Protean eGov Technologies Limited

STANDARD OPERATING PROCEDURE (SOP)

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

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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 (2nd 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 NPSLite 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)*

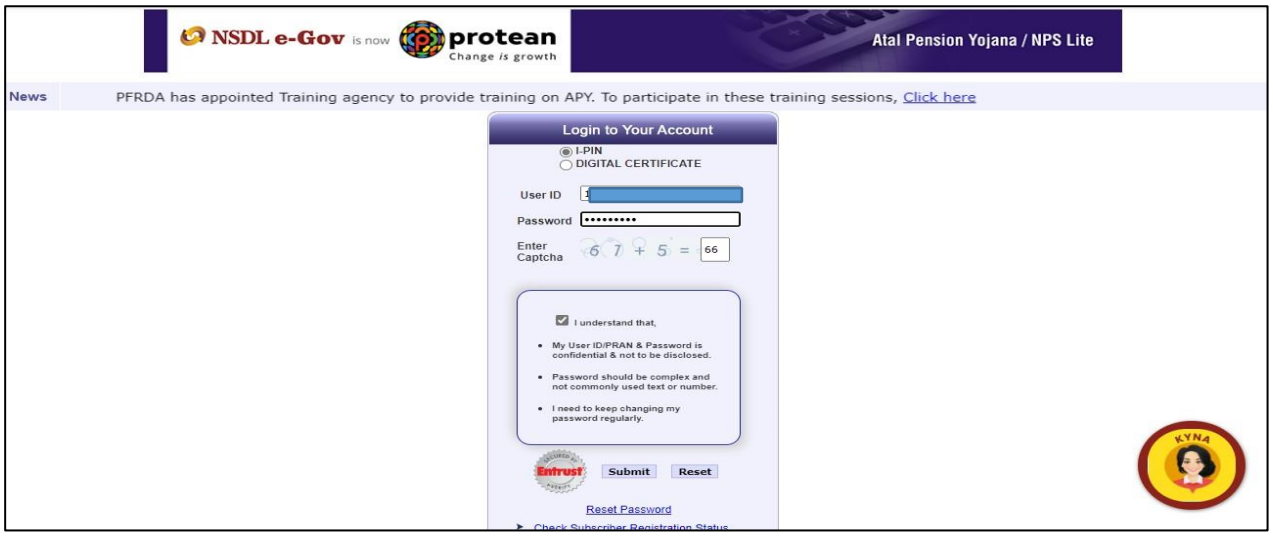

Figure 1.1

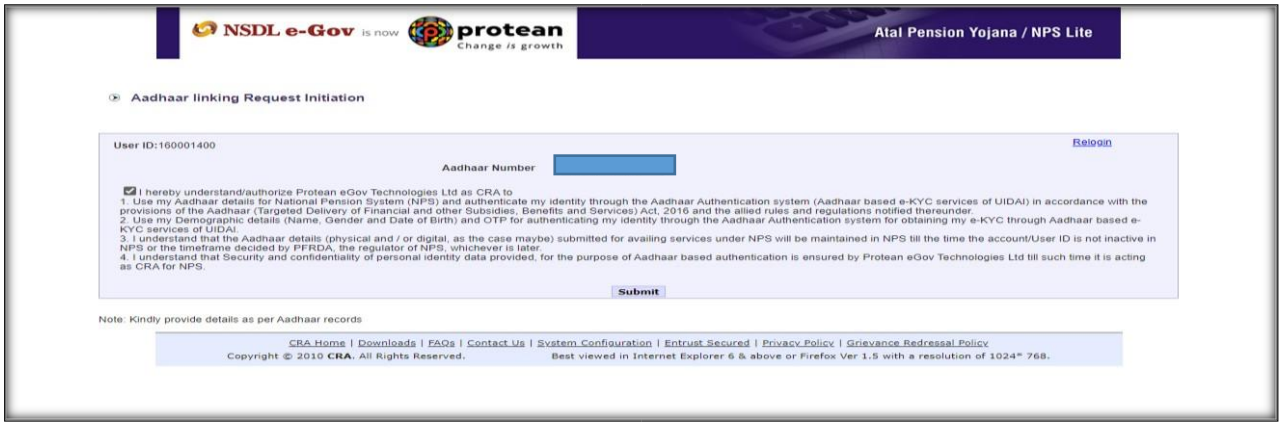

Figure 1.2

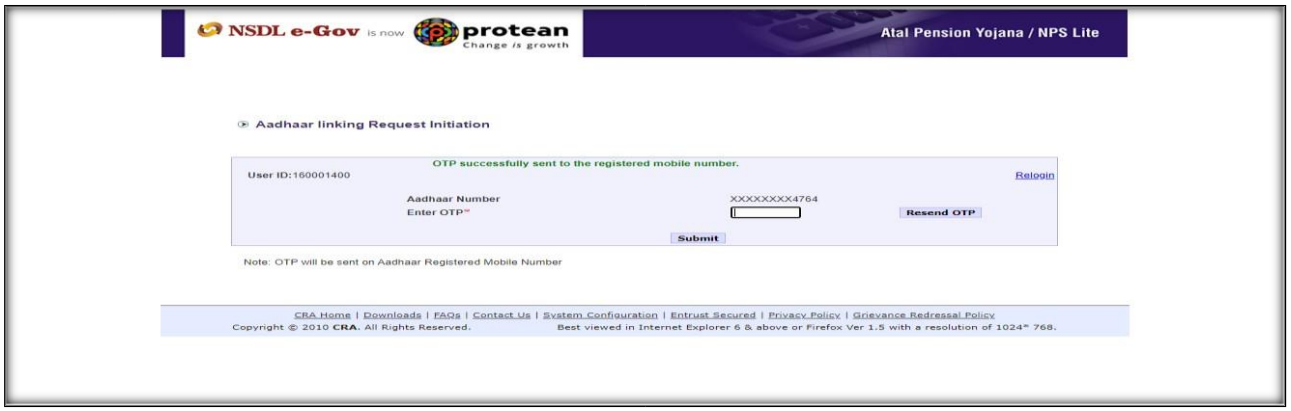

Figure 1.3 ➢ Click on option **"Transaction"** and sub menu **"Subscriber Personal Details Update"** *(Please refer Figure 2)*

