

Protean eGov Technologies Limited



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STANDARD OPERATING PROCEDURE (SOP)

**Change in Subscriber's Name / DOB by Nodal Office
Version 1.3**

REVISION HISTORY

Sr. No.	Date of Revision	Ver	Section Number	Description of Change
1	05-Sept-2024	1.0	-	Initial Version
2	12-Dec-2024	1.1	-	Processing of Name change request for second time
3	14-Jan-2025	1.2	-	Processing of DOB change request wherein subscriber age cross 60 as per new DOB
4	03-Apr-2025	1.3	-	Authorization of subsequent (2 nd time) Name change request at CRA end

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Introduction:

Subscriber Name and Date of Birth (DOB) are the critical data for the NPS Lite subscriber which are registered in CRA system. Therefore, any modification in these fields should be done with due diligence.

An interim process was followed earlier wherein the Subscriber Name and DoB modification involved the submission of documents to CRA by the Aggregator for processing the request in CRA system.

As per the new functionality developed, the subscriber Name and DOB modification can be processed through the NPS-Lite Aggregator office.

This new functionality allows the office to **Initiate and Authorize request** for modification in Name and DOB of the subscriber details in CRA.

The Matrix for above-mentioned updation is as follows:

Flow Matrix for first time Name / DOB Change Request	
Request Initiation by	Authorization
NPS Lite-Accounts Office (NL-AO)	NPS Lite-Accounts Office (NL-AO)
NPS Lite-Accounts Office (NL-AO)	NPS Lite-Oversight Office (NL-OO)
NPS Lite-Oversight Office (NL-OO)	NPS Lite-Oversight Office (NL-OO)

Flow Matrix for Subsequent (2nd time) Name Change Request	
First Level (Request Initiation/ Authorization)	Second Level (Authorization at maker and check level)
NLAO	Protean CRA
NLOO	Protean CRA

Flow Matrix for DOB Change Request wherein subscriber age cross 60 as per new DOB	
Request Initiation by	Authorization
Protean CRA	Protean CRA

Documents required for Subscriber Name Change:

*(Supporting document type:- *.jpeg, *.jpg, *.png, or *.pdf format and size of each document should be between 2 KB to 5 MB.)*

Type of Request	Name change	Marriage	Correction and Other
Documents to be uploaded	Self-attested gazette copy	Self-attested gazette copy/Marriage certificate	Self-attested POI
	Self-attested POI (Proof of Identity) in old and new name	Self-attested POI in new name	S2 Form
	Proof of bank account with new name	Proof of bank account with new name	
	S2 Form	S2 Form	

Documents required for Subscriber Date of Birth: (any one from the list)

(Supporting document type:- .pdf,.jpg,.jpeg between size 2 KB to 5 MB.)

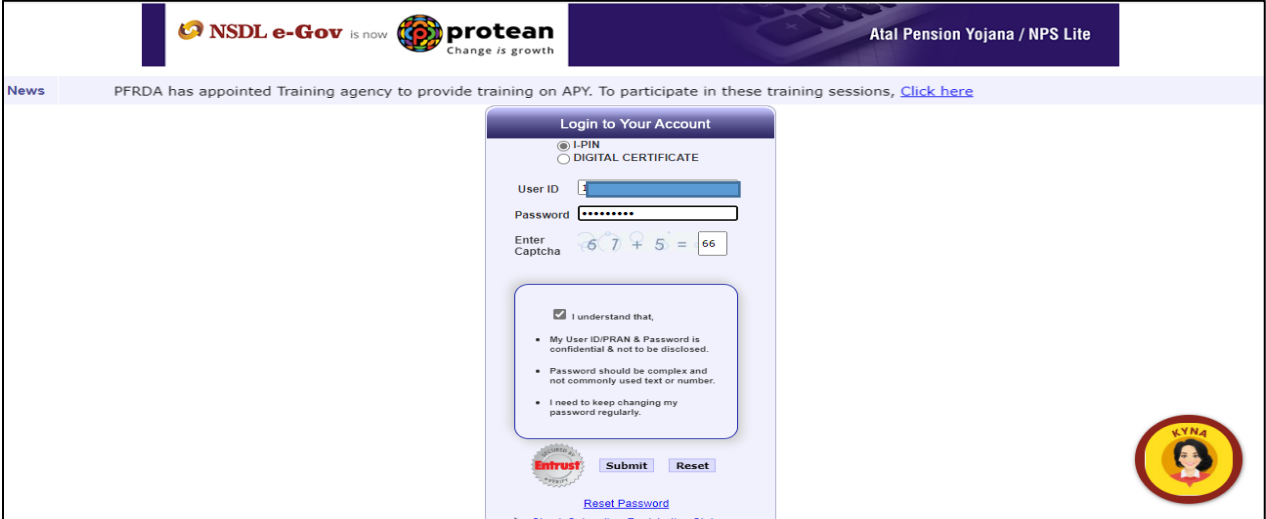
- Passport
- Driving License
- PAN card
- Voter ID card
- AADHAAR
- High School Mark sheet

The office should verify the all documents as submitted by the subscriber. It is the responsibility of office to ensure veracity of documents submitted by the subscriber. The details mentioned in modification form should match with the provided documents.

Both, Subscriber's name and Date of Birth cannot be modified at the same time for any subscriber.

A. Name Change Request initiation by NLAO/NLOO

- NLAO/NLOO office will log in to NPS Lite portal <https://apy.nps-proteantech.in/CRAlite/>. Enter User ID , password, captcha along with AADHAR and OTP *(Please refer Figure 1 in three steps)*



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Atal Pension Yojana / NPS Lite

News PFRDA has appointed Training agency to provide training on APY. To participate in these training sessions, [Click here](#)

Login to Your Account

☒ I-PIN
☐ DIGITAL CERTIFICATE


User ID

Password

Enter Captcha

☒ I understand that,

- My User ID/PIN & Password is confidential & not to be disclosed.
- Password should be complex and not commonly used text or number.
- I need to keep changing my password regularly.



