Protean eGov Technologies Limited

STANDARD OPERATING PROCEDURE (SoP)

**Change in Subscriber's Personal core Details by Nodal Office
Version 1.4**

REVISION HISTORY

Sr. No.	Date of Revision	Version	Section Number	Description of Change
1		1.0	-	Initial Version
2	30-08-2024	1.1	1 (C)	• Name change requires PrAO /DTA authorization. • Authorisation by NPS Trust user for subsequent name change
3	24-12-2024	1.2	1 (D)	• Authorisation by CRA user for subsequent name change instead of NPS Trust.
4	18-04-2025	1.3	1 (D)	• Second time name change request to be processed by CRA based on PAN Verification or Penny drop Verification (as instructed by PFRDA)
5	31-12-2025	1,4	-	• Menu Realignment: Options have been reorganized into logical, task-based categories for smoother navigation

Index

Background:

Existing Process:

The subscriber intends to update any of the below mentioned details is required to submit duly filled and signed S2 form and supporting proofs to concerned DDO

- Name
- Date of Birth
- Date of Joining
- Date of Retirement.

Post checking, DDO forwards subscriber details change request along with the documents to concerned PAO/DTO office for verification at PAO/DTO level and onward submission to DTA/Pr AO office.

Pr AO/ DTA office forwards the said request to CRA along with its letter. The same can be submitted either through physical mode or through email by way of scanning copies of documents duly sent through registered email id of PrAO /DTA).

At CRA end, the official verifies the documents provided and processes the subscriber details change request through maker/checker concept if there is no discrepancy in the same. In case of any discrepancy, the same is informed to the Nodal office.

Revised Process:

The existing process involves submission of documents to CRA and processing of the same through CRA end through its login.

As the offices are engaged with their employees, it would be convenient if the said modification can be able to process by offices through their login at nodal office end.

In view of the same, a new functionality is developed wherein subscriber modification can get processed through office end.

The new functionality allows Nodal Office to **Initiate Request, Authorize pending request and view request status** for above mentioned four types of subscriber details in CRA.

- Name,
- Date of Birth,
- Date of Joining
- Date of Retirement.

This functionality will be available on both CRA and NPSCAN website.

The Matrix for the above-mentioned updation is as follows:

Flow Matrix for Name Change Request		
Request Initiation by	**Verification**	**Authorization**
DDO	PAO/DTO	PrAO/DTA
PAO/DTO	-	PrAO /DTA
PrAO/DTA (User 1)	-	PrAO/DTA (User 2)

Flow Matrix for (Subsequent) Name Change Request				
Request Initiation	**Verification**	**Authorization**	**Authorization**	**Authorization**
DDO	PAO/DTO	PrAO/DTA	NPS Trust (User 1)	NPS Trust (User 2)
PAO/DTO	-	PrAO/DTA	NPS Trust (User 1)	NPS Trust (User 2)
PrAO/DTA (User 1)	-	PrAO/DTA (User 2)	NPS Trust (User 1)	NPS Trust (User 2)

Flow Matrix for DoB/DoJ/DoR Change Request		
Request Initiation	**Verification**	**Authorization**
DDO	PAO/DTO	PAO/DTO
PAO/DTO (User 1)	-	PAO/DTO (User 2)
PrAO/DTA (User 1)	-	PrAO/DTA (User 2)

Documents required for Subscriber Name Change:
*(Allowed document type:- *.jpeg, *.jpg, *.png, or *.pdf format and size of each document should be between 2KB to 2MB.*

Type of Request	Name change	Marriage	Correction and Other
Document to be uploaded	Self-attested gazette copy	Self-attested gazette copy/Marriage certificate	Self-attested POI
	Self-attested POI in old name	Self-attested POI in old name	Extract of service records
	Self-attested POI in new name	Self-attested POI in new name	S2 Form
	Extract of service records with new name	Extract of service records with new name	
	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)**
(Allowed document type-: .pdf,.jpg,.jpeg between size 12 KB to 5 MB.)

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

Documents required for Subscriber Date of Joining: **(any one from the list)**
(Allowed document type-: .pdf,.jpg,.jpeg between size 12 KB to 5 MB.)

- ➢ Appointment/Offer Letter
- ➢ Employee ID card

Documents required for Subscriber Date of Retirement: **(any one from the list)**
(Allowed document type-: .pdf,.jpg,.jpeg between size 12 KB to 5 MB.)

- ➢ Appointment/Offer Letter
- ➢ Employee ID card

Note:

The Ack ids generated needs to be authorised within ==15 days of initiation otherwise the Ack id gets auto-cancelled.==

1. **Modification in Subscriber Name**

   A. **Name Change Request initiation by PAO/DTO/DDO**

➤ DDO/PAO office will log in to CRA https://cra.nps-proteantech.in/CRA/. Enter **"User ID"** and password click on **"Submit"** *(Please refer Figure 1).* Enter Aadhaar ID details and OTP for Aadhaar based login.
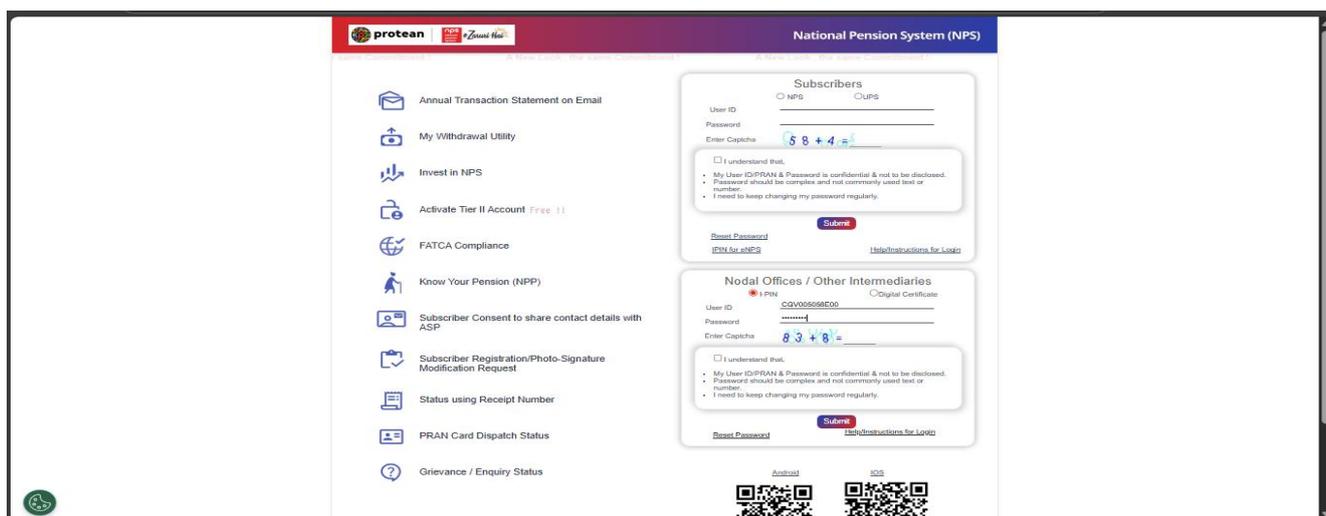
Figure 1

➤ Click on option **"Subscribe maintenance"** and sub menu **" Update Name_DoB_DoR_DoJ"** *(Please refer Figure 2)*
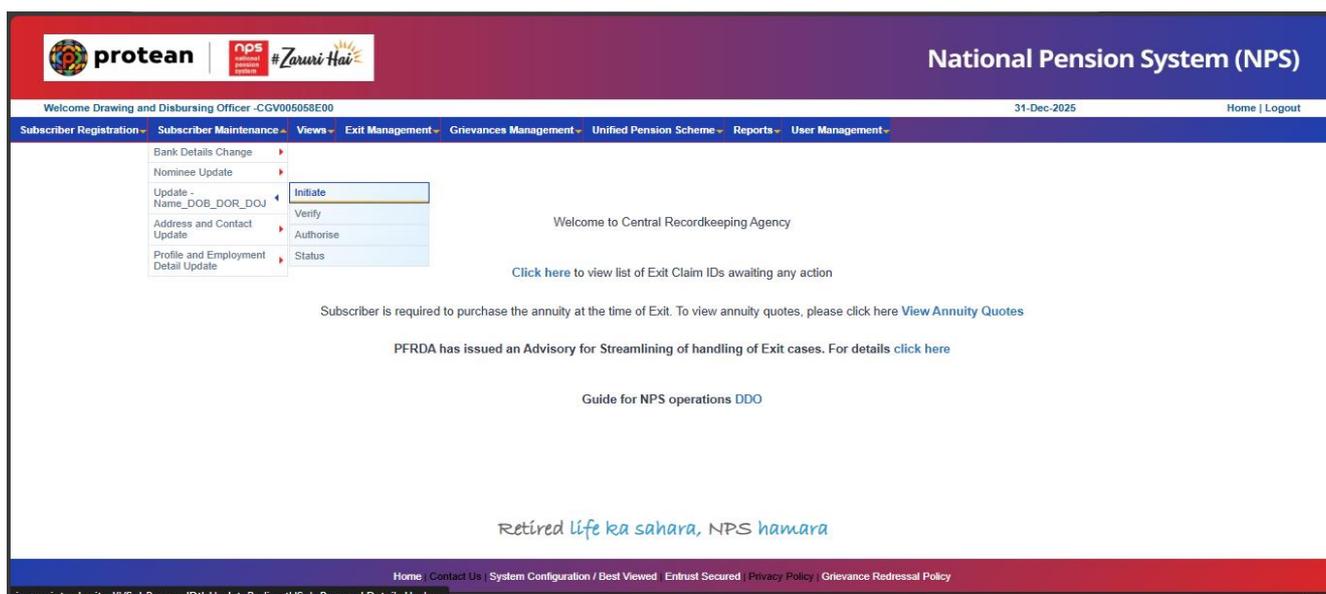
Figure 2

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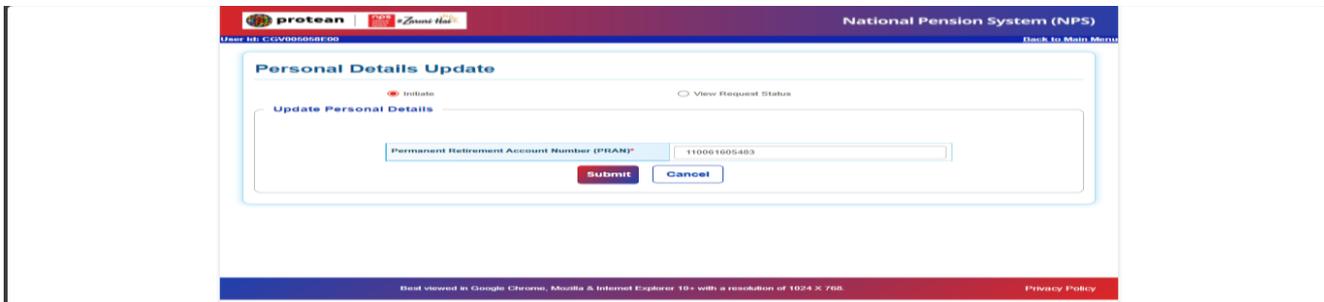
Figure 3

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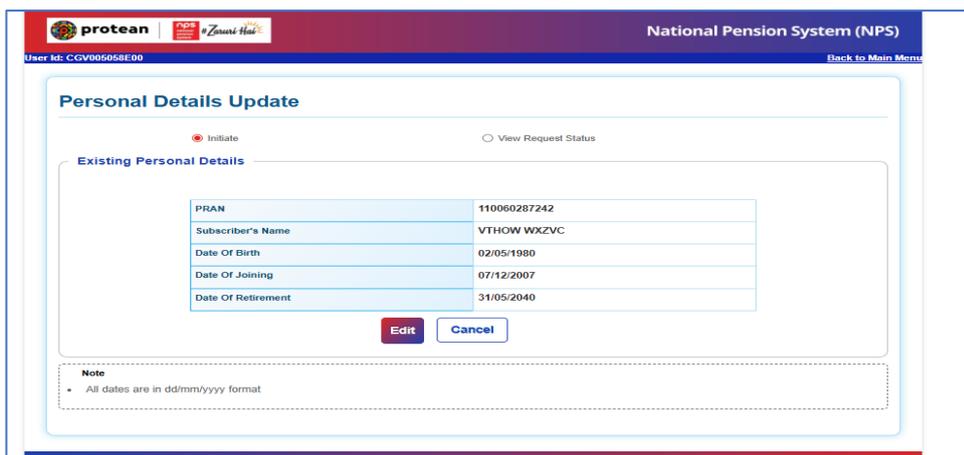
Figure 4