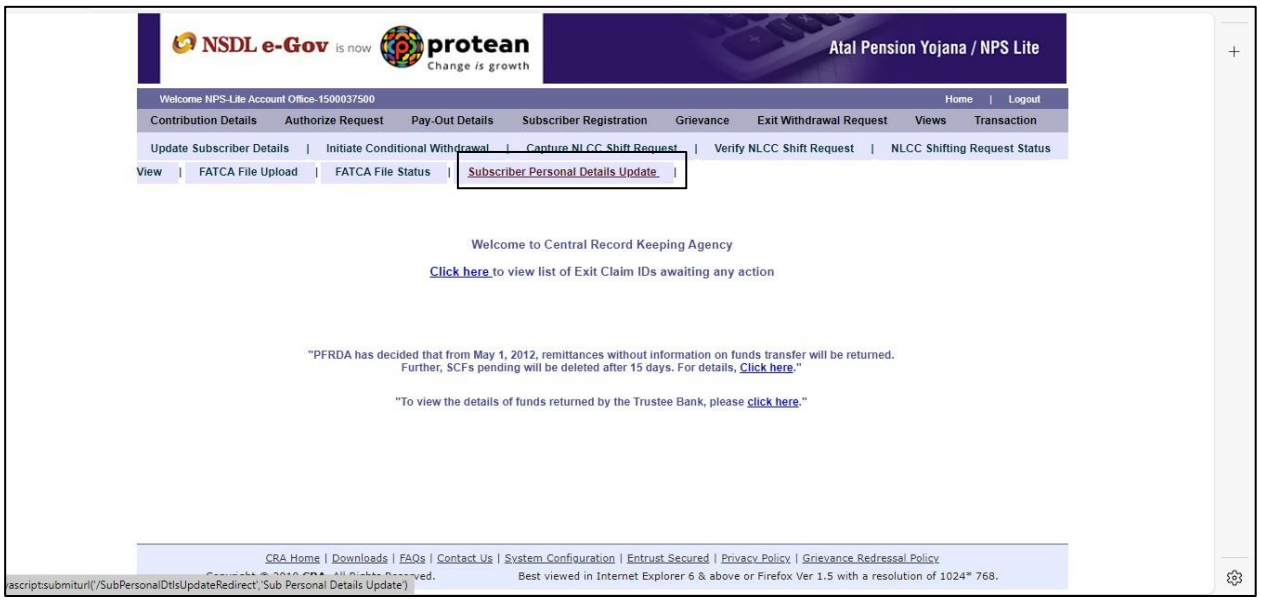

Figure 2 ➢ Click on option **"Initiate"** and Enter PRAN. Click on **"Submit"** *(Please refer Figure 3)*