[Reset Password](#)

[Check Subscriber Registration Status](#)


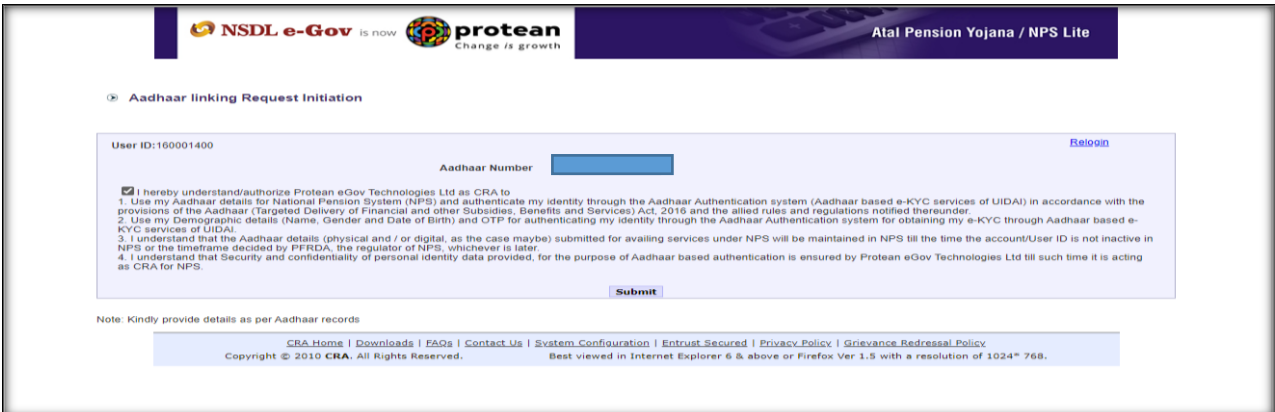


Figure 1.1



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Atal Pension Yojana / NPS Lite

Aadhaar Linking Request Initiation

User ID: 160001400 [Relogin](#)

Aadhaar Number

☒ I hereby understand/authorize Protean eGov Technologies Ltd as CRA to

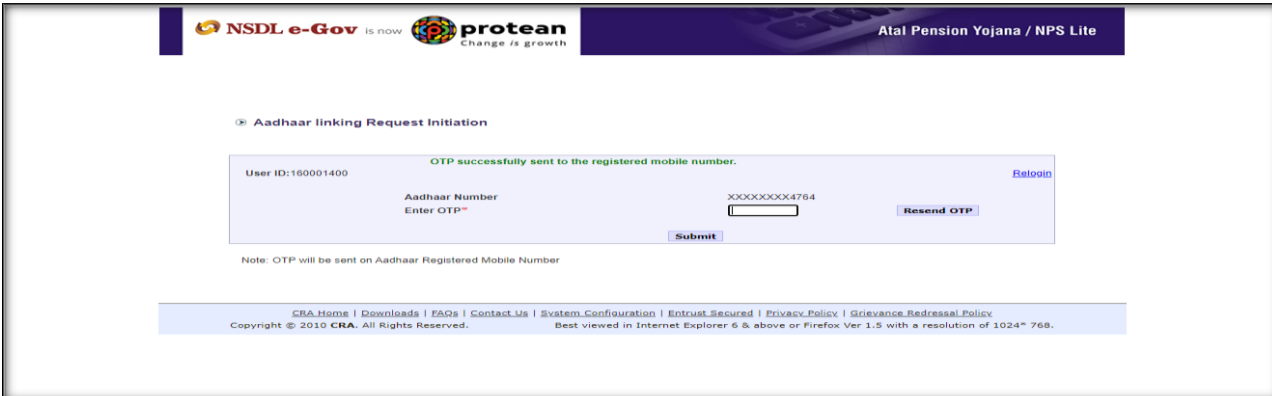
1. Use my Aadhaar details for National Pension System (NPS) and authenticate my identity through the Aadhaar Authentication system (Aadhaar based e-KYC services of UIDAI) in accordance with the provisions of the Aadhaar (Targeted Delivery of Financial and other Subsidies, Benefits and Services) Act, 2016 and the allied rules and regulations notified thereunder.
2. Use my Demographic details (Name, Gender and Date of Birth) and OTP for authenticating my identity through the Aadhaar Authentication system for obtaining my e-KYC through Aadhaar based e-KYC services of UIDAI.
3. I understand that the Aadhaar details (physical and / or digital, as the case maybe) submitted for availing services under NPS will be maintained in NPS till the time the account/User ID is not inactive in NPS or the timeframe decided by PFRDA, the regulator of NPS, whichever is later.
4. I understand that Security and confidentiality of personal identity data provided, for the purpose of Aadhaar based authentication is ensured by Protean eGov Technologies Ltd till such time it is acting as CRA for NPS.

Note: Kindly provide details as per Aadhaar records

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Figure 1.2



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Atal Pension Yojana / NPS Lite

Aadhaar linking Request Initiation

OTP successfully sent to the registered mobile number.

User ID: 160001400

Aadhaar Number

Enter OTP*

XXXXXX4764

Resend OTP

Submit

Note: OTP will be sent on Aadhaar Registered Mobile Number

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Figure 1.3

- Click on option **“Transaction”** and sub menu **“Subscriber Personal Details Update”** (Please refer Figure 2)



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Atal Pension Yojana / NPS Lite

Welcome NPS-Lite Account Office-1500037500

Home | Logout

Contribution Details | Authorize Request | Pay-Out Details | Subscriber Registration | Grievance | Exit Withdrawal Request | Views | Transaction

Update Subscriber Details | Initiate Conditional Withdrawal | Capture NLCC Shift Request | Verify NLCC Shift Request | NLCC Shifting Request Status

View | FATCA File Upload | FATCA File Status | **Subscriber Personal Details Update**

Welcome to Central Record Keeping Agency

[Click here](#) to view list of Exit Claim IDs awaiting any action

"PFRDA has decided that from May 1, 2012, remittances without information on funds transfer will be returned. Further, SCFs pending will be deleted after 15 days. For details, [Click here](#)."

"To view the details of funds returned by the Trustee Bank, please [click here](#)."

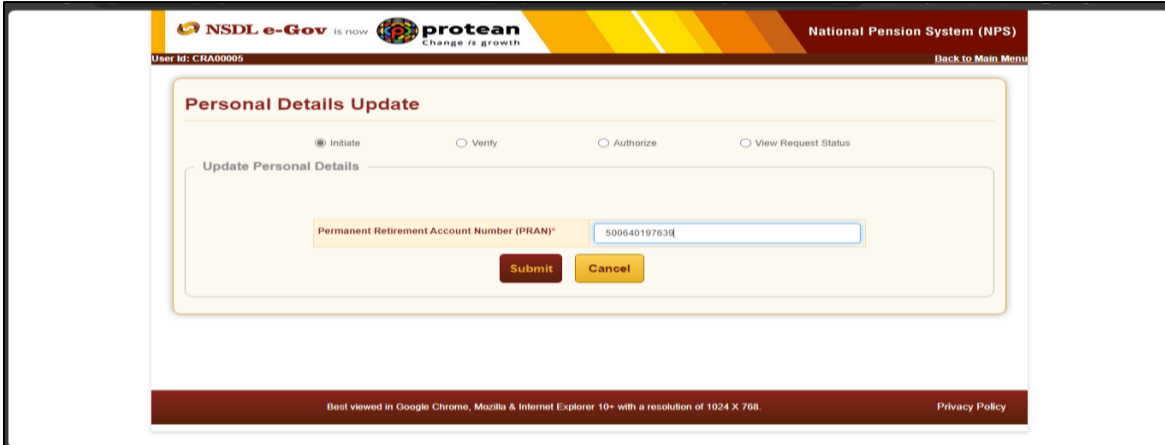
CRA Home | Downloads | FAQs | Contact Us | System Configuration | Entrust Secured | Privacy Policy | Grievance Redressal Policy