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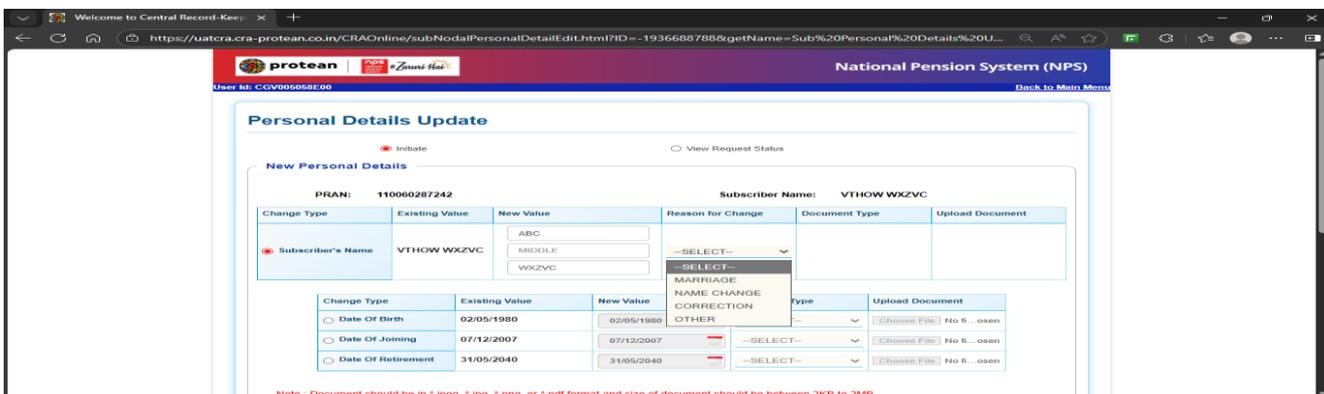
Figure 5

➢ Upload the supporting documents as a proof for name change and tick on the declaration. Select for physical card PRAN card option in case new card is required and click on **"Submit"** *(Please refer Figure 6 and 7).*

Figure 6 &Figure 7

It is the responsibility of the office to check veracity of documents as provided by the subscriber. Also, the office has to ensure that the name to be updated is as per service record of the office. (The office needs to tick on the box confirming the same as mentioned above in figure 7)

➢ New details as captured in CRA system will be visible on screen**"** *(Please refer Figure 8).* Click on **"Confirm"**
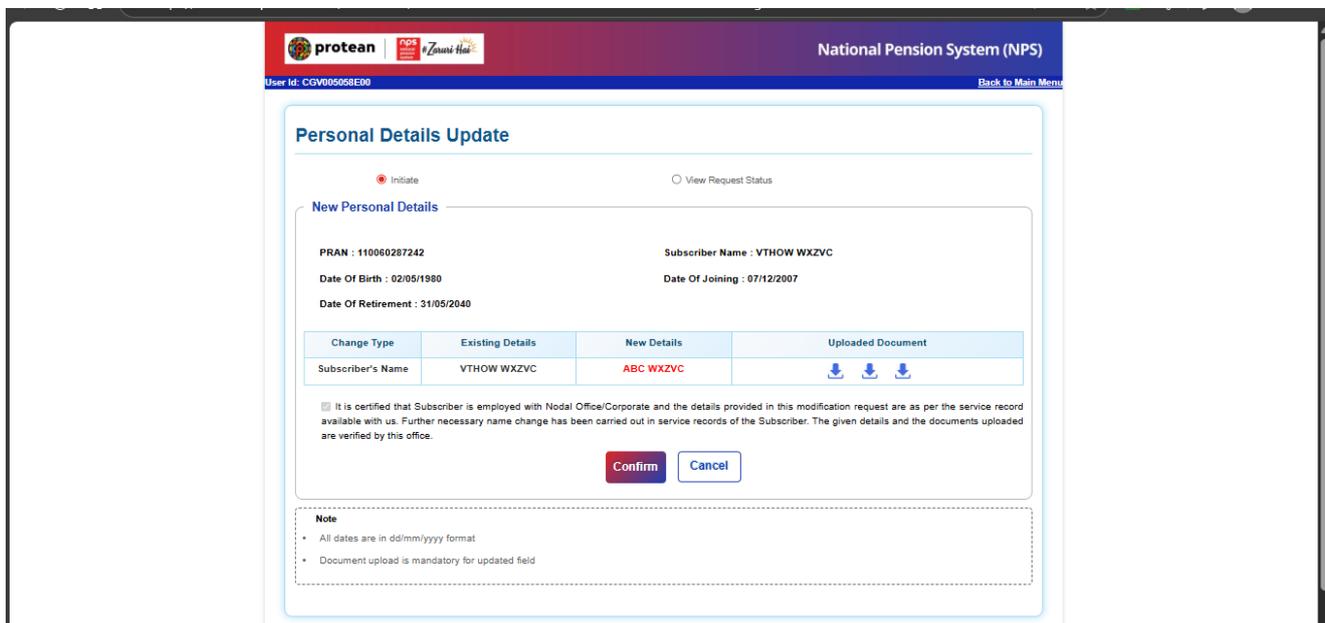
Figure 8

➢ The request will be captured successfully, and acknowledgement number (ACK ID) will be displayed on screen**.** *(Please refer Figure 9).*
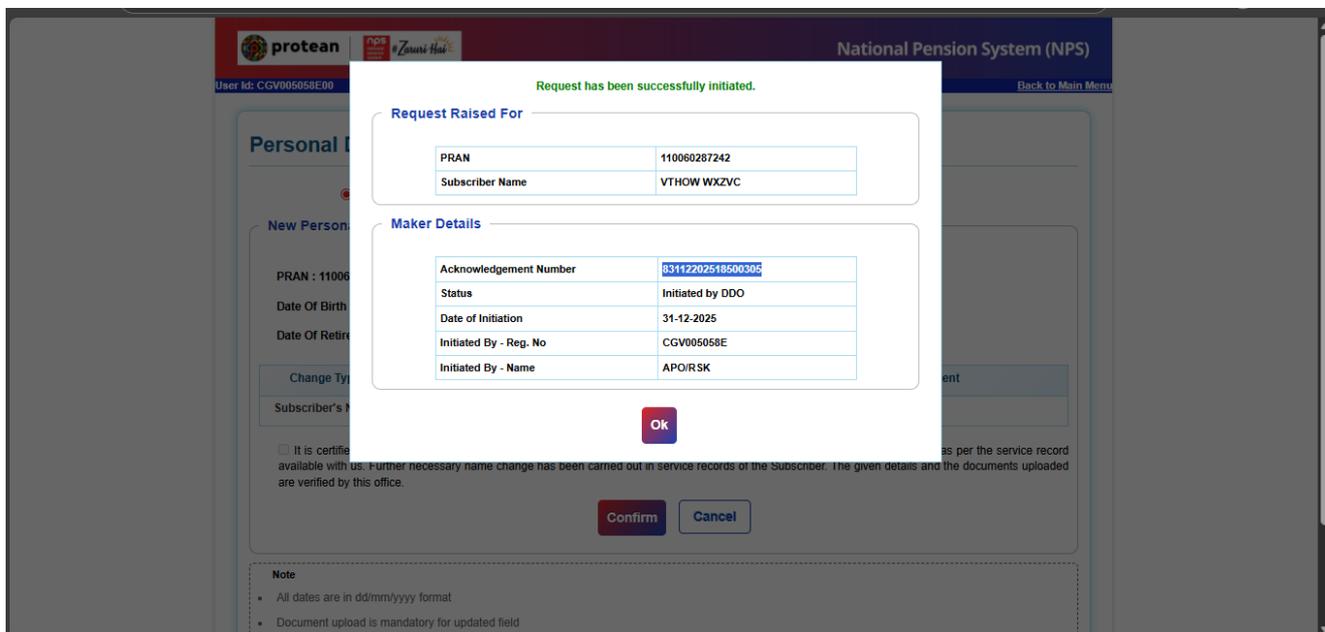
Figure 9

> ➤ The office can check the status of the ACK ID in its login. To view the status of a request, click on "Subscribe maintenance" →" and sub menu **" Update Name_DoB_DoR_DoJ"→ "View Request Status"-→ "Submit"** *Please refer Figure 10 and 11).*

Figure 10

Figure 11

B. Name Change Request Verification PAO/DTO office

Name change request initiated by DDO nodal office needs to be **verified by PAO/DTO nodal office** for further authorization by PrAO/DTA office.

In case PAO/DTO nodal office has initiated the change request, PrAO/DTA office needs to authorize the request. (There is no verification for such requests).

Verification of request by PAO /DTO:

➢ PAO/DTO nodal office will log in to CRA portal CRA: https://cra.nps-proteantech.in/CRA/ Enter **"User ID"** and password click on **"Submit"** *(Please refer Figure 12).* Enter Aadhaar ID details and OTP for Aadhaar based login.
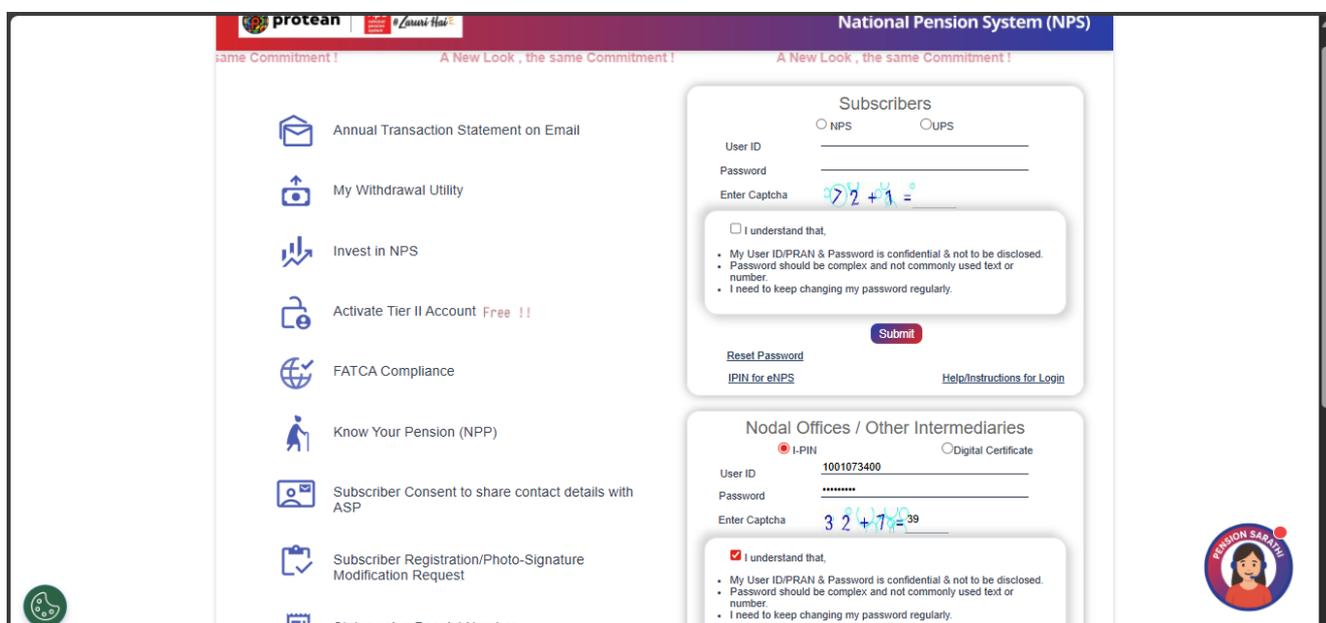
Figure 12

➢ Click on option **"**Subscribe maintenance"-→ and sub menu **"Update Name_DoB_DoR_DoJ"**--→ **"Verify".** Enter PRAN/acknowledgement ID. Click on **"Submit."**