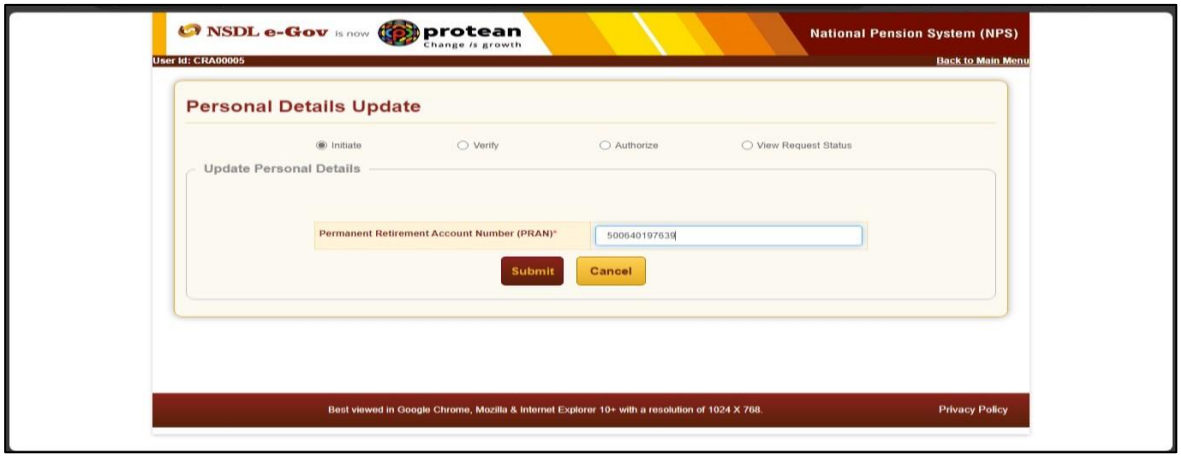

Figure 3

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

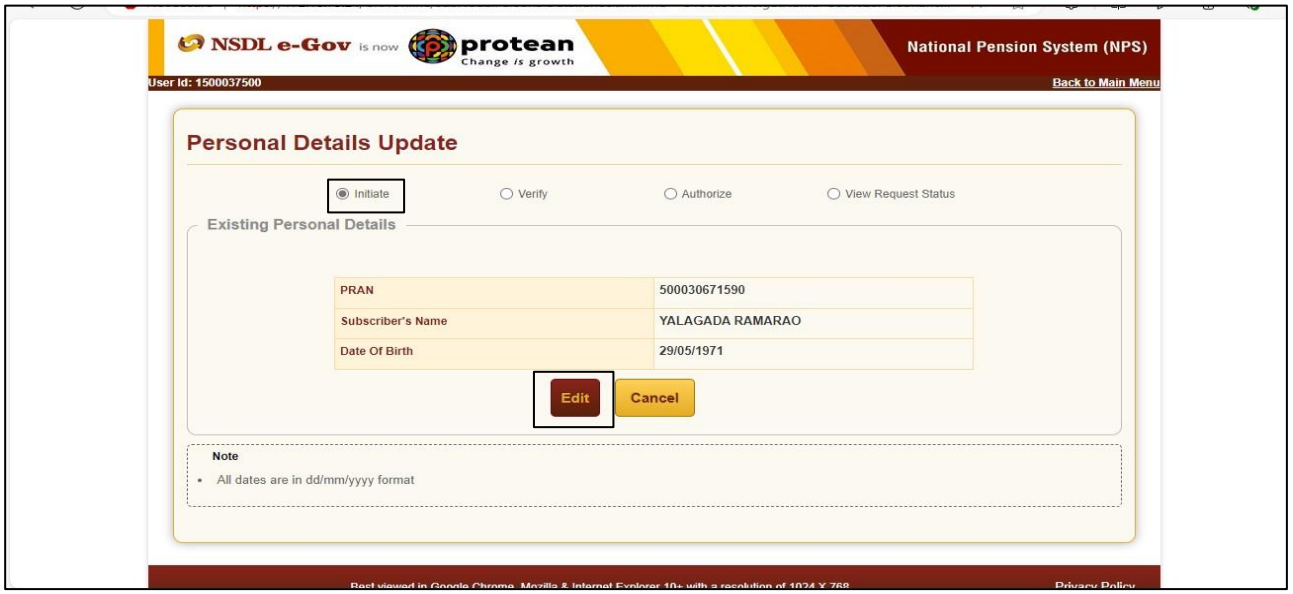

Figure 4

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

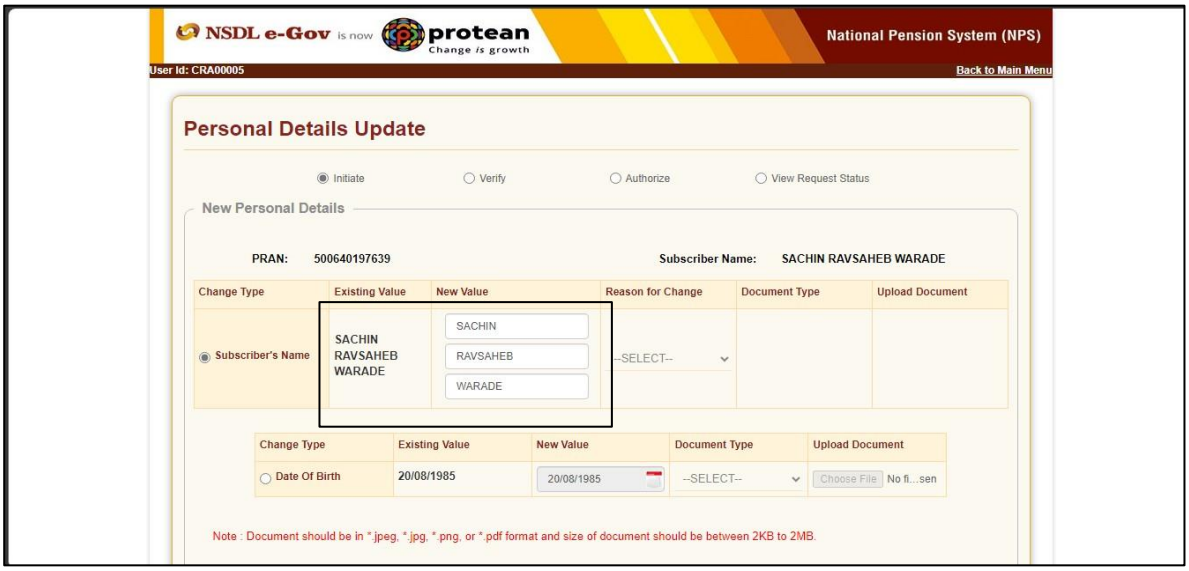

Figure 5