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ascripssubmiturl(/SubPersonalDtlsUpdateRedirect;/Sub Personal Details Update)

Figure 2

- Click on option **“Initiate”** and Enter PRAN. Click on **“Submit”** (Please refer Figure 3)



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National Pension System (NPS)

User ID: CRA00005 [Back to Main Menu](#)

Personal Details Update

☒ Initiate
 ☐ Verify
 ☐ Authorize
 ☐ View Request Status

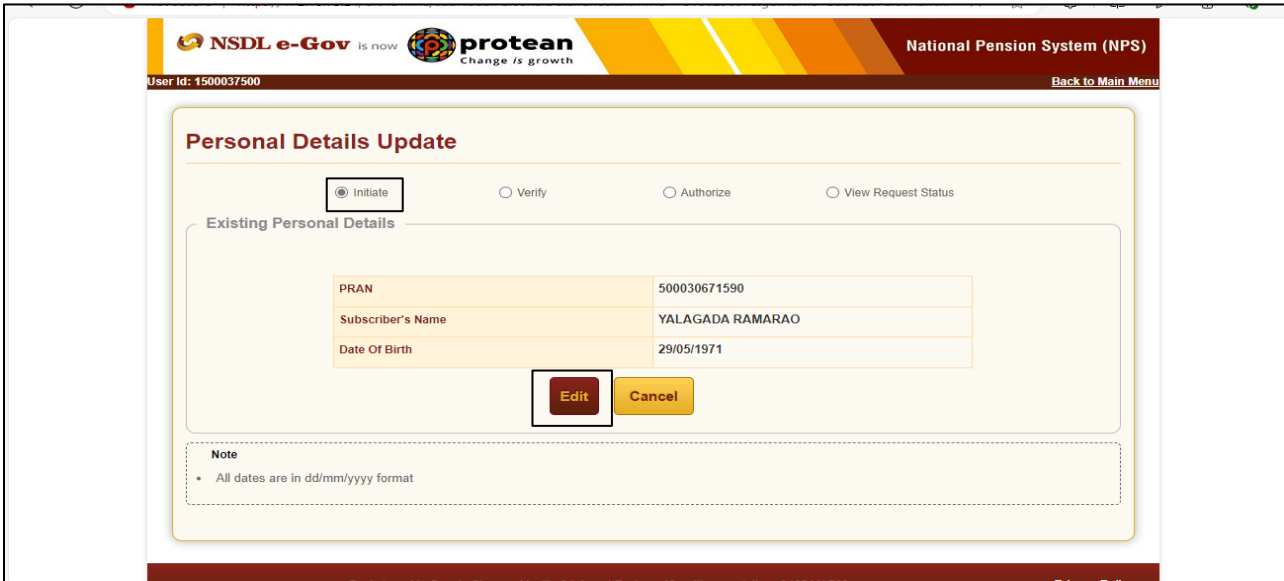
Update Personal Details

Permanent Retirement Account Number (PRAN)*

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Figure 3

- Existing subscriber details available in CRA will be displayed on screen. (Please refer Figure 4). Click on **"Edit"**



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National Pension System (NPS)

User ID: 1500037500 [Back to Main Menu](#)

Personal Details Update

☒ Initiate
 ☐ Verify
 ☐ Authorize
 ☐ View Request Status

Existing Personal Details

PRAN	500030671590
Subscriber's Name	YALAGADA RAMARAO
Date Of Birth	29/05/1971



Note

- All dates are in dd/mm/yyyy format

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Figure 4

- Select the Change Type, **"Subscriber Name"**. Select reason for name change request form available list. (Please refer Figure 5).



National Pension System (NPS)

User Id: CRA00005
 [Back to Main Menu](#)

Personal Details Update

☒ Initiate
 ☐ Verify
 ☐ Authorize
 ☐ View Request Status

New Personal Details

PRAN: 500640197639
 Subscriber Name: SACHIN RAVSAHEB WARADE

Change Type	Existing Value	New Value	Reason for Change	Document Type	Upload Document
<input checked="" type="radio"/> Subscriber's Name	SACHIN RAVSAHEB WARADE	<input type="text" value="SACHIN"/> <input type="text" value="RAVSAHEB"/> <input type="text" value="WARADE"/>	--SELECT--		
<input type="radio"/> Date Of Birth	20/08/1985	<input type="text" value="20/08/1985"/>	--SELECT--	<input type="button" value="Choose File"/> <input type="button" value="No fi...sen"/>	

Note : Document should be in *.jpeg, *.jpg, *.png, or *.pdf format and size of document should be between 2KB to 2MB.

Figure 5

- Upload the all supporting document proof for name change (*Please refer Figure 6*)

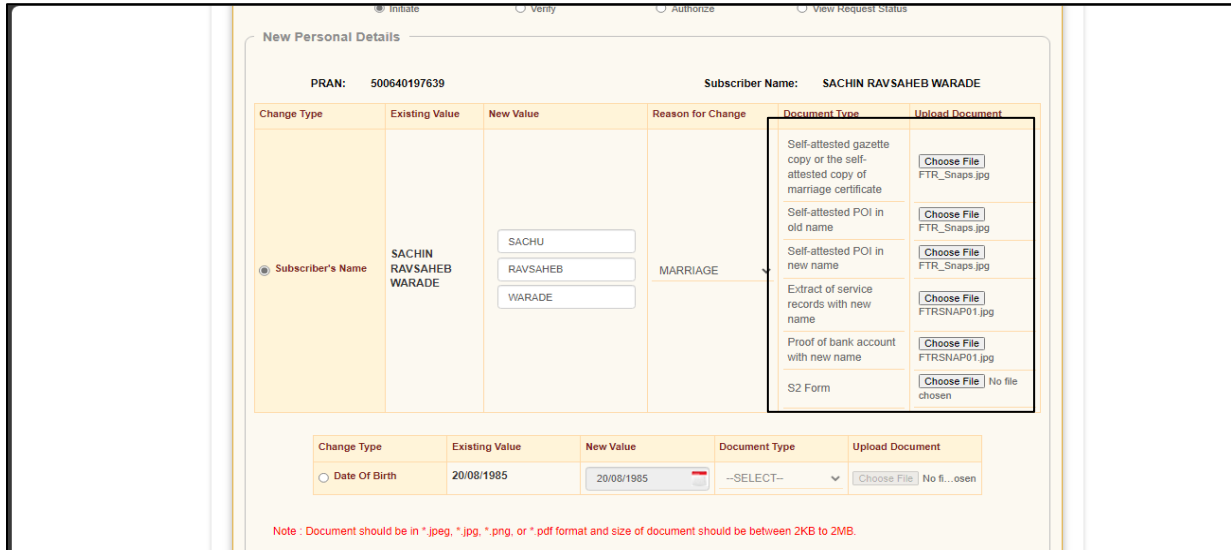


Figure 6

- Click on **"Confirm"** (*Please refer Figure 7*).