(Please refer Figure 13 and 14)
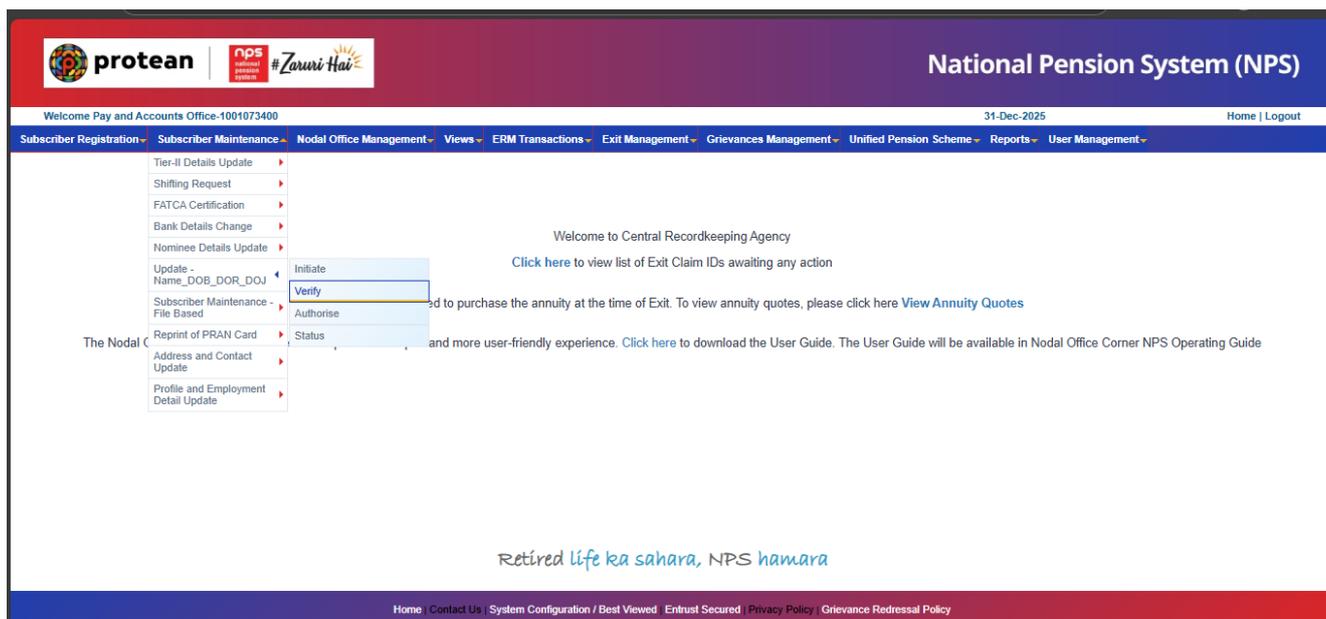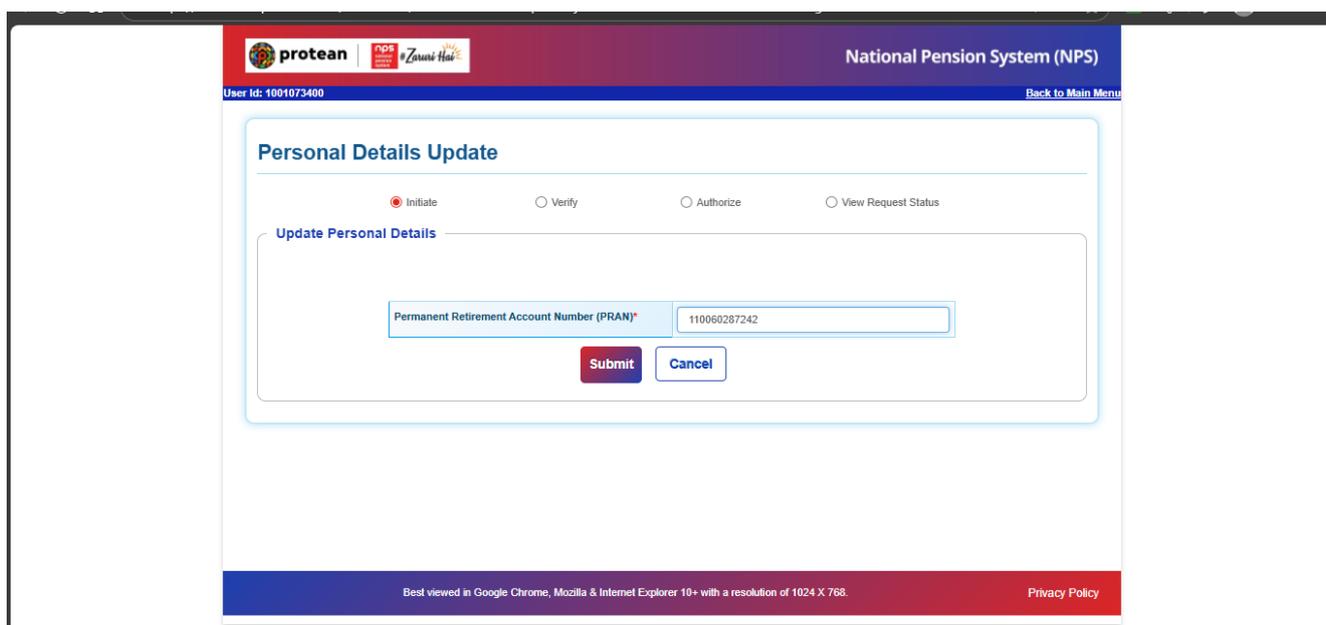
Figure 13

Figure 14

➢ Details of a pending request will be visible on screen. *(Please refer Figure 15 and 16).*
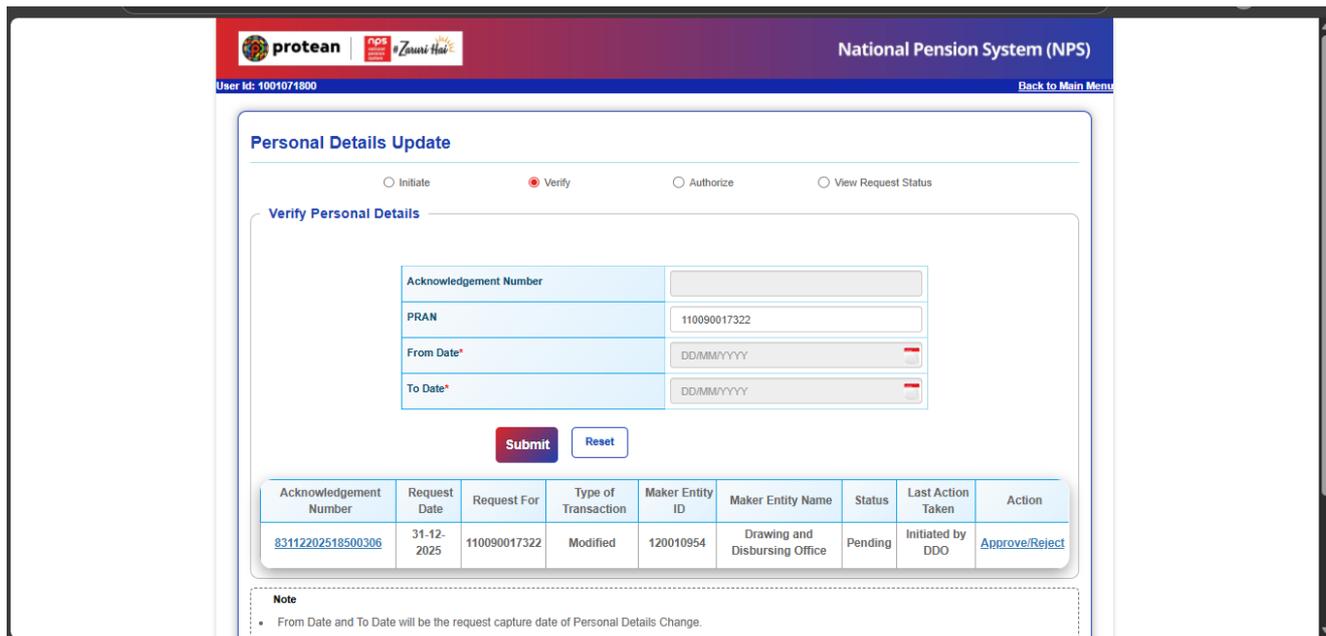To check and verify the details entetred by DDO office, click of hyperlink "Acknowledgement number".
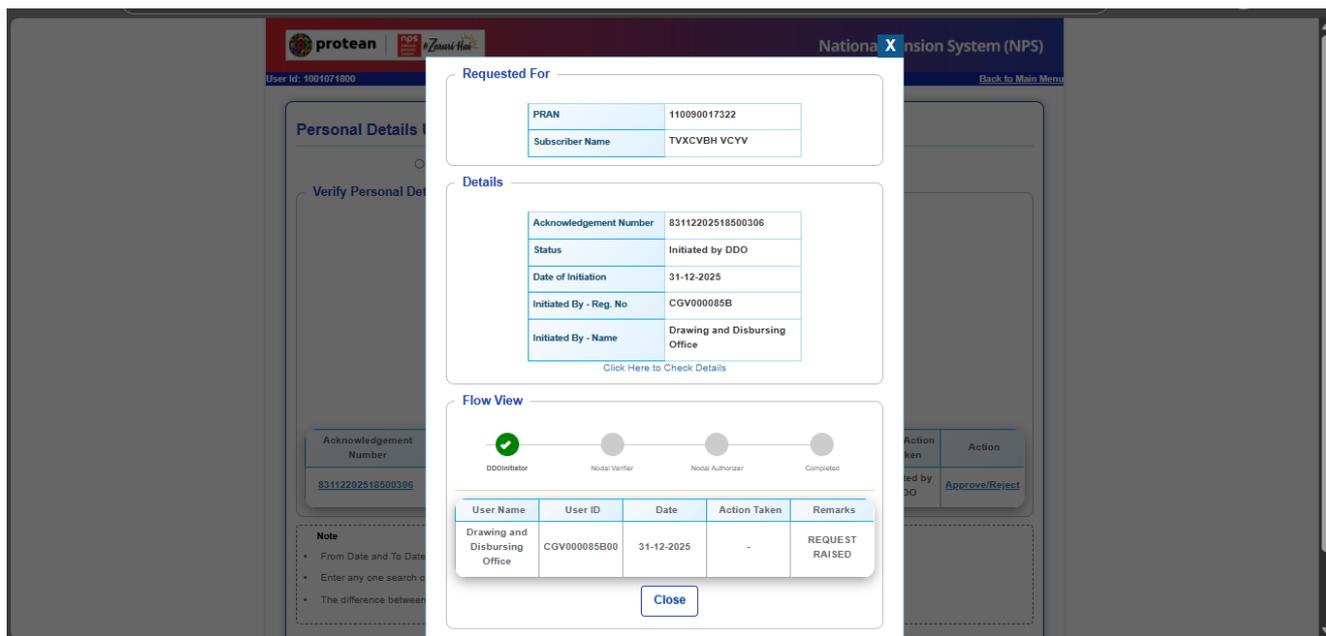
Figure 15

Figure 16

➢ PAO/DTO nodal office can Approve/Rejet the request based on details enterered and documents uploaded in CRA system. To see the upoded documents click on **"Uploaded document"** icon *(Please refer Figure 17)*

Figure 17a

It is the responsibility of the office to check veracity of documents as provided by the subscriber. Also, the office has to ensure that the name to be updated is as per service record of the office. (The office needs to tick on the box confirming the same as mentioned above in figure 17a)

➢ Click on **"Accept/ reject"** and click on "Approve" the details. *(Please refer Figure 17b).*

Figure 17b
In case of rejection, it is necessary to enter the reason for rejection in the Remarks section.