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

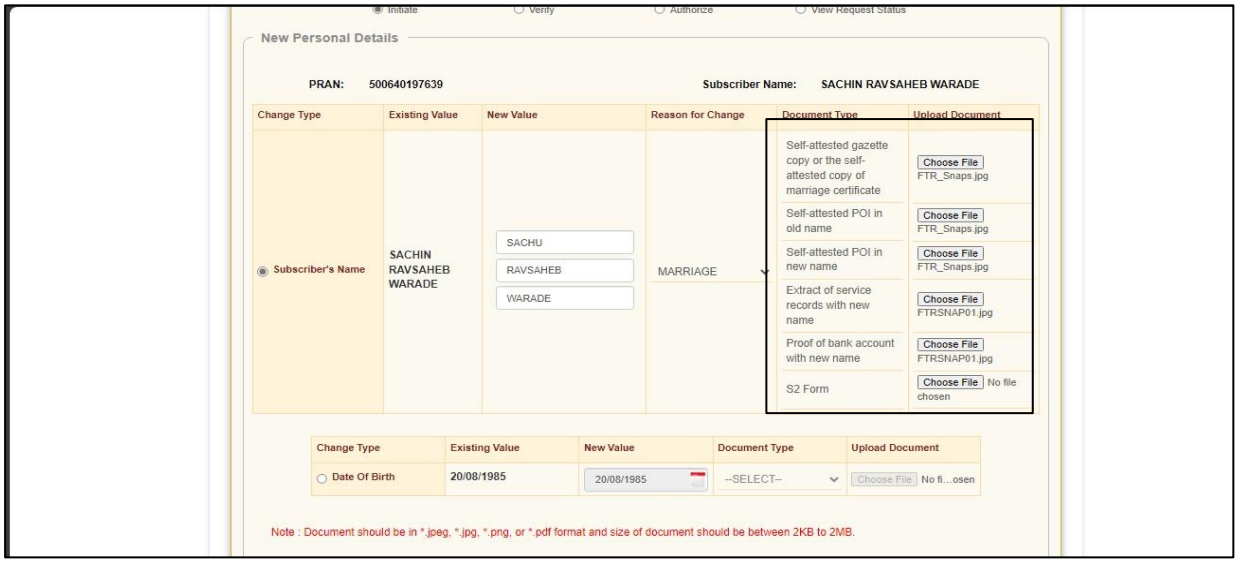

Figure 6

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

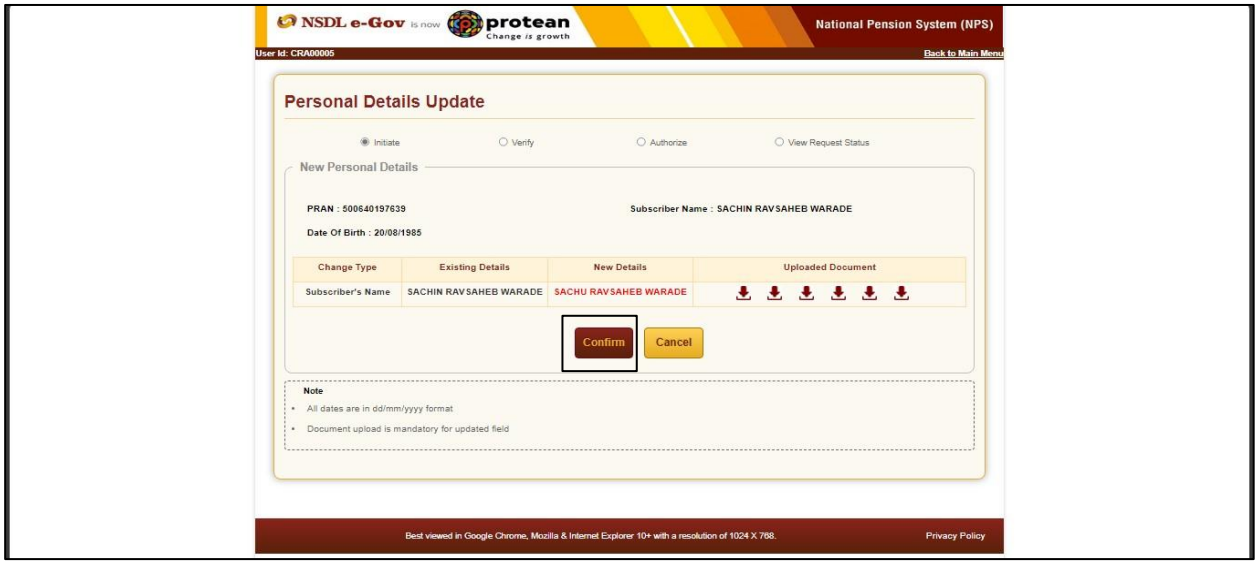

Figure 7

- **Incase of DOB change Select the Change Type, "Date of Birth" Please refer Figure *8)***