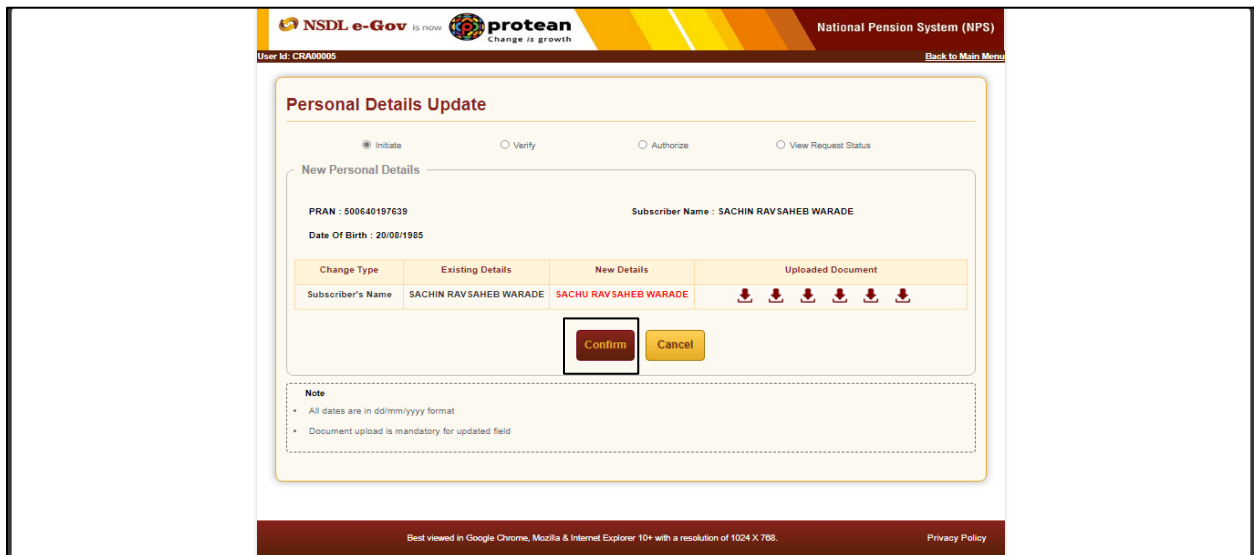


Figure 7

- In case of DOB change, select the Change Type, "Date of Birth" (Please refer Figure 8)

Initiate Verify Authorize View Request Status

New Personal Details

PRAN: 500030671590 Subscriber Name: YALAGADA RAMARAO

Kindly upload valid document

Change Type	Existing Value	New Value	Document Type	Upload Document
Subscriber's Name	YALAGADA RAMARAO	YALAGADA MIDDLE RAMARAO		
Date Of Birth	29/05/1971	08/03/1997	PAN CARD	Choose File New...l.pdf

Note : Document should be in *.jpeg, *.jpg, *.png, or *.pdf format and size of document should be between 2KB to 5MB.

☒ I/ we hereby certify/confirm that Subscriber is a KYC verified customer. The given details and the documents are verified by this office.

Submit Cancel

Figure 8

- Select Document Type from the drop down. (Please refer figure 9).

Initiate Verify Authorize View Request Status

New Personal Details

PRAN: 500000671597 Subscriber Name: VENNELA BALARAMAKRISHNA

Change Type	Existing Value	New Value	Reason for Change	Document Type	Upload Document
Subscriber's Name	VENNELA BALARAMAKRISHNA	VENNELA MIDDLE BALARAMAKRISHNA	--SELECT--		
Date Of Birth	18/03/1974	06/03/1974	--SELECT--	--SELECT--	Choose File No fi...sen

Note : Document should be in *.jpeg, *.jpg, *.png, or *.pdf format and size of document should be between 2KB to 5MB.

☐ I/ we hereby certify/confirm that Subscriber is a KYC verified customer. The given details and the documents are verified by this office.

Submit Cancel

Figure 9

- Select Document and tick on the declaration. *(Please refer figure 10)*

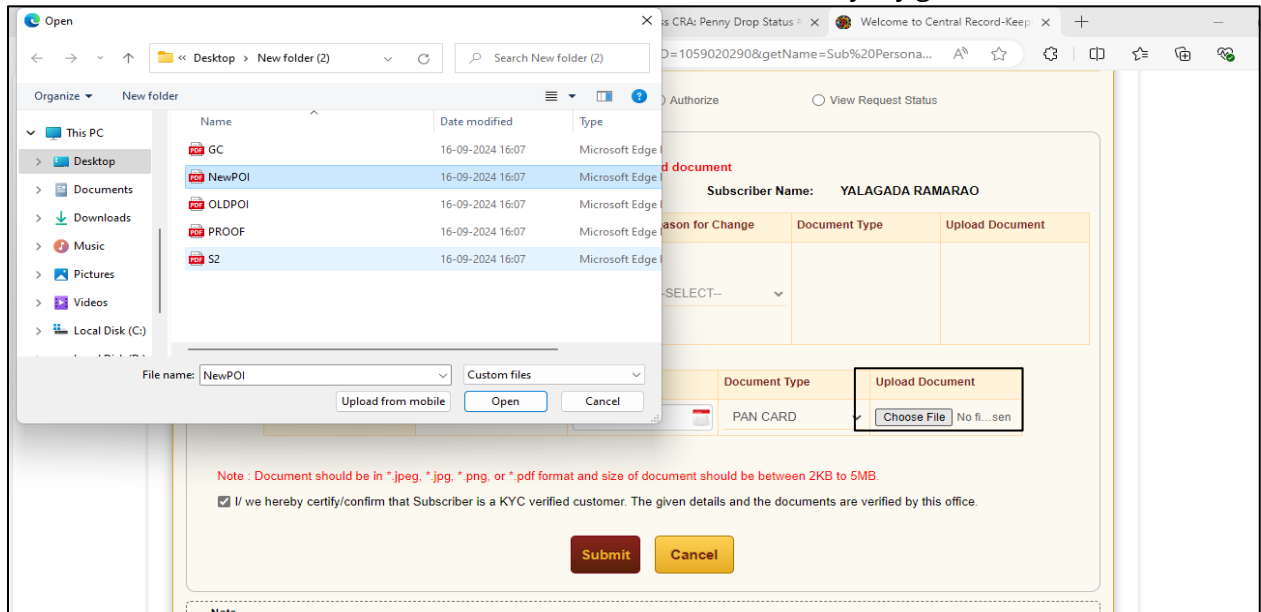


Figure 10

- 'Request has been successfully initiated' message and acknowledge number would be displayed on the screen. *(Please refer Figure 11)*