➢ The system will request to confirm the request once again wherein the officer needs to click on confirm button. The offficer can click on cancel to go back to previous menu. *(Please refer Figure 18).*
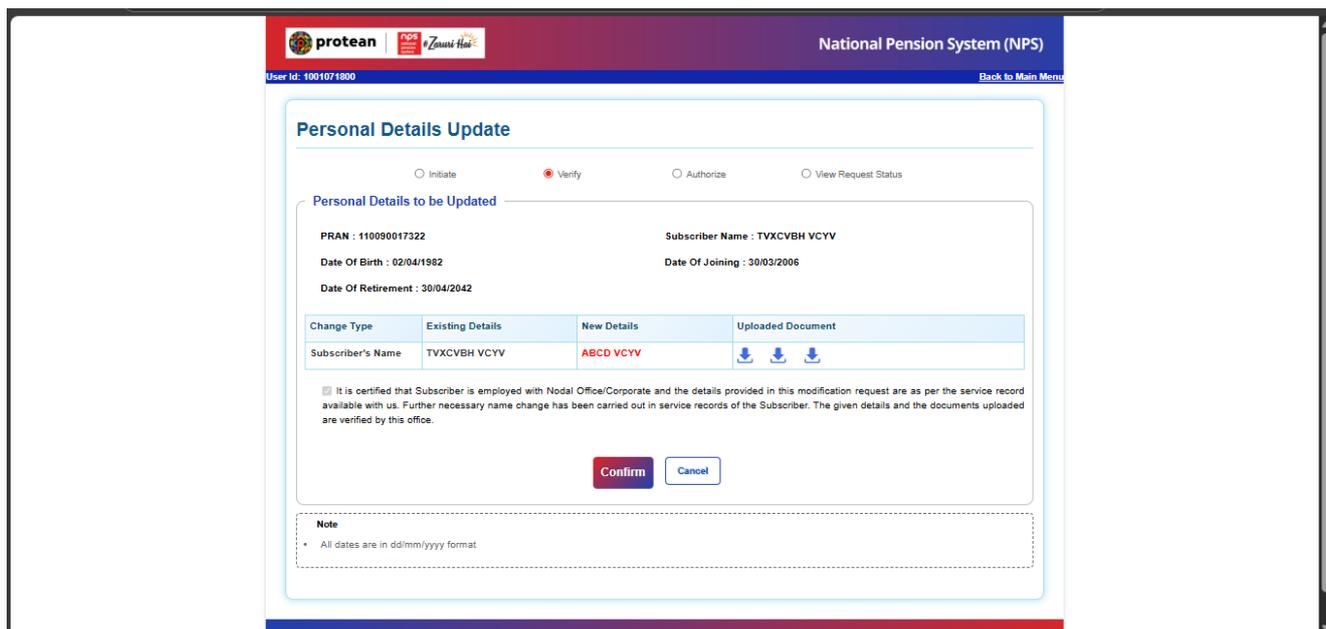
Figure 18

➢ On successful verification of request, the acknowlwdgement details will be visible on screen,finally click on " OK" *(Please refer Figure 19).*
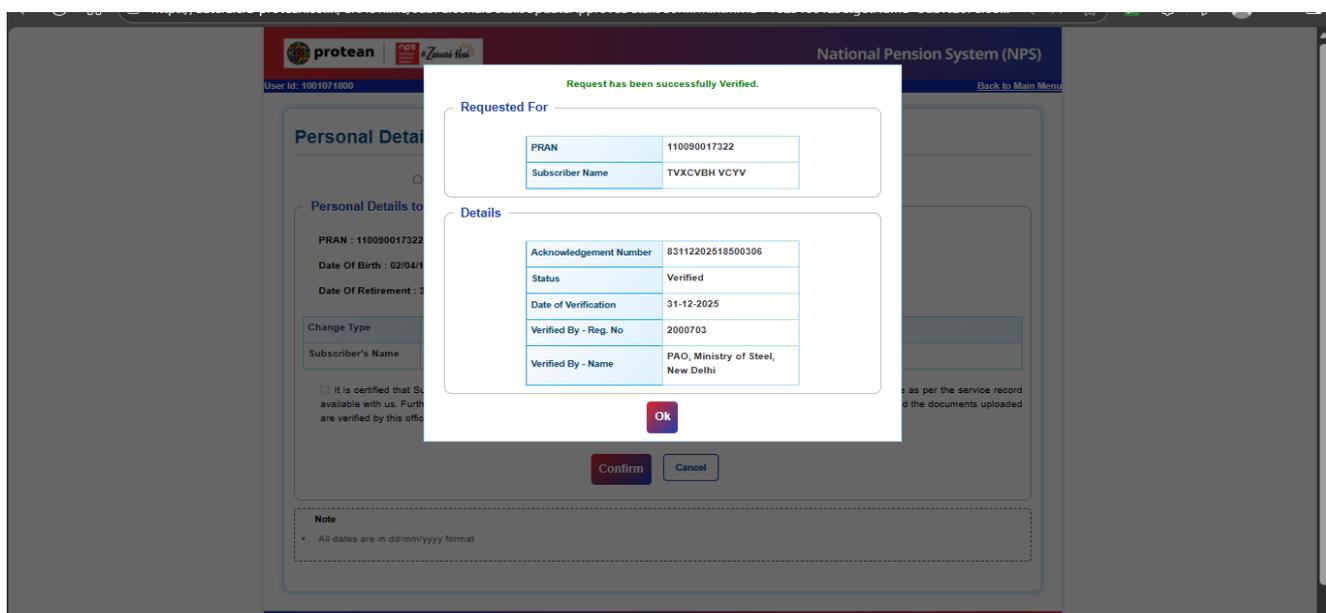

Figure 19

➢ To view status of request, click on "Subscribe maintenance" → and sub menu **"Update Name_DoB_DoR_DoJ"** → **"View Request Status"-→ "Submit"** *(Please refer Figure 20 & 21).*
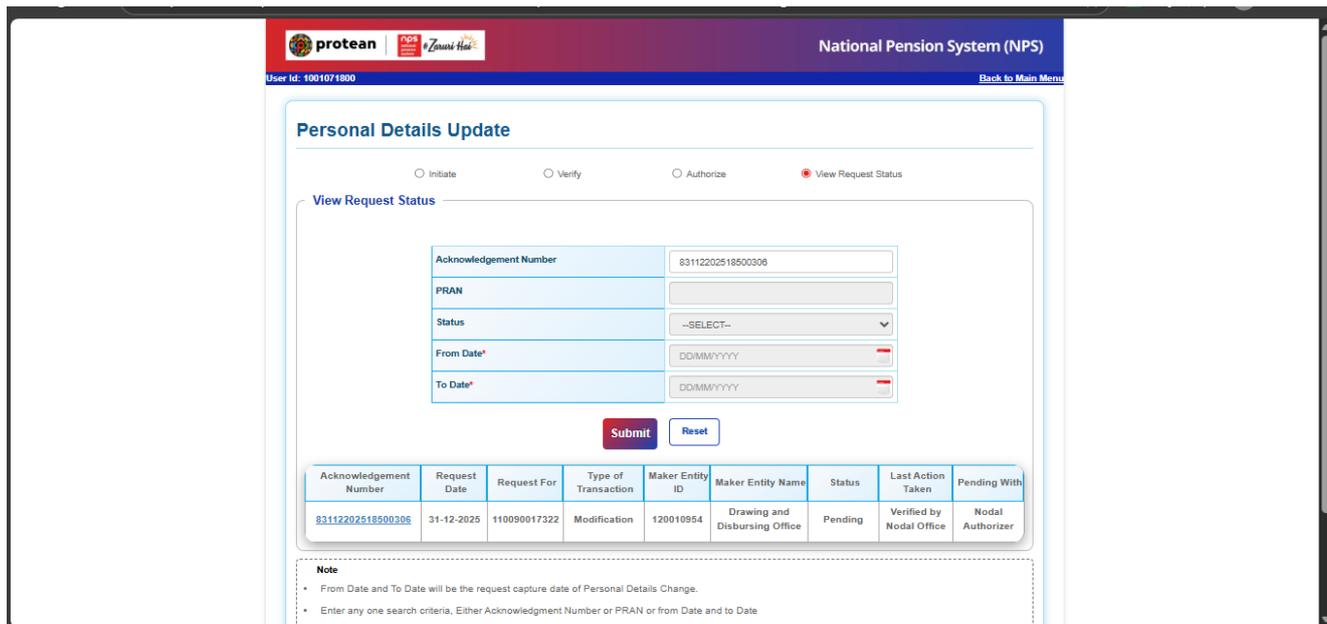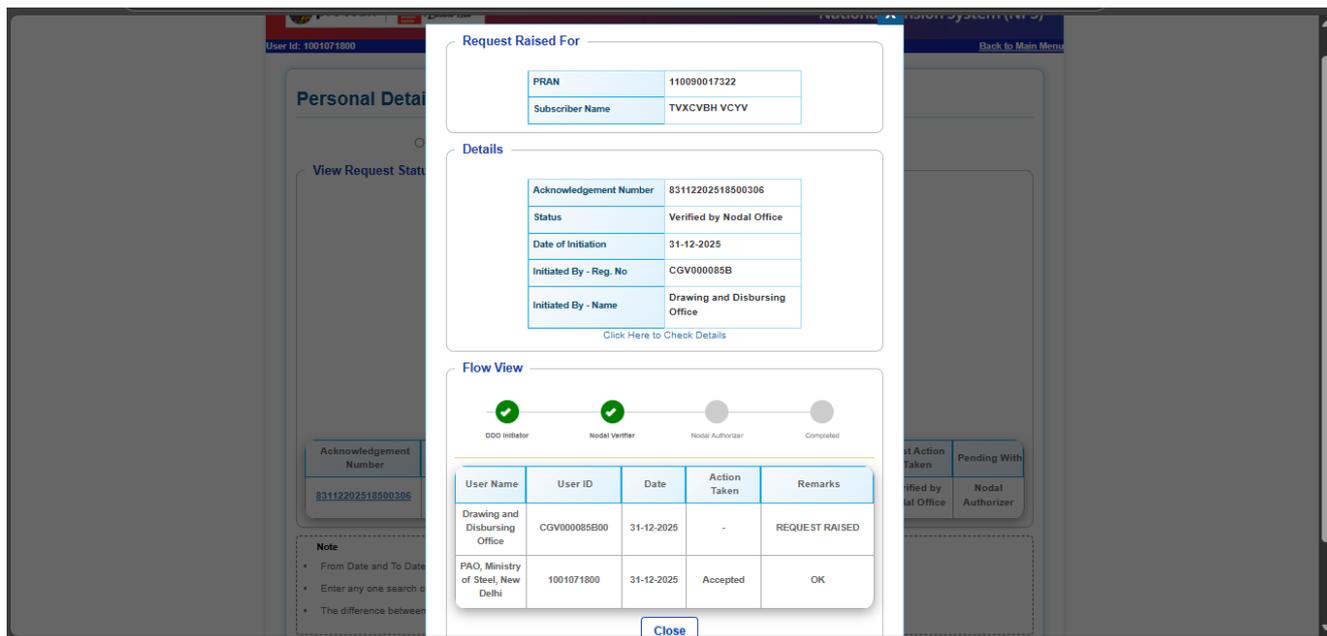
Figure 20

Figure 21

C. Name Change Request Authorization PrAO/DTA office

➢ PrAO/ DTA nodal office will log in to CRA portal https://cra.nps-proteantech.in/CRA/ Enter **"User ID"** and password click on **"Submit"** *(Please refer Figure 22).* Enter Aadhaar ID details and OTP for Aadhaar based login.
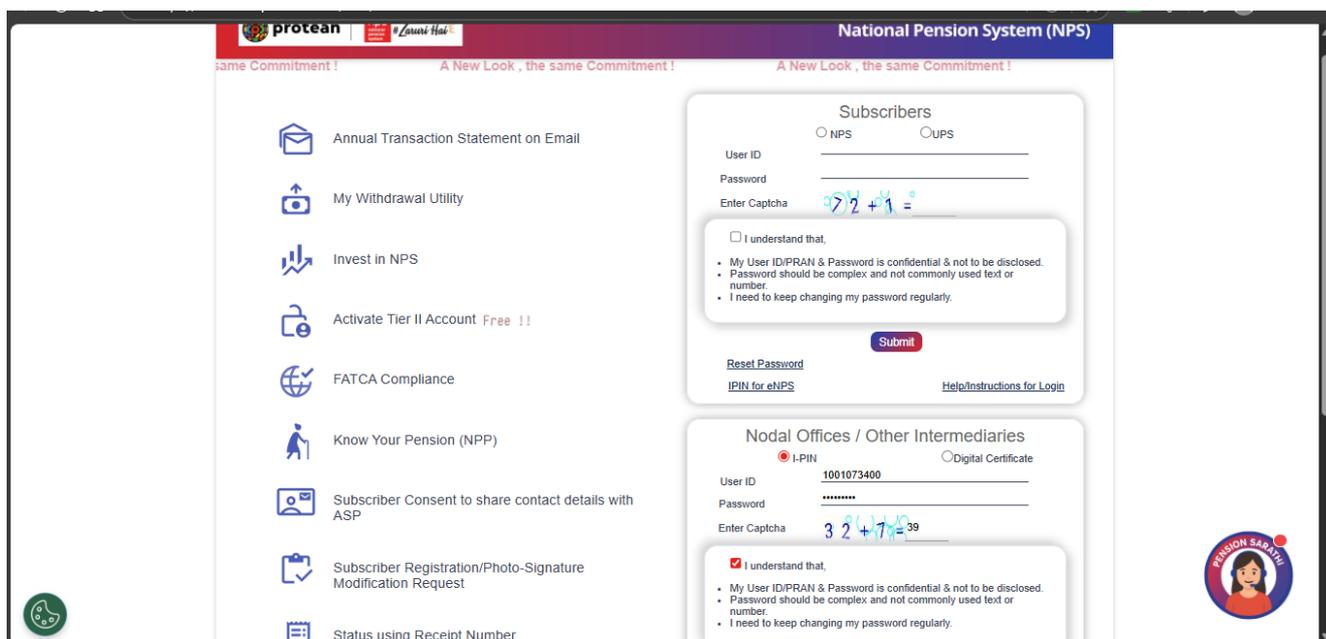

