial Details  
Document  
[Upload](#)

Sponsored Agency

[Save](#) [Cancel](#)

Best viewed with Internet Explorer 10 or Latest versions of Google Chrome & Mozilla Firefox

5:41 PM  
14-Dec-17

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## Handholding in a Virtual Environment (HAVE) - A new Area of Expertise for Handholding Agencies (HHA) :

Presently (after choosing an handholding agency online for support) applicants have to reach out physically to handholding agency. Most of the handholding requests are for application filing and DPR (wherever applicable) preparation. Based on interaction with various applicants and HHAs on the portal, it was felt that if some agency helps them in filling the application form online; it would be of great help. It shall help in saving time and efforts.

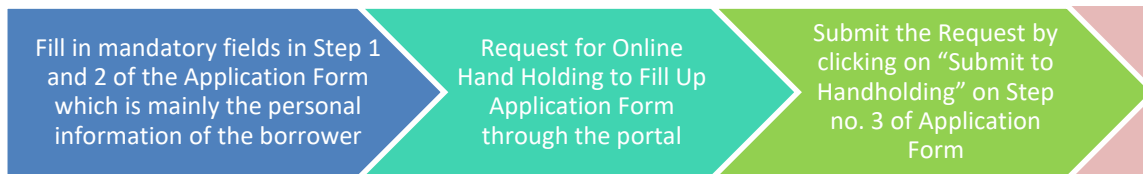
To facilitate borrowers in filling loan application forms (on the portal), we have introduced a new feature 'Handholding in a Virtual Environment' (HAVE), on the portal which may be used by HHAs to provide service by filling in the application form online on behalf of the applicant and sending the filled in application form back to the applicant for submission through the portal. This does not even require the applicant to visit the HHA office and enables the HHA also to analyze the requirements and fill up the applicant form on behalf of the applicant.

<i>Main features</i>	
<i>Applicant partially fills the application form (mainly personal details) and sends it to HHA</i>	<i>Use Messaging on the portal to communicate between the parties</i>
<i>HHA can fill up the remaining part of the form online and send it back to Applicant</i>	
<i>Applicant can review / make changes and Submit</i>	



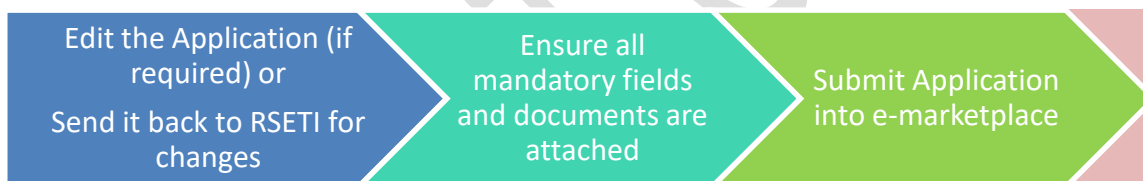
## APPLICANT'S LEVEL

The detailed process is as follows:



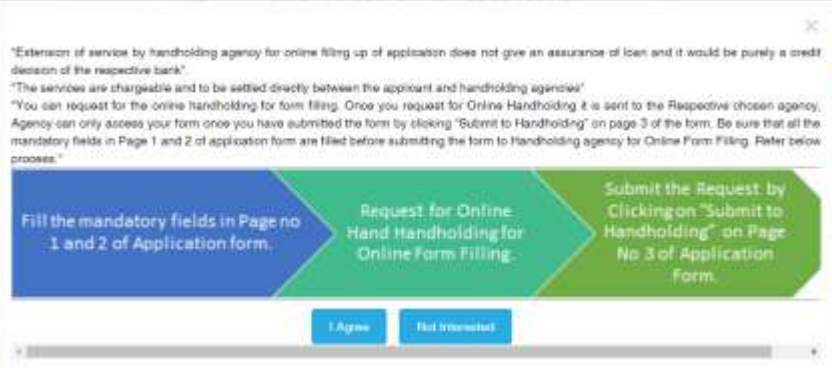
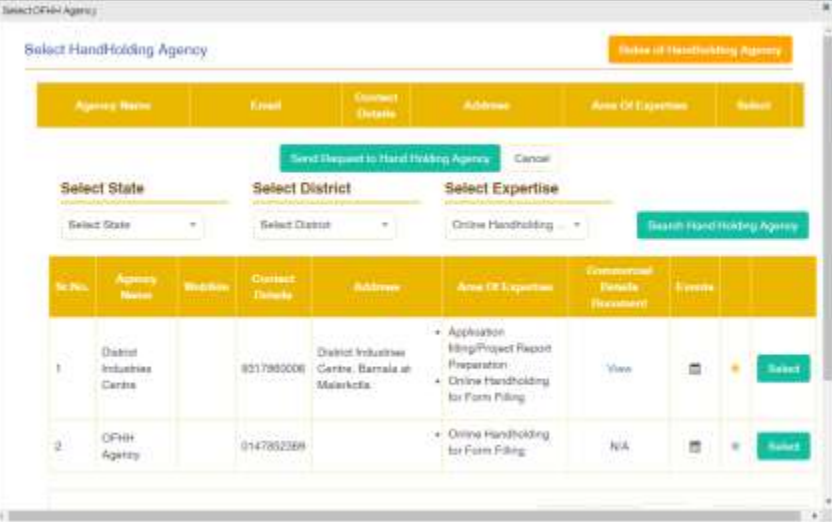
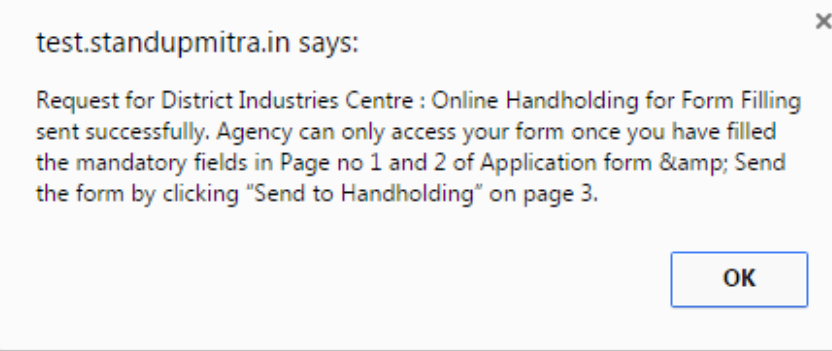
Once the request for Handholding is sent to the chosen HHA, the HHA can access the application only after applicant submits the application form by clicking "Submit to Handholding" on page 3 of the application form. Applicant has to make sure that all mandatory fields in Step 1 and 2 (business information and background of promoters / directors) are filled in before submission to handholding.

Applicant receives the filled in application form back from the HHA.



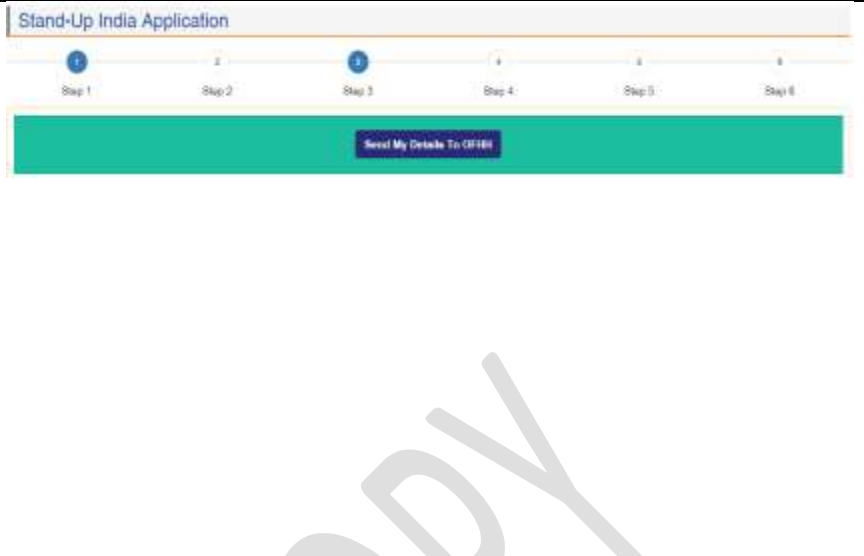
The applicant can use the messaging feature on the portal / e-mail (besides phone, meeting etc.) to communicate with the HHA for charges, communicate details about their business plans, expectations etc. Documents (if any) required to be shared with the HHA, to enable them to fill up the application on behalf of the applicant, can be uploaded as part of the application form or as other documents or can be exchanged through e-mail. Similarly the HHA can use the messaging services to communicate about any clarification with the applicant.