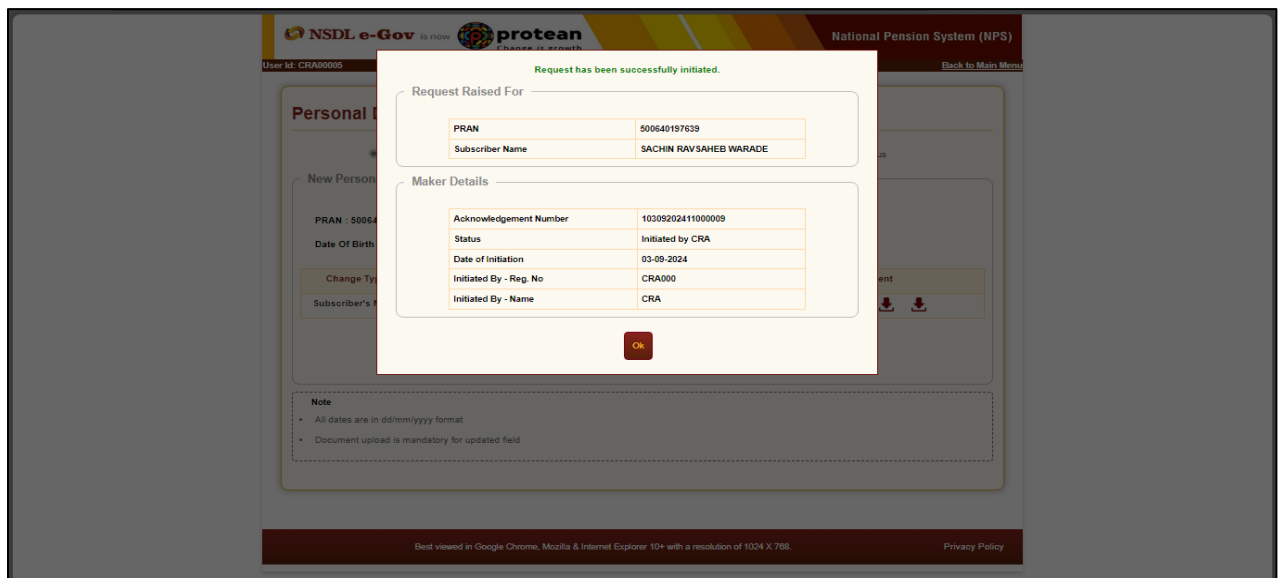


Figure 11

B. Name Change Request authorization by NLAO /NLOO office.

Subscriber name change request Initiated by NLAO / NLOO needs to be authorized by NLAO/ NLOO office.

In case NLAO office has initiated change request, NLAO (Using 2nd user ID or NLOO office will able to authorize the request.

Authorization of request by NLAO /NLOO:

- NLAO / NLOO nodal office will log in to CRA portal <https://apy.nps-proteantech.in/CRAlite/>. Enter User ID , password, captcha along with AADHAR and OTP (Please refer Figure 12 in three steps)