Figure 22

➢ Click on option **Subscribe maintenance** → and sub menu **"Update Name_DoB_DoR_DoJ"** → **"Authorize".** Enter PRAN/acknowledgement ID. Click on **"Submit."**
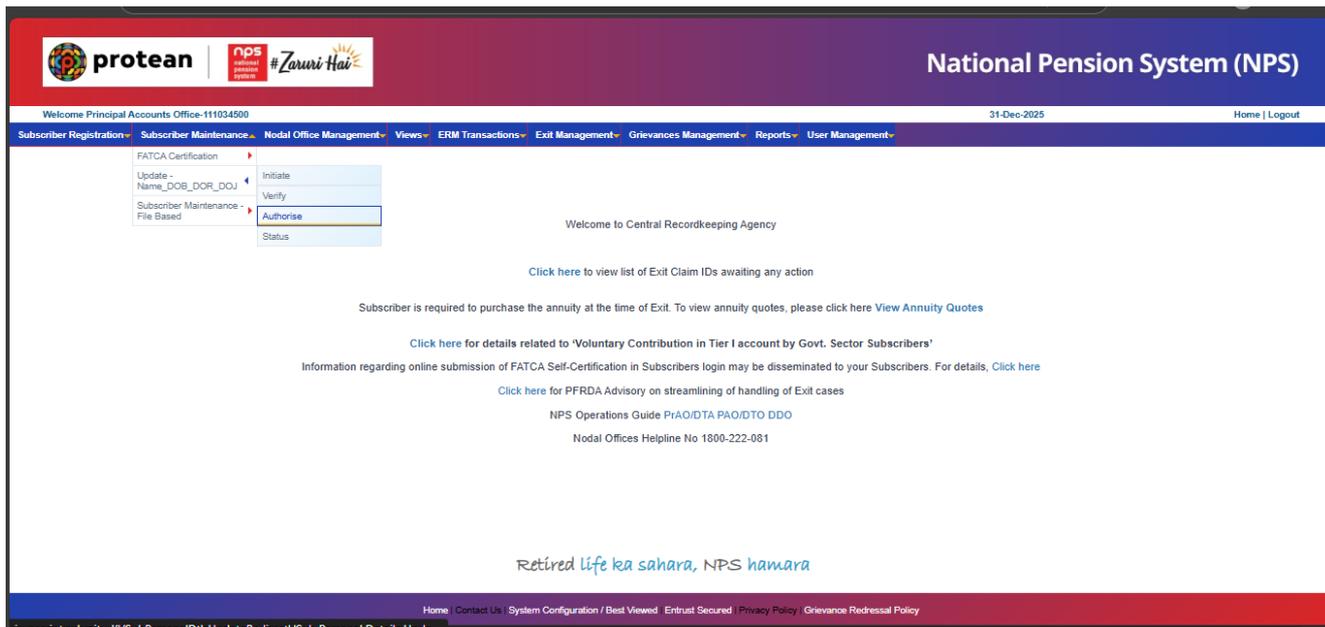
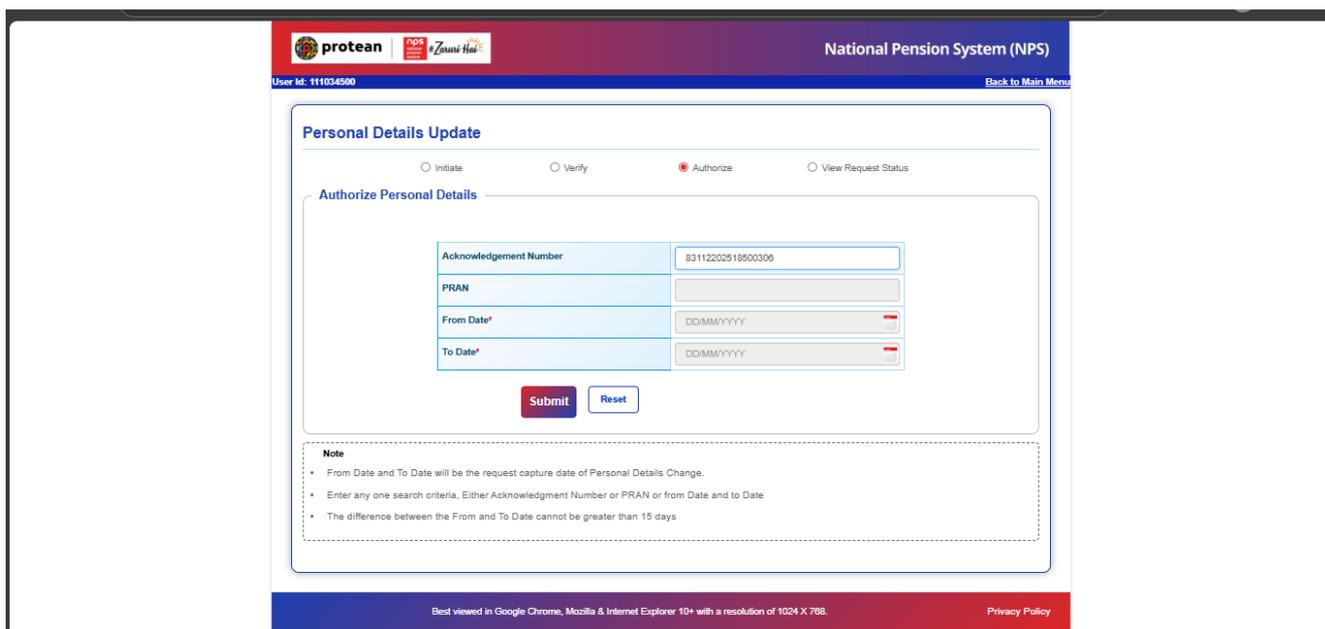*(Please refer Figure 23 and 24)*

Figure 23

Figure 24

> ➤ The official needs to click on Approve/Reject hyperlink so that the changes made in subscriber name will appear on the screen along with uploaded documents icon (refer figure 25).

Figure 25

➢ PrAO/DTA nodal office can Approve/Rejet the request based on details enterered and documents uploaded in CRA system. To see the upoded documents, click on **"Uploaded document"** icon.

The official needs to provide remarks for approval/rejection of request while authoriation. *(Please refer Figure 26).*

➢ Click on **"ACCEPT OR REJECT with reason"** and click on approve or back to submit the details.

Figure 26

➢ The office needs to confirm the request once again wherein the officer needs to click on confirm button. The offficer can click on cancel to go back to previous menu. (refer figure 27).
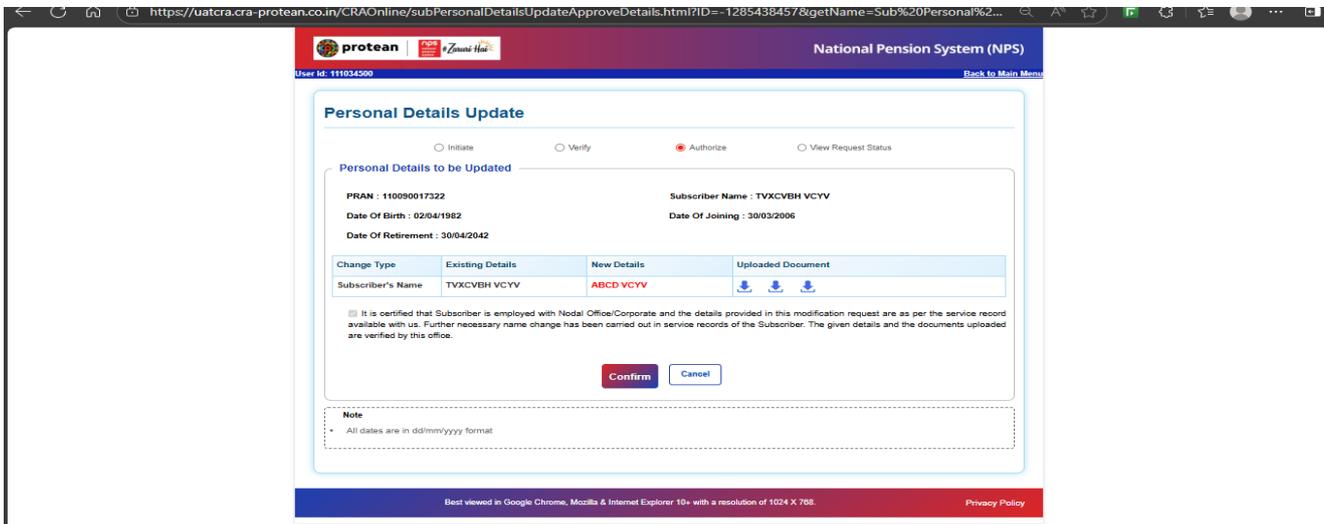
Figure 27

It is the responsibility of the office to check veracity of documents as provided by the subscriber. Also, the office has to ensure that the name to be updated is as per service record of the office. (The office needs to tick on the box confirming the same as mentioned above in figure 28)

➢ On successful authorization of request, the acknowlwdgement details will be visible on screen then Click OK. *(Please refer Figure 29).*
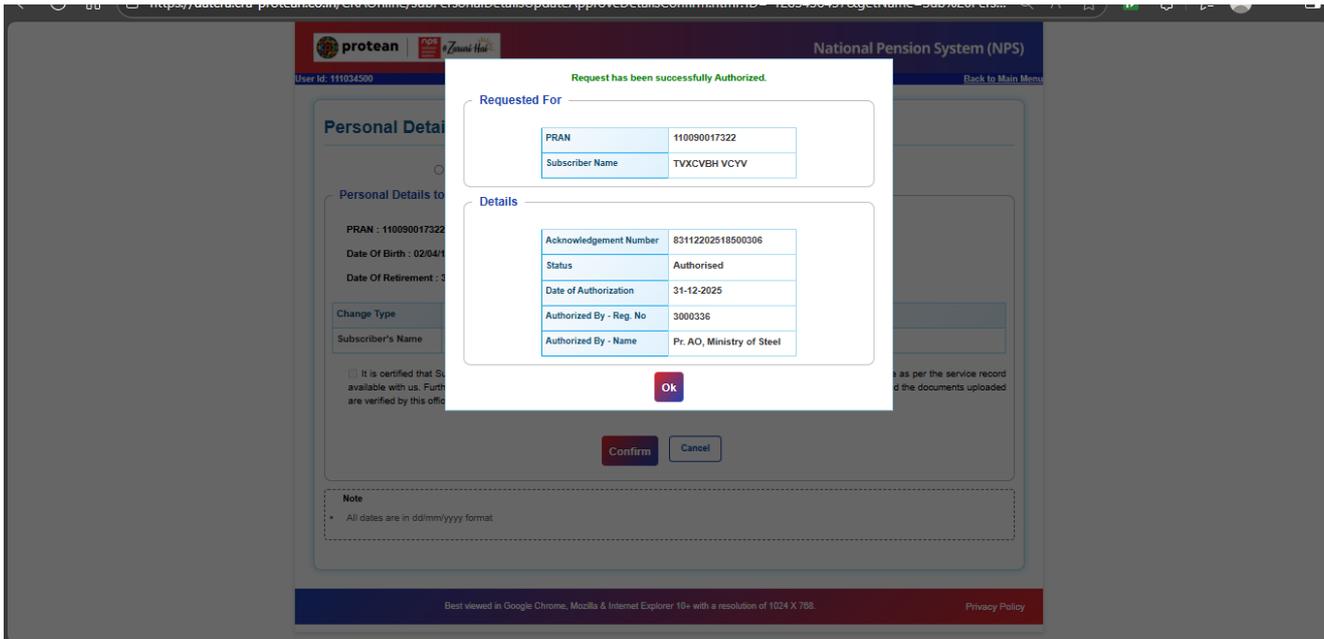
Figure 28