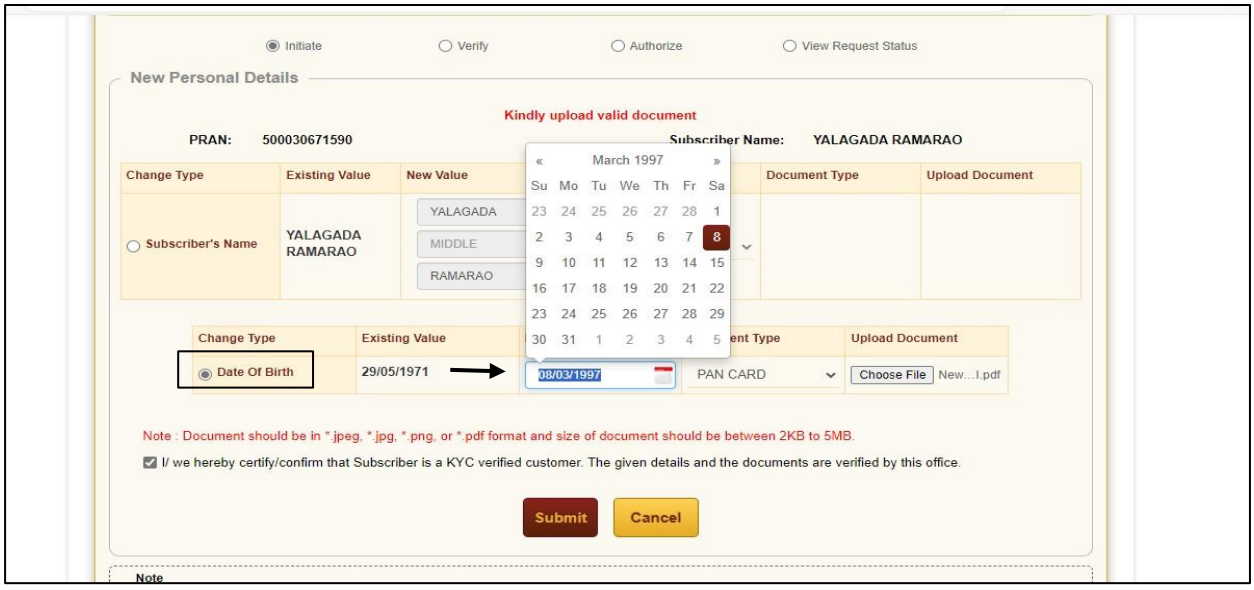

Figure 8

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

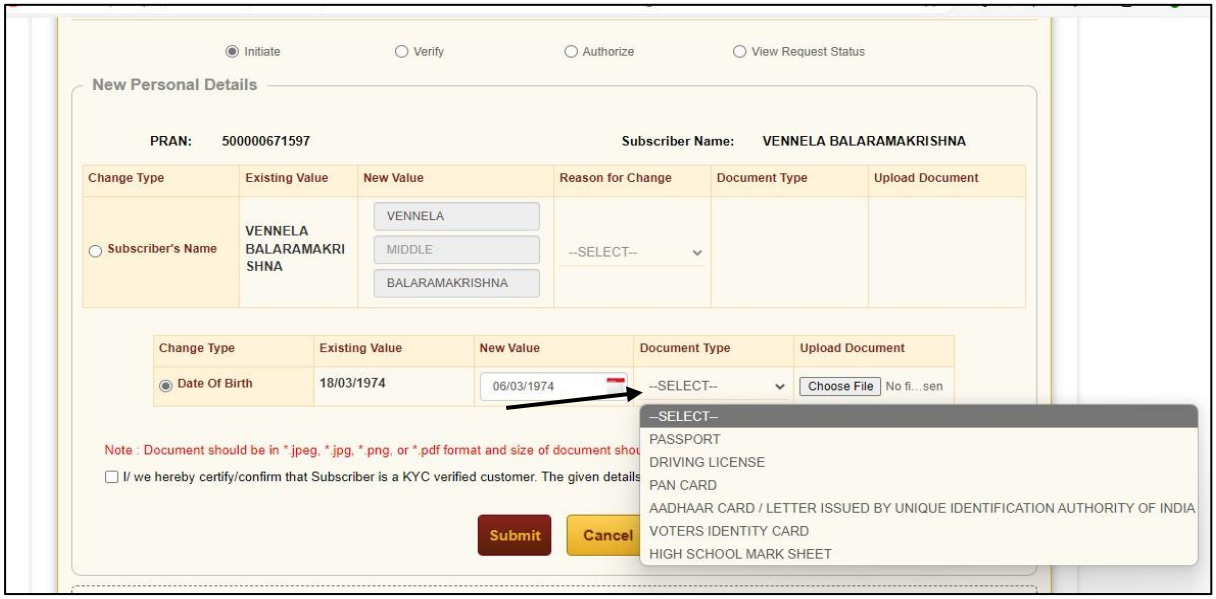

Figure 9

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

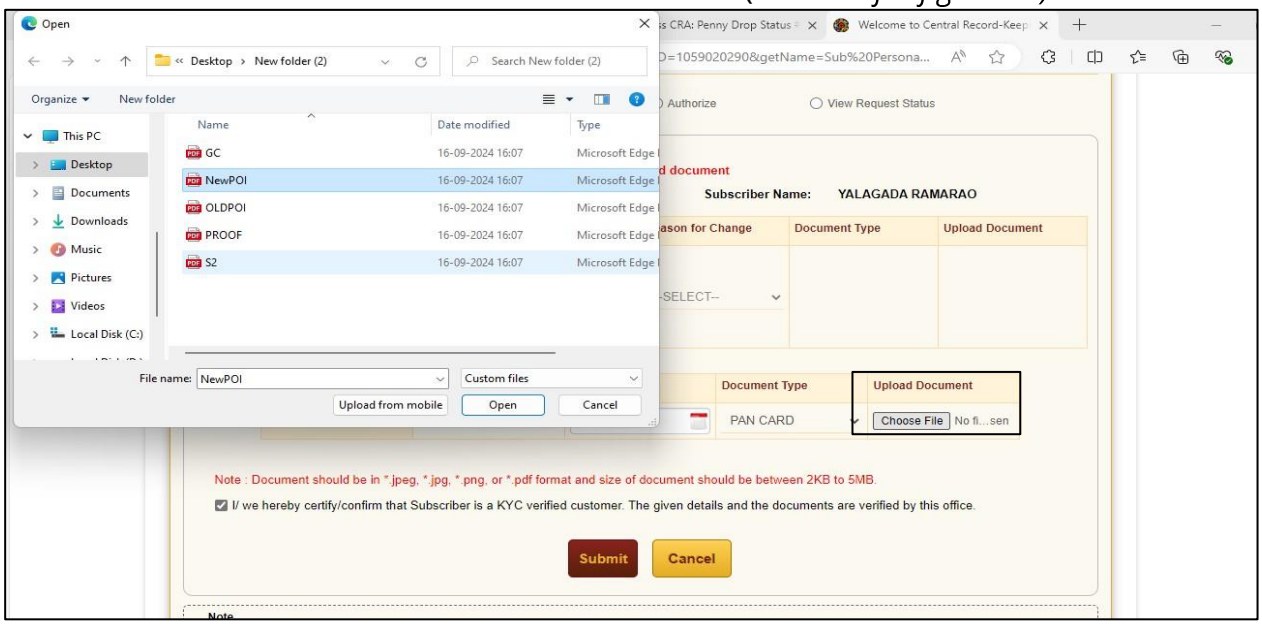

Figure 10

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

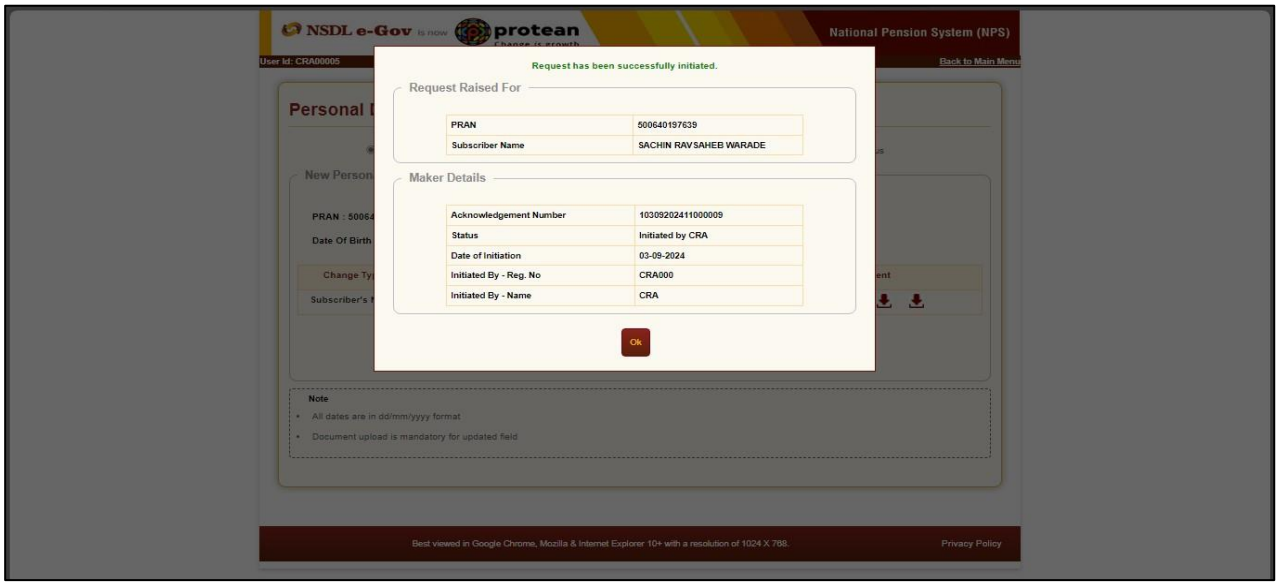

Figure 11

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.npsproteantech.in/CRAlite/. Enter User ID , password, captcha along with AADHAR and OTP *(Please refer Figure 12 in three steps)*