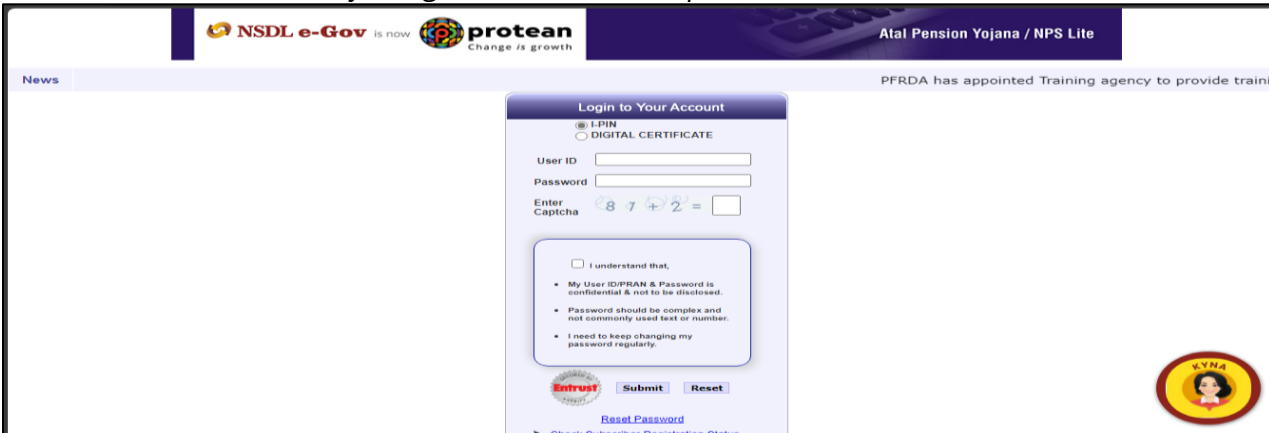


Figure 12.1

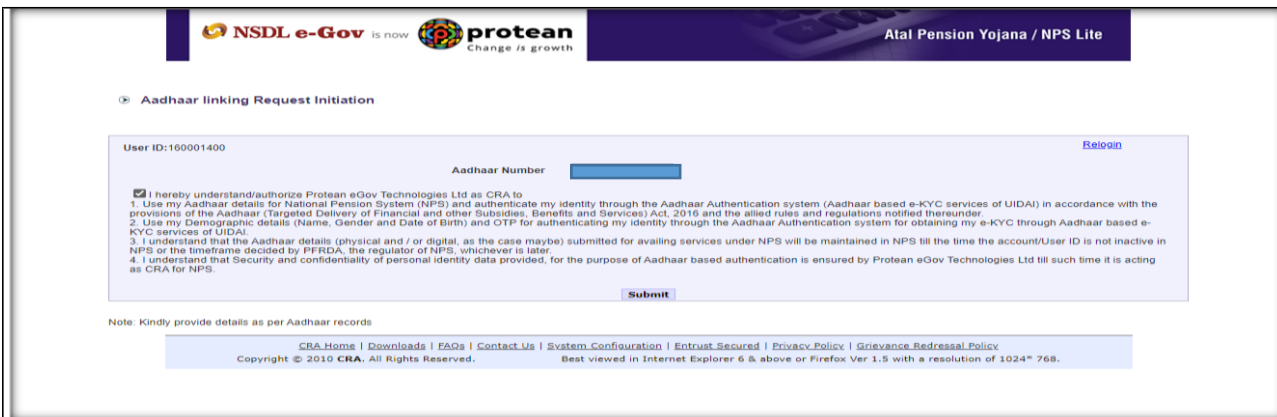


Figure 12.2

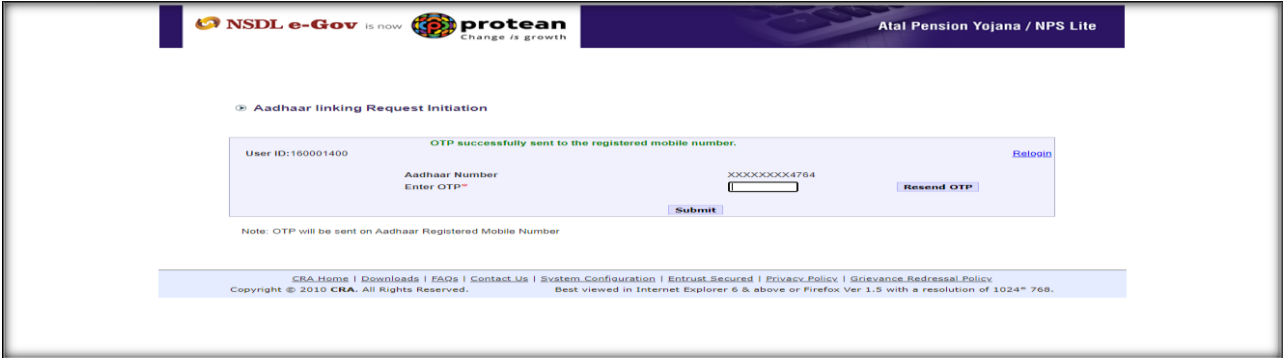


Figure 12.3

- Click on option Transaction--> Subscriber Personal Details Update--> **"Authorize"**. Enter PRAN or acknowledgement ID or From - To Date range. Click on **"Submit."** (Please refer Figure 13)

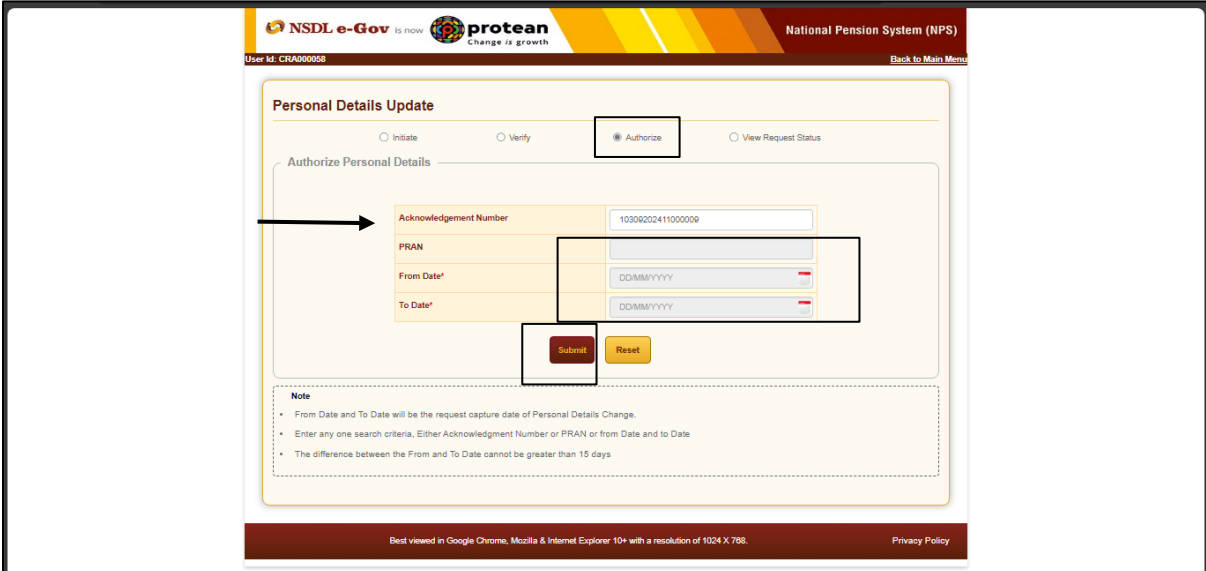
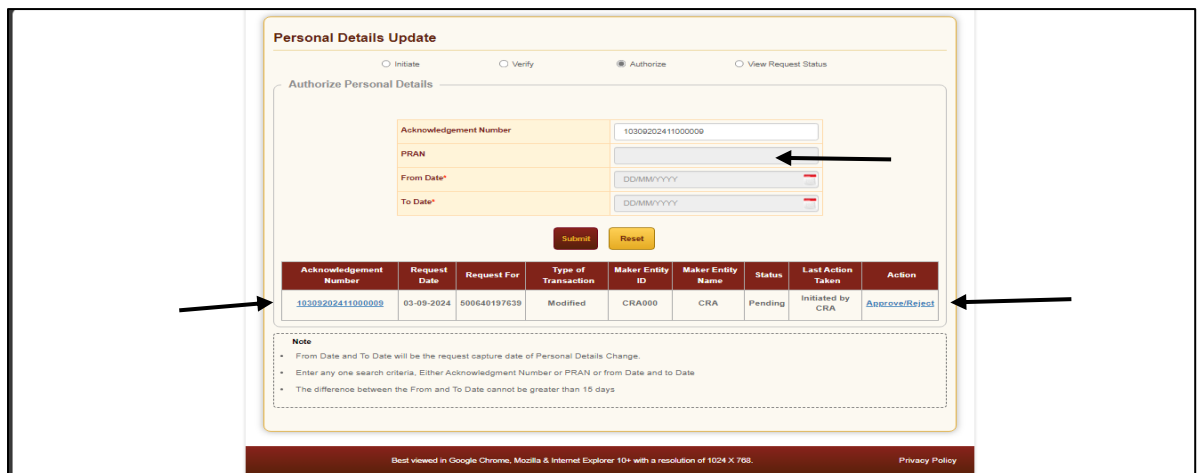


Figure 13

- Details of pending request will be visible on screen. To check and authorize the details entered, click of hyperlink "Acknowledgement number" or "PRAN". (Please refer figure 14)