➢ To view status of request, click on "Subscriber maintenance"" →"And sub menu **" Update Name_DoB_DoR_DoJ"**→ **"View Request Status"-**→ **"Submit"** (*Please refer Figure 29/30).*
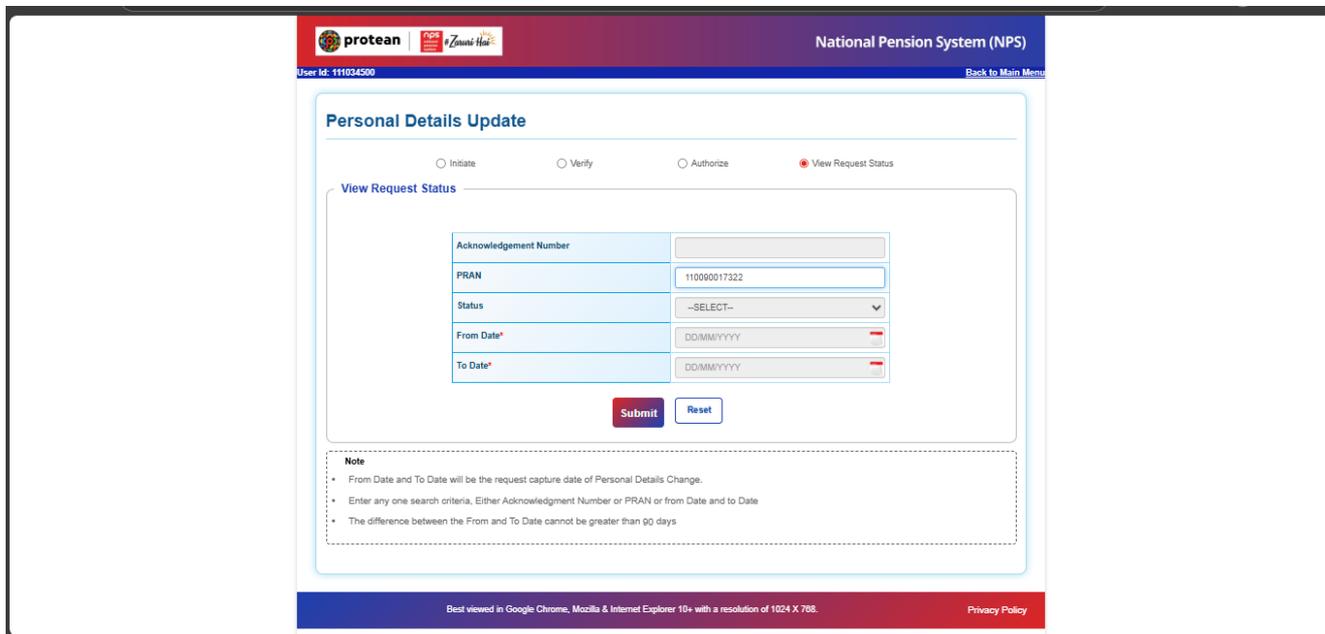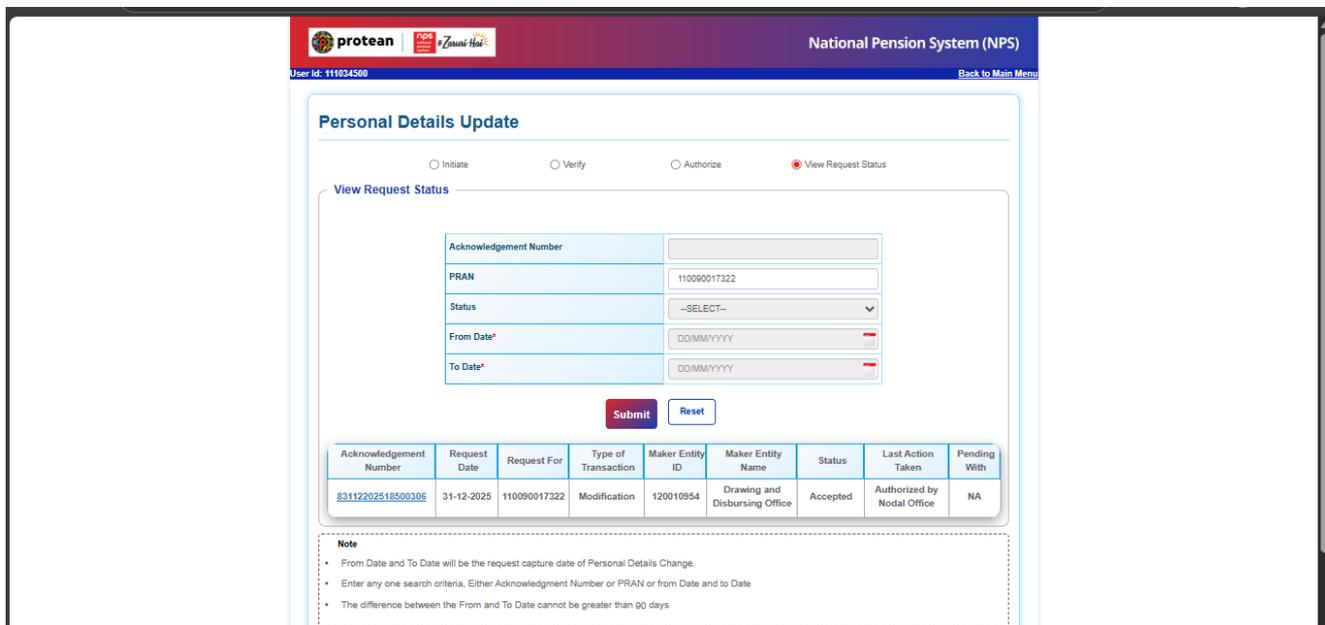

Figure 29

Figure 30

D. Subsequent name change request received for the same subscriber:

In case if name change request is received again second time for same subscriber, the said request is required to be verified and authorised by CRA user once authorisation is done through PrAO/DTA.

The initial process will remain the same as mentioned above. Once the request is authorised by PrAO/DTA, the name will be updated only the same is verified and authorised by CRA user.

PrAO/DTA office is requested to send scan copy of name change request letter to CRA for processing.

The second time (and subsequent) name change request will be processed by CRA after carrying out verification of Subscriber's name either,

- Through Online PAN verification process [i.e. with name registered in PAN with Income Tax Department (ITD)] or
- By carrying out penny drop verification with name matching on the basis of registered bank details in the PRAN.

In case Subscriber's name to be updated does not match with ITD or in the bank account, then the request will be rejected by CRA.

Nodal Office is requested to ensure that Subscriber's Bank Account Details and/or PAN are registered in PRAN before processing second time (and subsequent) name change request in CRA

2. Modification in Date of Birth (DoB)

- Date of Birth (DoB) change request Initiated by PAO/DTO nodal office through user 1 can be authorized by PAO/DTO nodal office through User 2.
  (In case request is initiated by DDO office, the same is to be verified by PAO/DTO office through user id one and authorised by PAO/DTO office through user id 2).

  In this SOP, we have explained the process of request initiated by PAO/DTO user ID 1and authorised by PAO/DTO through user ID 2.

A) Date of Birth Change Request initiation by PAO/DTO

- PAO/DTO office will log in to CRA portal https://cra.nps-proteantech.in/CRA/ Enter **"User ID"** and password click on **"Submit"** *(Please refer Figure 31).* Enter Aadhaar ID details and OTP for Aadhaar based login.
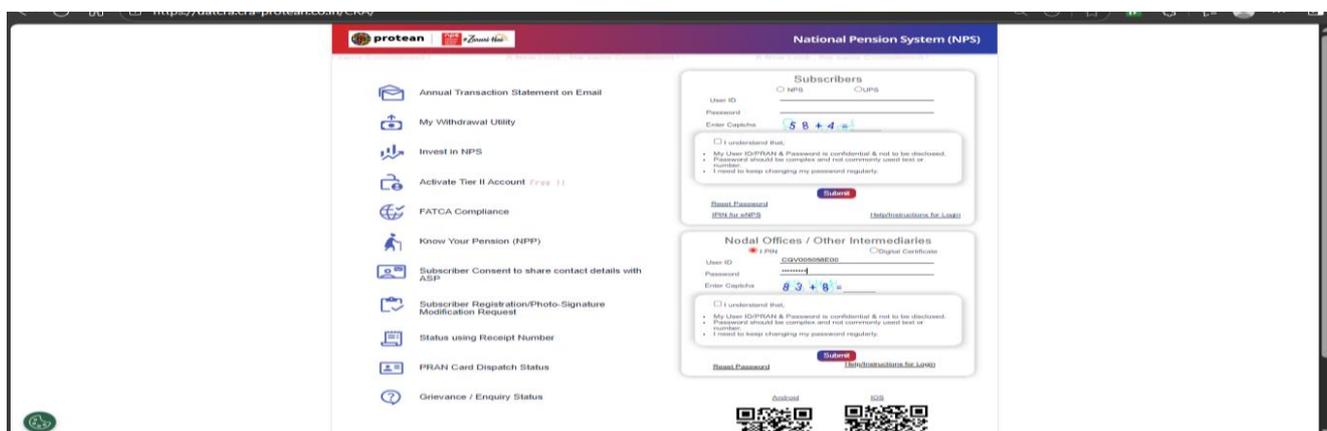
Figure 31

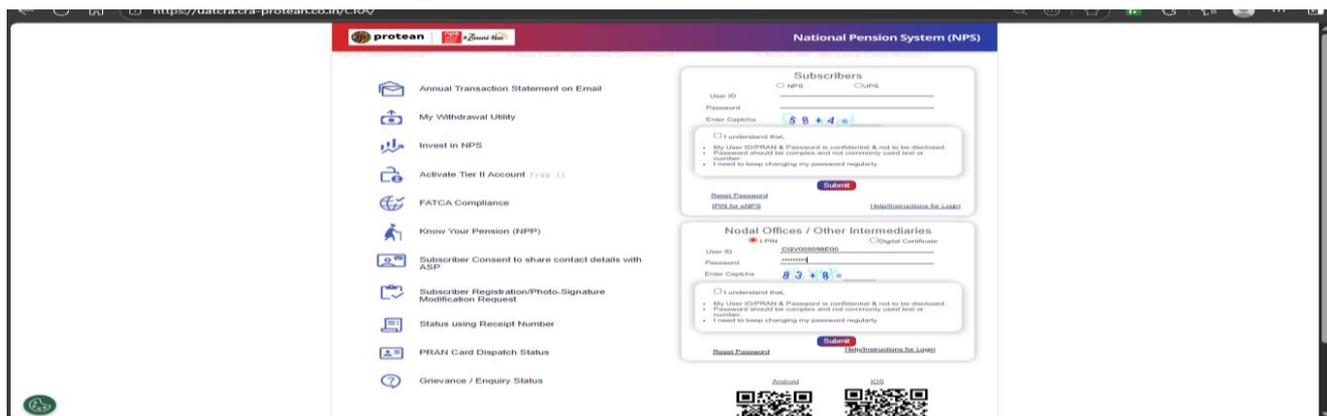- Click on option **""Subscribe maintenance"** and sub menu **and sub menu "Update Name_DoB_DoR_DoJ"** *(Please refer Figure 32)*
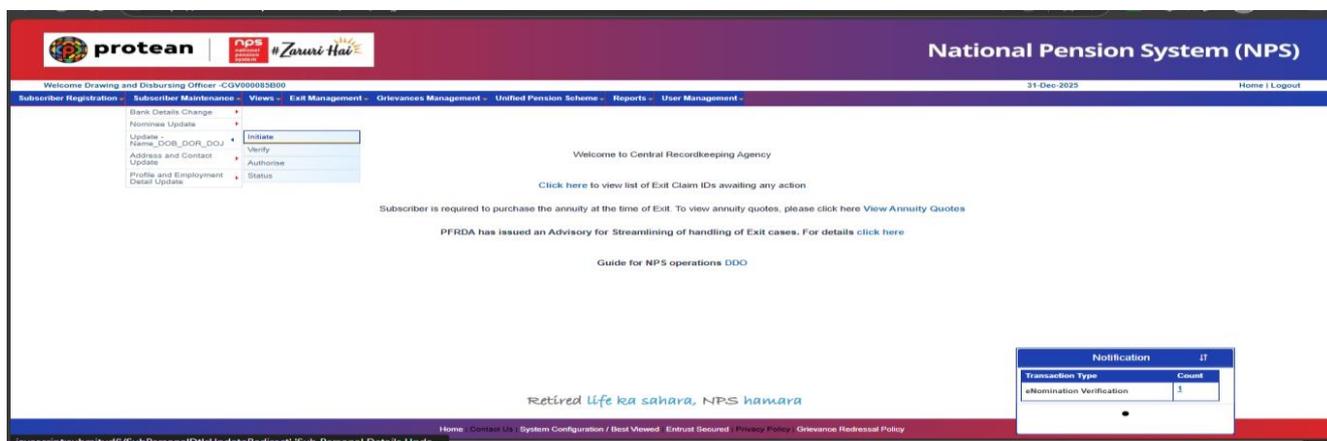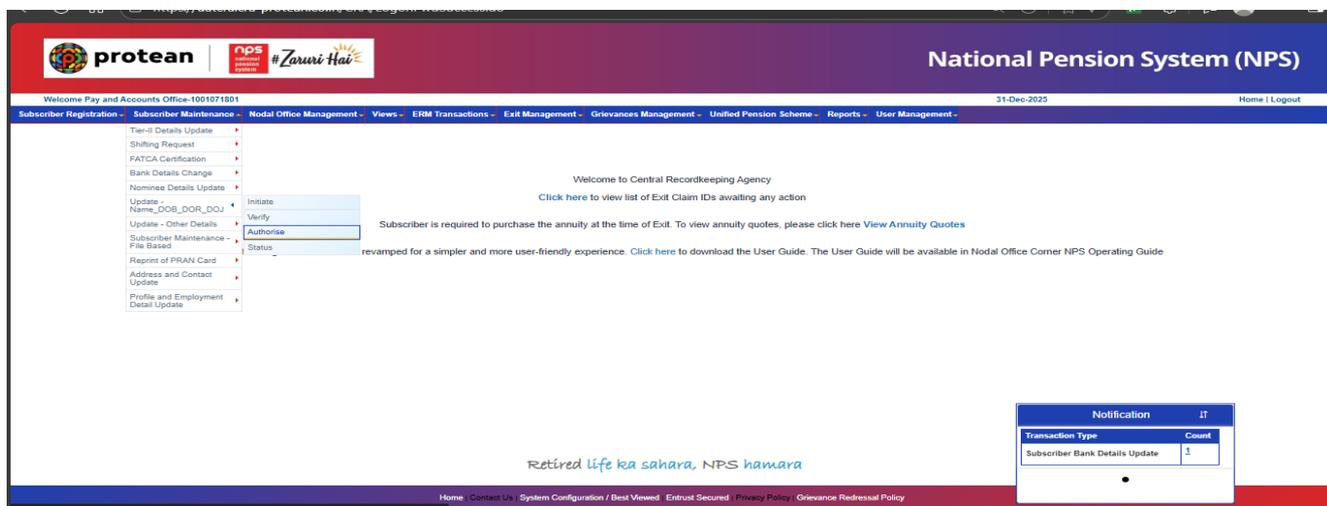