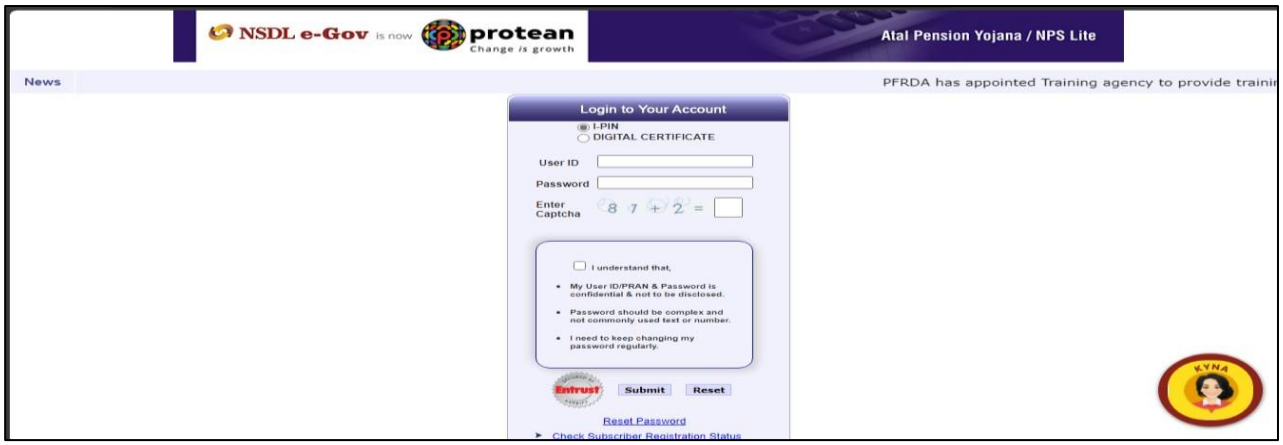

Figure 12.1

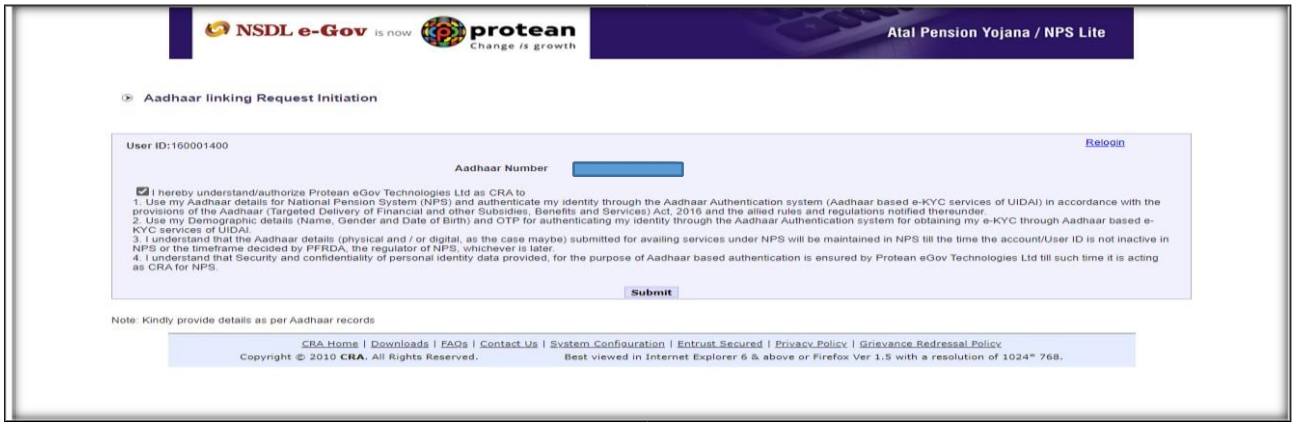

Figure 12.2

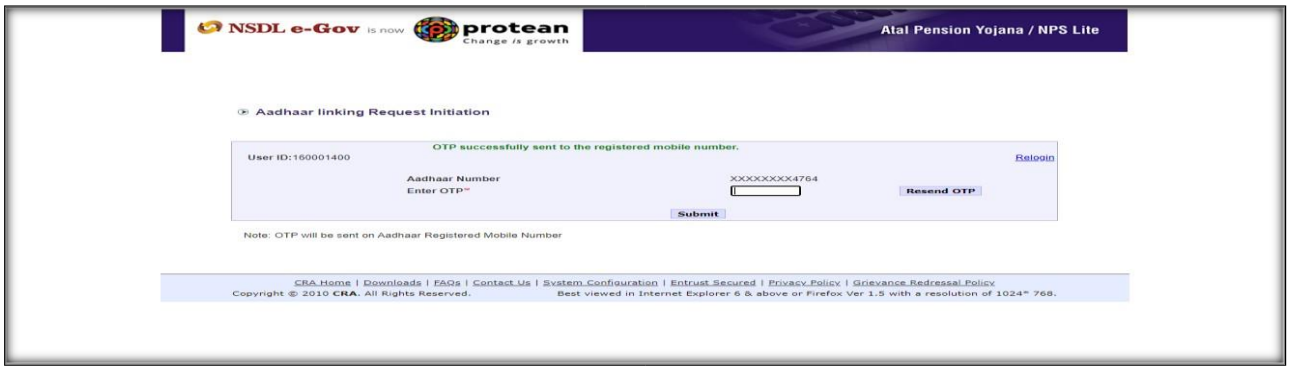

Figure 12.3

- 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)*

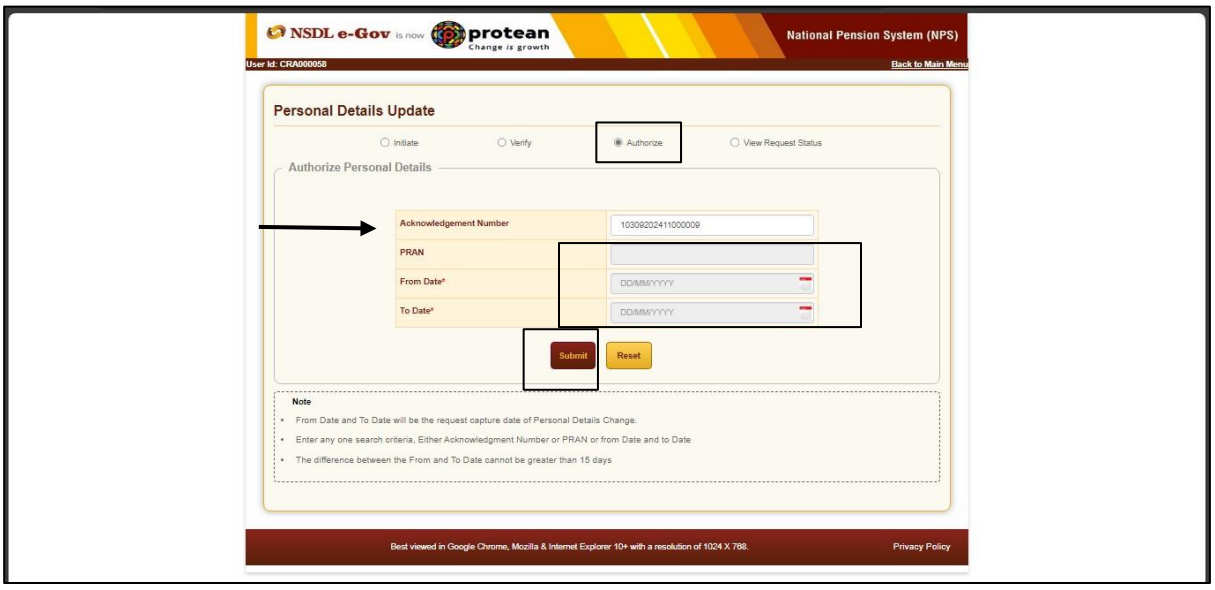

Figure 13

- 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*)