Personal Details Update

☐ Initiate
 ☐ Verify
 ☒ Authorize
 ☐ View Request Status

Authorize Personal Details

Acknowledgement Number: 10309202411000009
 PRAN: [Field]
 From Date*: DD/MM/YYYY
 To Date*: DD/MM/YYYY

Acknowledgement Number	Request Date	Request For	Type of Transaction	Maker Entity ID	Maker Entity Name	Status	Last Action Taken	Action
10309202411000009	03-09-2024	500640197639	Modified	CRA000	CRA	Pending	Initiated by CRA	Approve/Reject

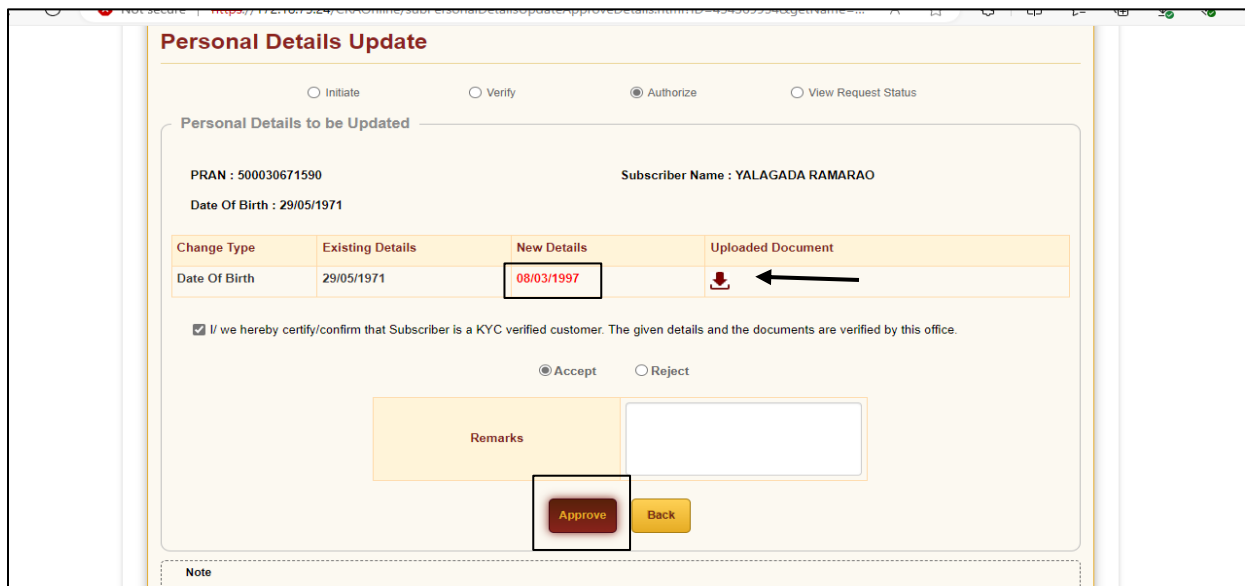
Note

- From Date and To Date will be the request capture date of Personal Details Change.
- Enter any one search criteria. Either Acknowledgement Number or PRAN or from Date and to Date
- The difference between the From and To Date cannot be greater than 15 days

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Figure 14

- NLAO / NLOO will check the uploaded documents available in downloadform and details entered and click on 'Accept' if the details are correct and Reject incase details are incorrect (*Please refer Figure 15*).




Personal Details Update

☐ Initiate
 ☐ Verify
 ☒ Authorize
 ☐ View Request Status

Personal Details to be Updated

PRAN : 500030671590
 Date Of Birth : 29/05/1971
 Subscriber Name : YALAGADA RAMARAO

Change Type	Existing Details	New Details	Uploaded Document
Date Of Birth	29/05/1971	08/03/1997	

☒ I/ we hereby certify/confirm that Subscriber is a KYC verified customer. The given details and the documents are verified by this office.

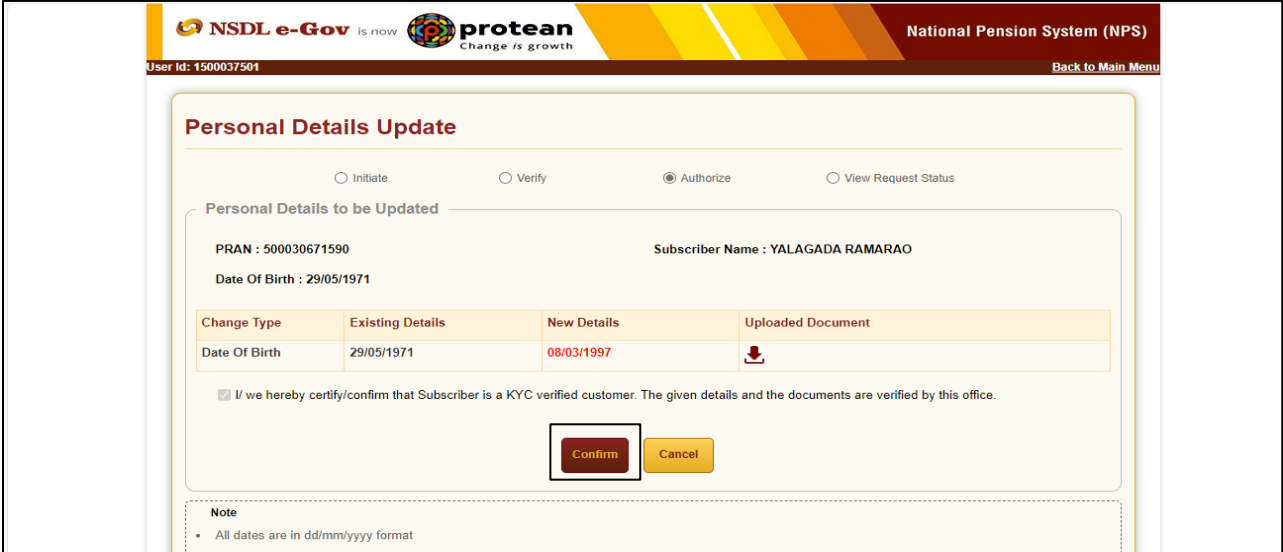
☒ Accept
 ☐ Reject

Remarks: [Field]

Note

Figure 15

- Once NLAO / NLOO clicks on Submit, tick the declaration box and then click on 'Confirm' (Please refer Figure 16).




Personal Details Update

☐ Initiate ☐ Verify ☒ Authorize ☐ View Request Status

Personal Details to be Updated

PRAN : 500030671590 Subscriber Name : YALAGADA RAMARAO

Date Of Birth : 29/05/1971

Change Type	Existing Details	New Details	Uploaded Document
Date Of Birth	29/05/1971	08/03/1997	

☒ I/we hereby certify/confirm that Subscriber is a KYC verified customer. The given details and the documents are verified by this office.