Figure 32

➢ Click on option **"Initiate"** and Enter PRAN. Click on **"Submit"** *(Please refer Figure 33)*
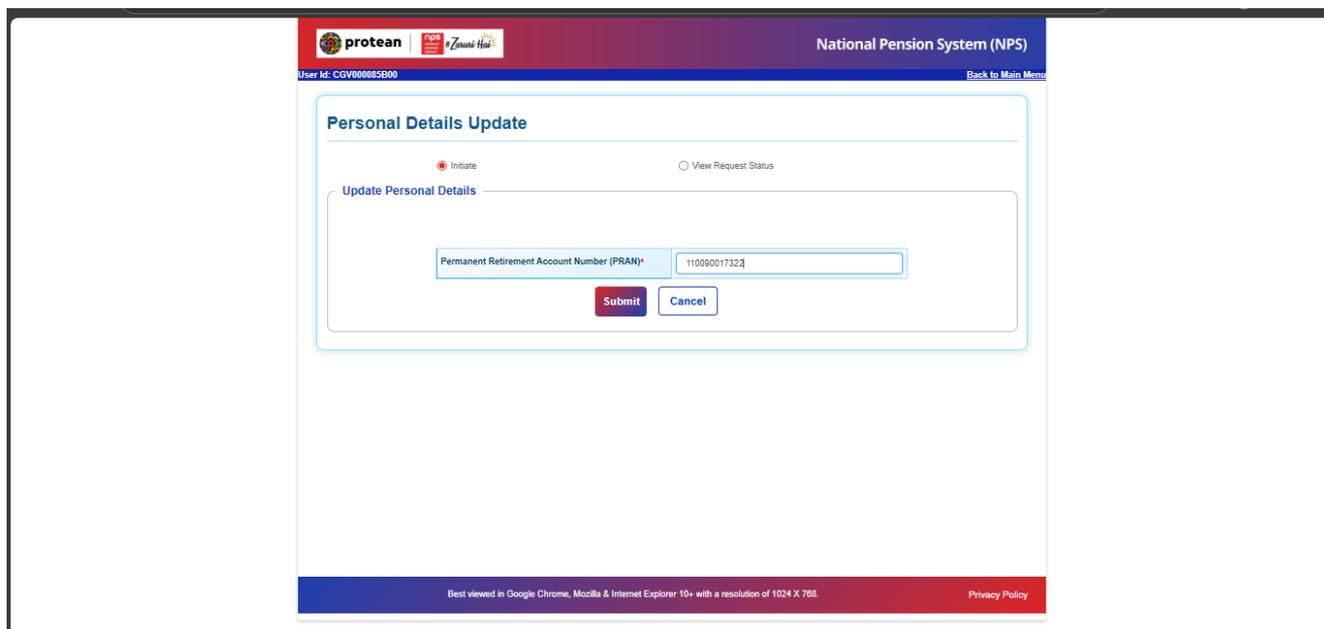
Figure 33a

➢ Existing subscriber details available in CRA will be displayed on screen. The office needs to click on **Edit button (refer figure 33b)**
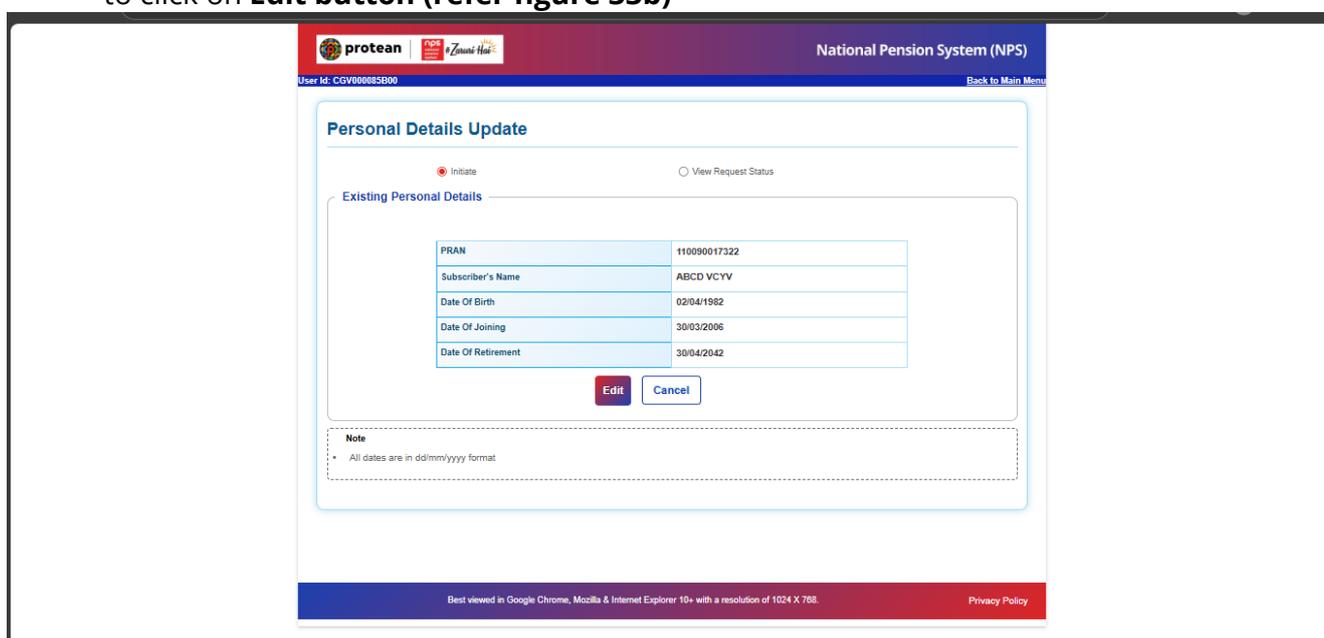
Figure 33b

➢ Select the Change Type **as "Date of Birth".** Select supporting proof form as available in the list and Upload the document. Tick the declaration. Click on **"Submit"** *(Please refer Figure 34 and 35).*

Figure 34& 35

The subscriber is having option to receive PRAN card either through e-PRAN or can opt for physical copy of the same. The office can click on the option of the physical PRAN card required as Yes if the subscriber intends to receive physical PRAN card and submit accordingly.

➢ Updated DoB will be visible on screen click on "Confirm" to proceed. *(Please refer Figure 37).*
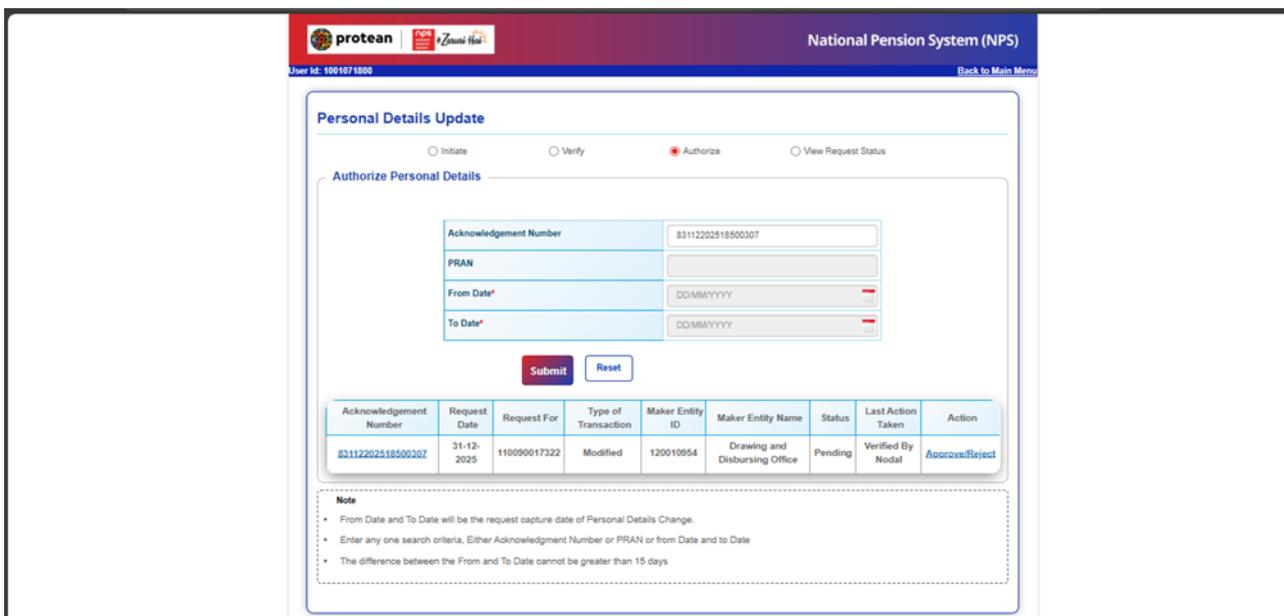

Figure 36

It is the responsibility of the office to check veracity of documents as provided by the subscriber. Also, the office has to ensure that the details are updated in service record of the office. (The office needs to tick on the box confirming the same as mentioned above in figure 27)

➢ Once the office clicks on confirm button, the details will be saved successfully, and acknowledgement number (ACK ID) will be visible on screen. *(Please refer Figure 37).*
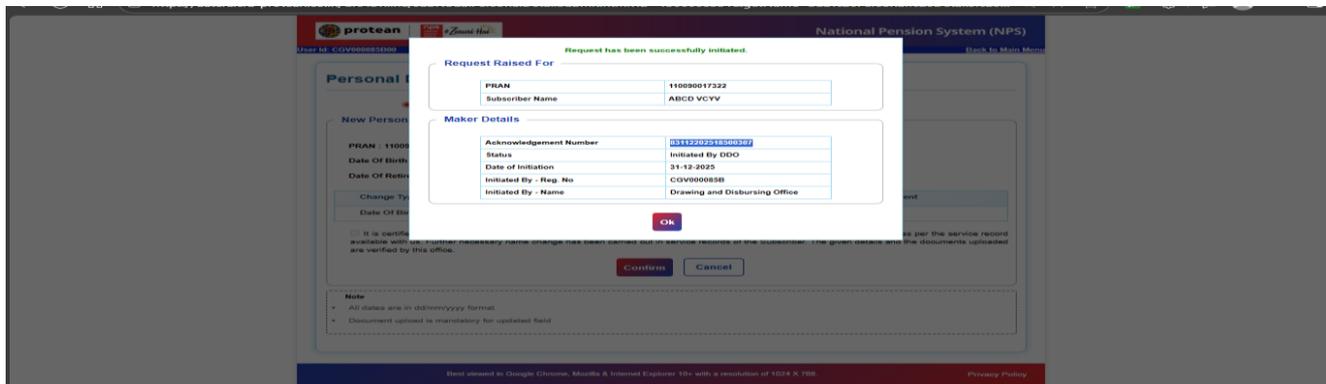
Figure 37