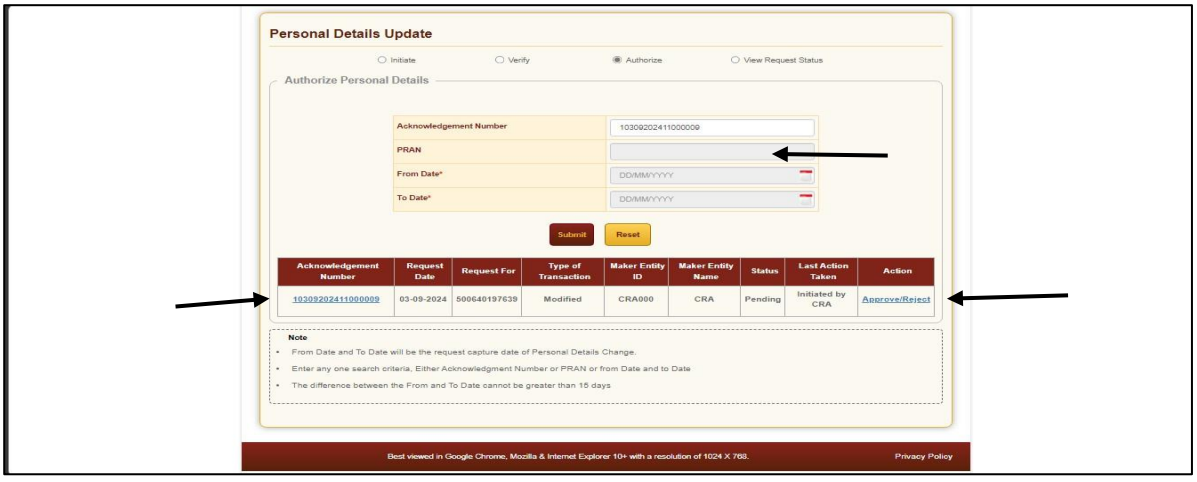

Figure 14

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

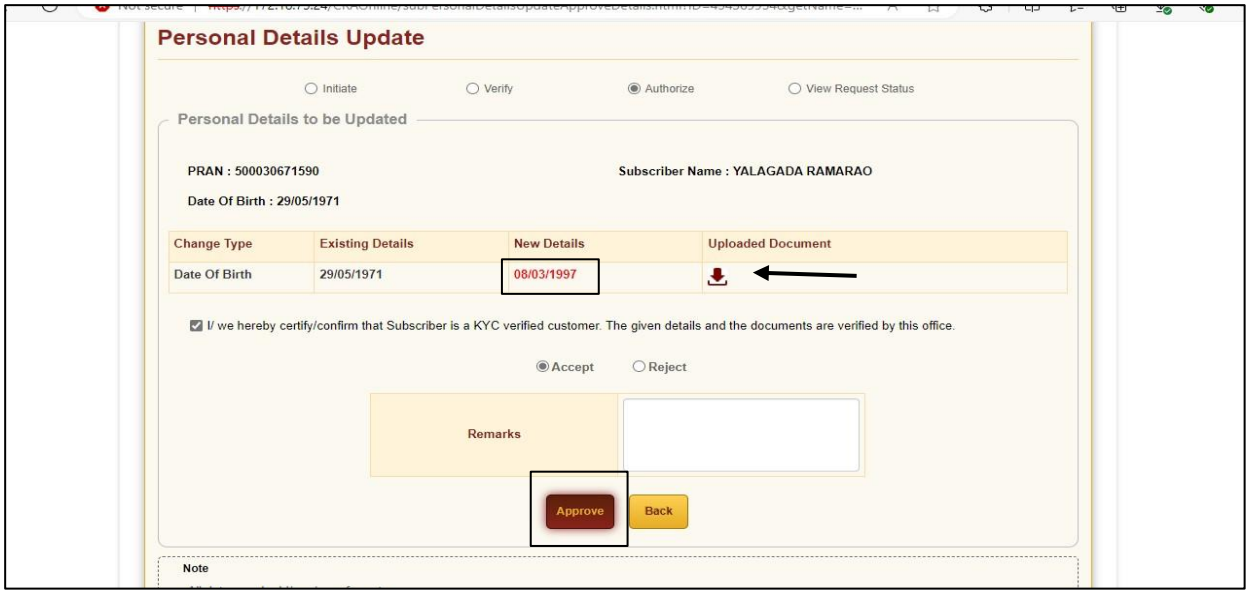

Figure 15

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

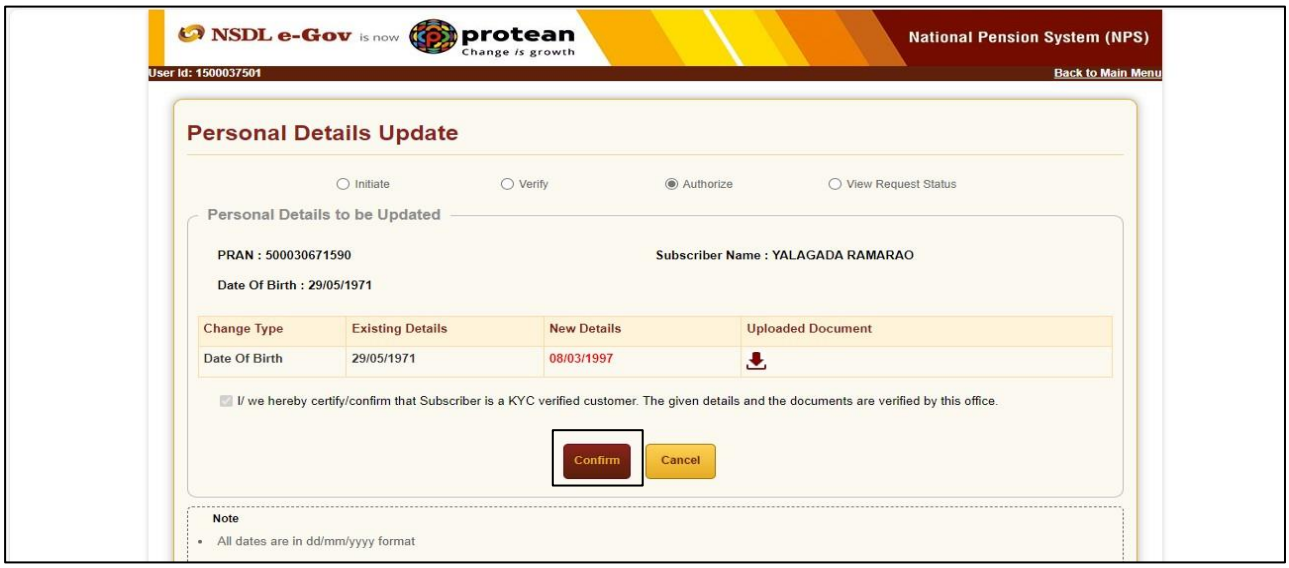

Figure 16

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

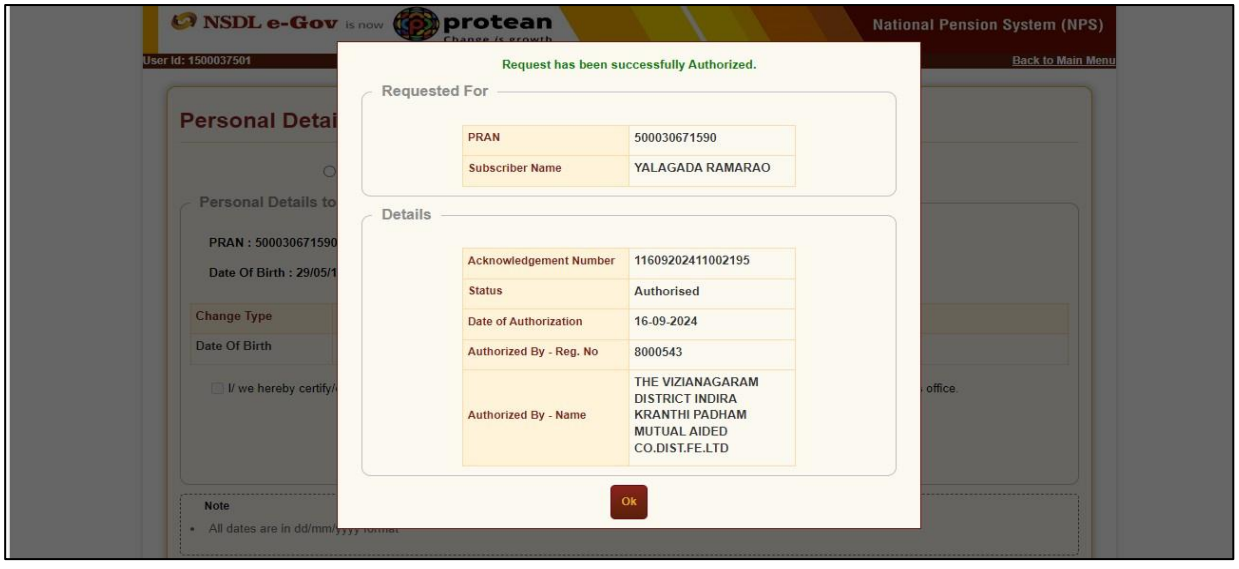