The important screens etc. to ease your access of the HAVE feature are provided below:	
Applicants can click on the " <b>Know More</b> " in Step 3 to go for Online Handholding	<p>Stand-Up India Application</p> <p>Step 1 Step 2 Step 3 Step 4 Step 5 Step 6</p> <p>Online Handholding services can help you to fill the Application Form <a href="#">Know More</a></p>

<p>Form Filling feature on the portal</p>	
<p>Applicant would need to click on <b>"I Agree"</b> to proceed for selection of the agency</p>	
<ol style="list-style-type: none"> <li>1. See any commercial document to ascertain charges / profile of the OHFF agency (if published by the agency) by clicking on <b>"View"</b>.</li> <li>2. Choose the OHFF agency by clicking of <b>"Select"</b></li> <li>3. Click on <b>"Send Request to Handholding Agency"</b> after selecting the agency</li> </ol>	
<p>The following message is displayed. Click <b>"OK"</b>.</p>	


Once you ensure that details in Step 1 and 2 are filled in, you can fill-in as much information as you can, upload documents (wherever possible in Step 5) and click on **“Send My Details to OHFF”**

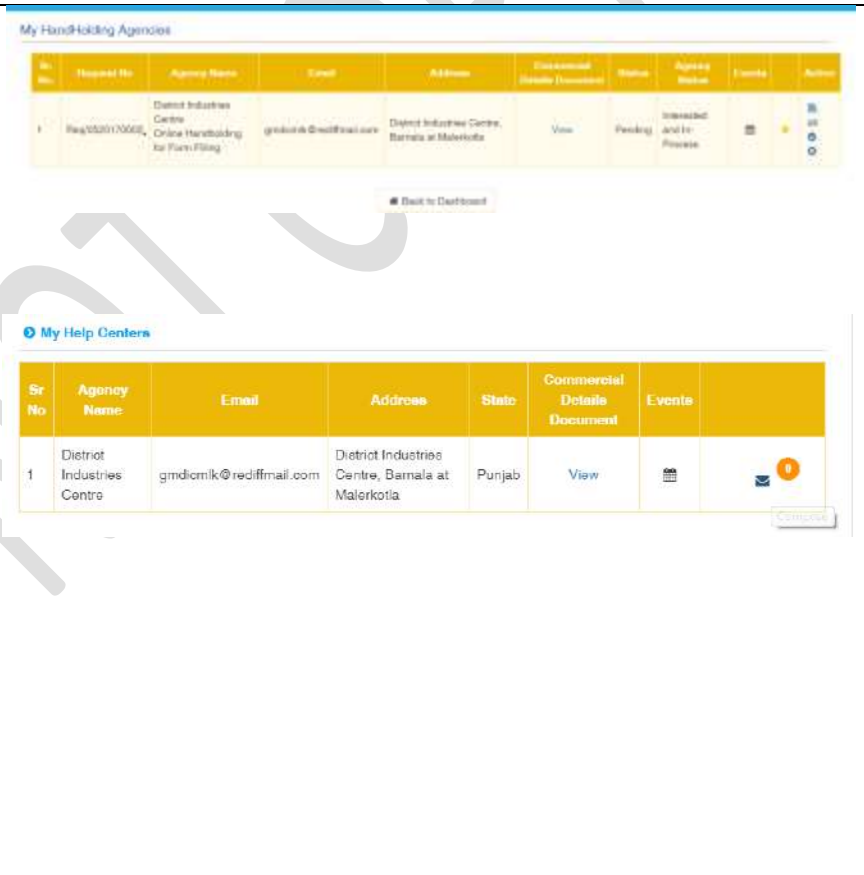
Till OHFF starts filling the form, you can still edit the form.



- After OHFF has filled in the form and submitted back to you, you can submit the application form on the portal.