Confirm **Cancel**

Note

- All dates are in dd/mm/yyyy format

Figure 16

- 'Request has been successfully Authorized' message would be displayed. (Please refer Figure 17).



Request has been successfully Authorized.

Requested For

PRAN	500030671590
Subscriber Name	YALAGADA RAMARAO

Details

Acknowledgement Number	11609202411002195
Status	Authorised
Date of Authorization	16-09-2024
Authorized By - Reg. No	8000543
Authorized By - Name	THE VIZIANAGARAM DISTRICT INDIRA KRANTHI PADHAM MUTUAL AIDED CO.DIST.FE.LTD

Ok

Figure 17

C. View Status request

To view status of request, click on "Transaction" → "Subscriber Personal Details Update" → **"View Request Status"** → **Choose from Accepted / Pending / Rejected** and **"Submit"** (Please refer Figure 18).

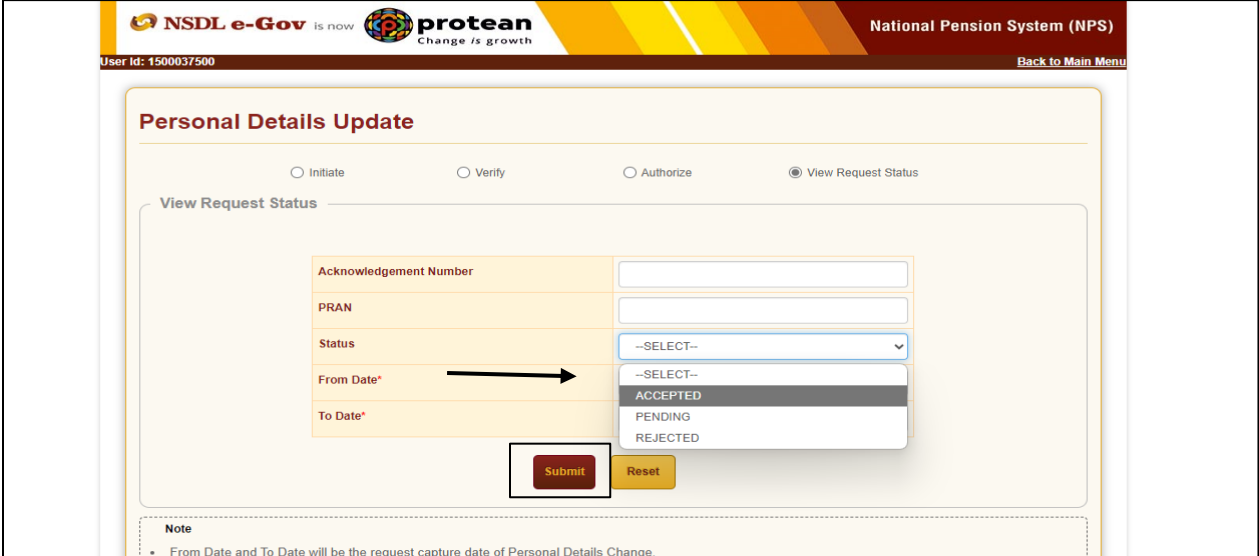
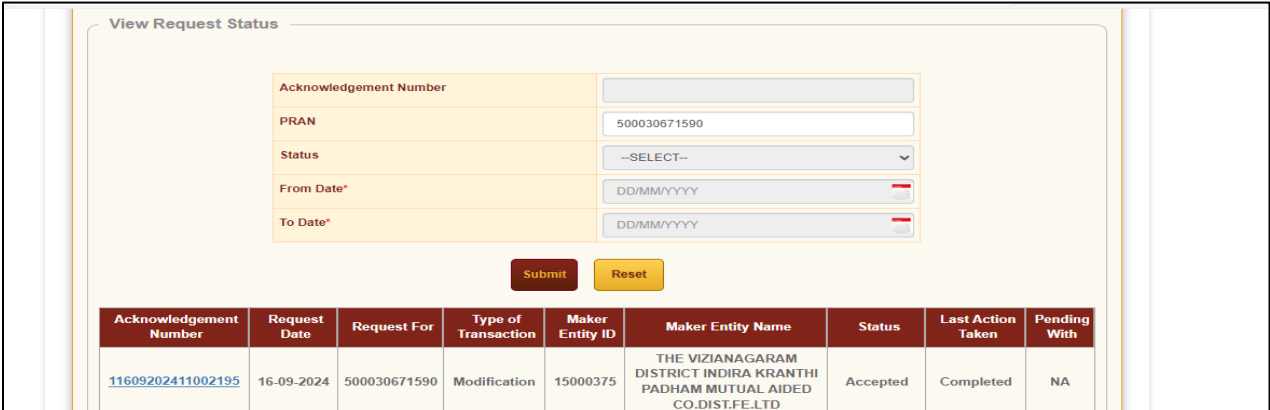


Figure 18

➤ List of Accepted / Pending / Rejected would be displayed (Please refer Figure 19).



Acknowledgement Number	Request Date	Request For	Type of Transaction	Maker Entity ID	Maker Entity Name	Status	Last Action Taken	Pending With
11609202411002195	16-09-2024	500030671590	Modification	15000375	THE VIZIANAGARAM DISTRICT INDIRA KRANTHI PADHAM MUTUAL AIDED CO.DIST.FE.LTD	Accepted	Completed	NA

Figure 19

D. Processing of Name change request for second time

In case, NLOO/NLAO receives the Name modification request for the second time for particular PRAN, for such cases, and respective office will not be able to process such request at their end and will have to follow below steps:

- a) Aggregator office has to collect S2 form along with required document (as mentioned in above point “**Documents required for Subscriber Name Change:**” on page no. 5).
- b) On receipt of documents, verification part of document will be done by office
- c) As per the process of initiation and authorization at NLOO/NLAO level mentioned above, office has to process request in CRA system.
- d) Final authorization in CRA system will be done at CRA for which concern NLOO/NLAO has to send an email communication to Protean CRA along with documents.

E. Processing of Date of Birth (DOB) change request wherein subscriber age cross 60 as per new DOB

In case, NLOO/NLAO receives the Date of Birth modification request wherein subscriber age cross 60 as per new DOB, for such cases, respective office will not be able to process such request at their end and will have to follow below steps:

- a) Aggregator office has to collect S2 form along with required document (as mentioned in above point “**Documents required for Subscriber Name Change:**” on page no. 5).
- b) On receipt of documents, verification and authentication part of document will be done by office
- c) Aggregator office has to send such cases to CRA on email along with S2 Form and supporting document (attested by your office). From CRA end, such cases will be processed.