Figure 17

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).*

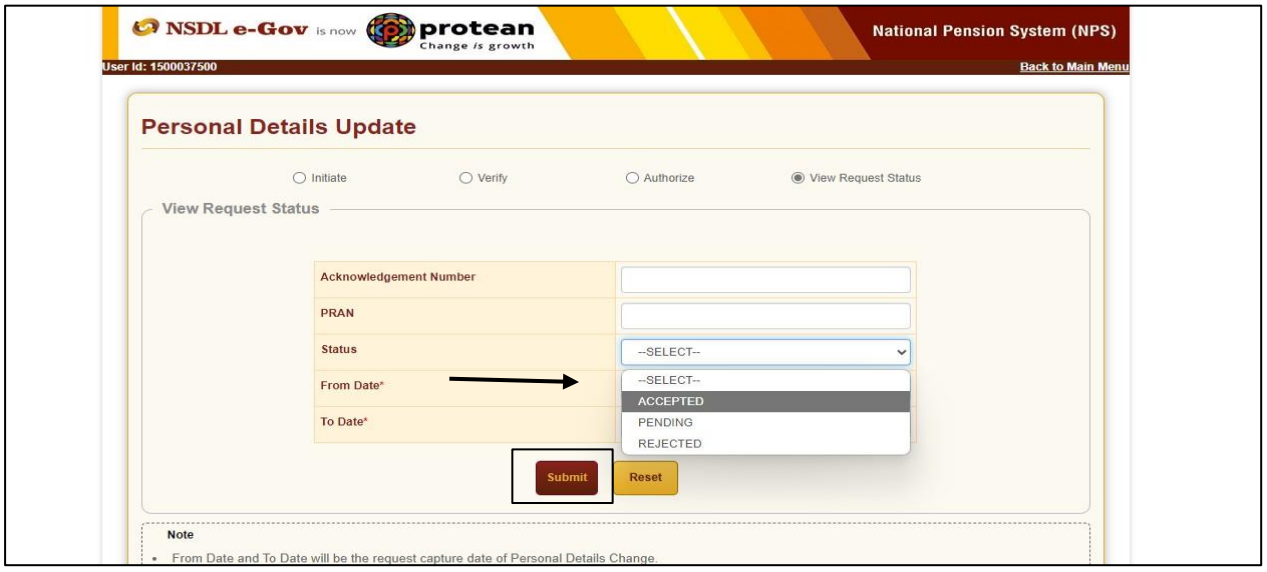

Figure 18

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

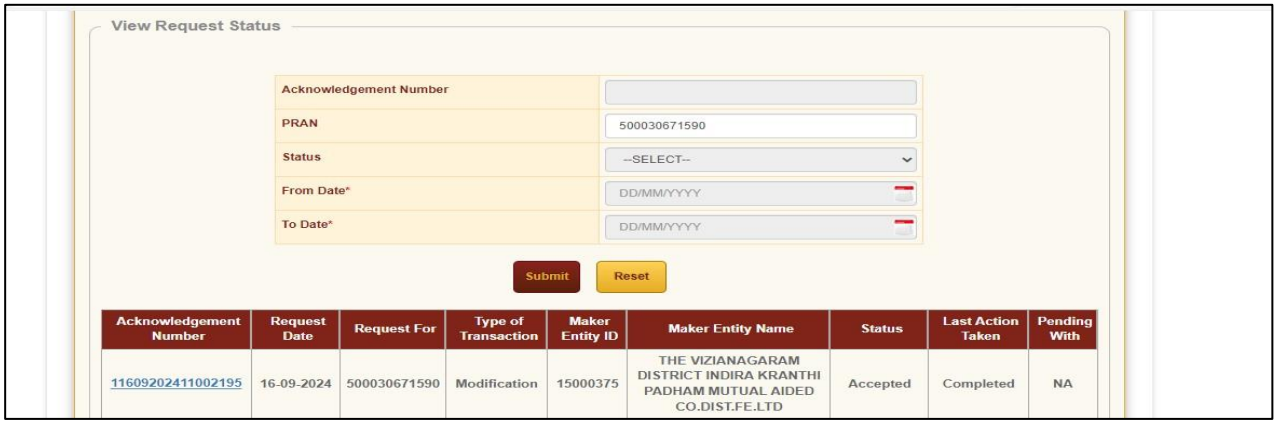

Figure 19

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.

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