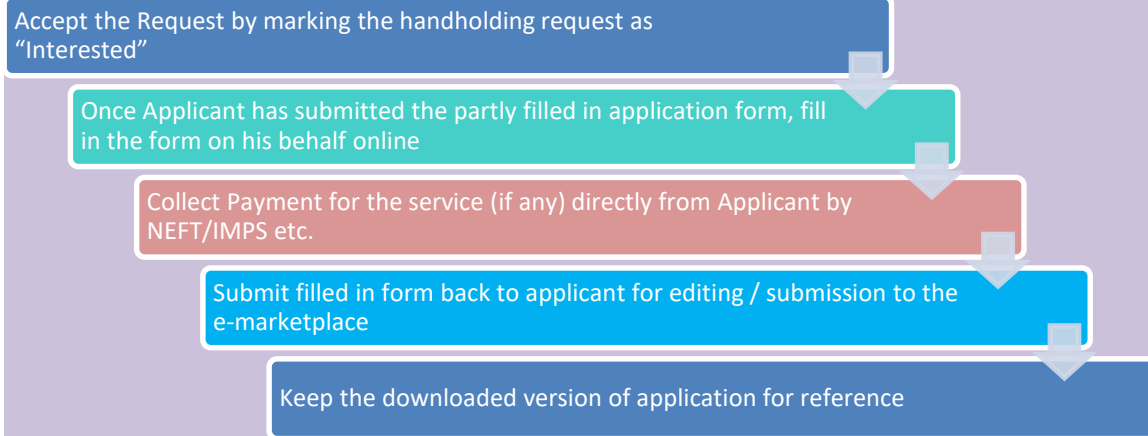
- Applicant needs to mark the OHFF request complete and assign a rating to the service before submitting the form.

- Applicant can communicate with OHFF by clicking on the  icon through messaging feature (at the bottom of his/her dashboard).



### HANDHOLDING (OHFF’s) LEVEL

The detailed process is as follows:



The important screens etc. to ease your access of the OHFF feature are provided below:

The OHFF would get the request as a normal handholding request with area of expertise as "Online Handholding for Form Filling"



1. OHFF needs to mark it as "**Interested**" by clicking on the gear icon. OHFF can view the applicant profile before picking up the case and also contact him/her using the e-mail ID and mobile number.
2. Once applicant submits the form, OHFF can edit the application form by clicking on "**Fill Application Form**".
3. OHFF cannot edit

Sr No.	Request No.	Name of Applicant	Name of Enterprise	Scheme Name	Area of Expertise	Service Requested Date	Completion Date	Applicant Status	HH Agency Status
1	Req0520170002	Amol A	Stand-Up India	Online Handholding for Form Filling	11/05/2017	N/A	Pending	Interested and In Progress By	

Hand Holding Request's List

Hand Holding Request Req0520170002 marked as Interested successfully.

Sr No.	Request No.	Name of Applicant	Name of Enterprise	Scheme Name	Area of Expertise	Service Requested Date	Completion Date	Applicant Status	HH Agency Status
1	Req0520170002	Amol A	Stand-Up India	Online Handholding for Form Filling	11/05/2017	N/A	Pending	Interested and In Progress By	

<p>information on Step 1 and 2. All other information can be edited by OHFF.</p> <p>4. OHFF can Save the form any number of times by clicking on <b>“Save My Details”</b></p> <p>5. Once filled in click on <b>“Submit My Details”</b> to send it back to applicant.</p>	 <p>Please note that Applicant can view the saved details of the application for reviewing it. Applicant cannot edit the details while OHFF is filling up the form on his behalf. Applicant would be able to edit it again once it is submitted back by OHFF.</p>
<p>Use the <b>“Message to applicant”</b> to communicate with applicant through the portal.</p>	

**Note :**

- HHAs providing this ‘online handholding for form filling’ (OHFF) service may charge a reasonable fee from the applicants which has to be settled between the applicant and the agency directly.
- The extension of this service by HHA for online filling of the loan application does not give an assurance of the availability of loan and it would be purely a credit decision of the respective Bank.

Any suggestions to improve the Portal(s) are welcome.

Please write to us at [support@udyamimitra.in](mailto:support@udyamimitra.in)

Encourage aspirant entrepreneurs to board : [www.udyamimitra.in](http://www.udyamimitra.in),  
[www.standupmitra.in](http://www.standupmitra.in)

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