➢ Status of request can be seen in CRA log in. *(Please refer Figure 38).*
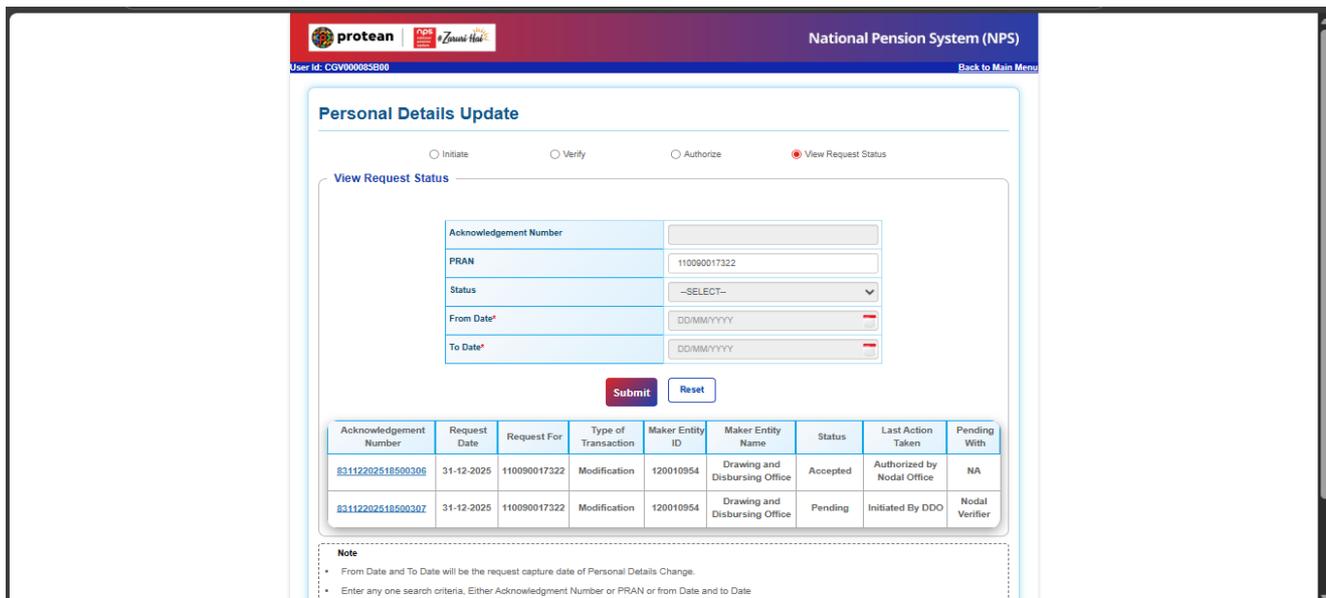
Figure 38

B. DoB change request Authorization by PAO/DTO Office

Date of Birth (DoB) change request Initiated by nodal office PAO/DTO user 1 needs to be Authorised by PAO/DTO nodal office through another User id i.e. user 2.

➢ PAO/DTO office will log in to CRA portal https://cra.nps-proteantech.in/CRA/ Enter **"User ID"** and password click on **"Submit"** *(Please refer Figure 39).* Enter Aadhaar ID details and OTP for Aadhaar based login.
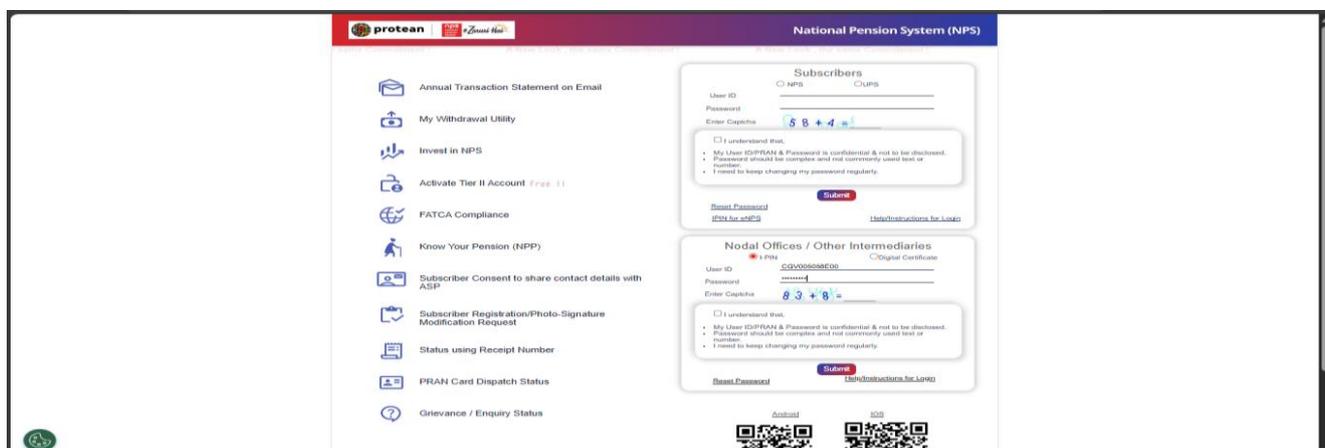

Figure 39

➢ Click on option **Subscribe maintenance** and sub menu **and sub menu "Update Name_DoB_DoR_DoJ" "***(Please refer Figure 40)*

Figure 40

➢ Click on the option **"Authorization"** and enter either PRAN or ACK ID details and click on submit button. The request pending for verification will appear on the screen *(Please refer Figure 41).*
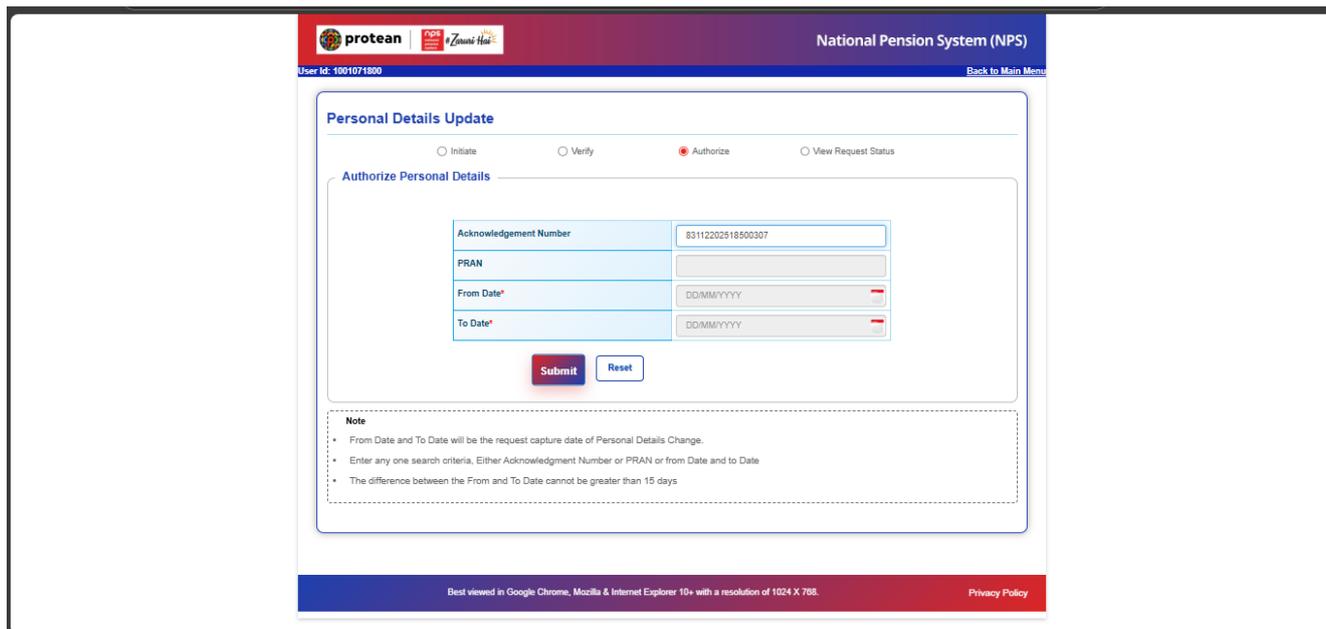
Figure 41

➢ Existing details pending for authorization will be available on screen. Click on hyperlink acknowledgement number to check the details entered by maker. (Please refer figure 42)

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Figure 42

It is the responsibility of the office to check veracity of documents as provided by the subscriber. Also, the office has to ensure that the details are updated in service record of the office. (The office needs to tick on the box confirming the same as mentioned above in figure 43).

The following details will appear on the screen here the user have to click on accept/reject need to put the Remarks and then click on approve or Back (Refer figure 43)

Figure 43

Nodal office can download and see document uploaded by maker to check the details entered. Click on "Confirm". (Please refer Figure 44/45)

Figure 44

Figure 45

➢ Status of request can be seen in CRA log in. *(Please refer Figure 46/47).*
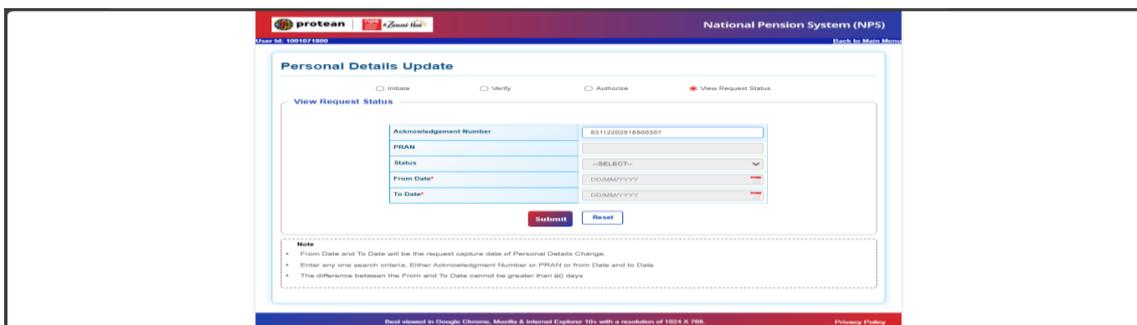
Figure 46
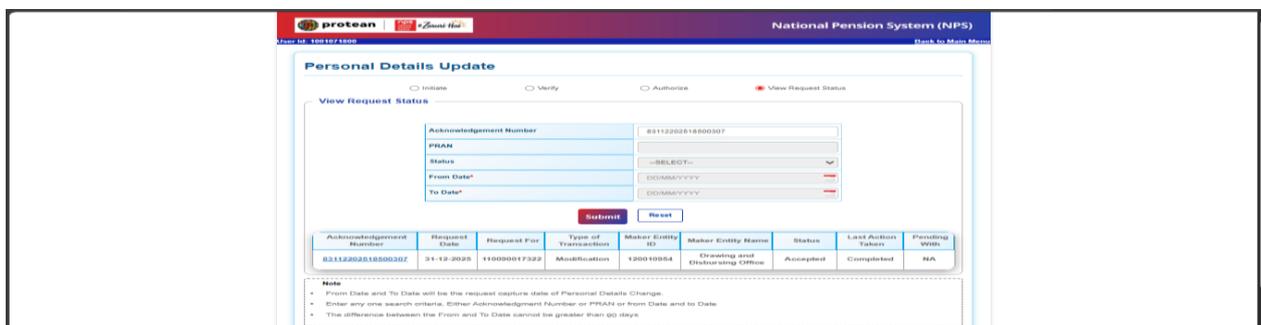
Figure 47

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3. Modification in Date of Joining (DoJ)

Date of Joining (DoJ) change request Initiated by PAO/DTO nodal office through user 1 can be authorized by PAO/DTO nodal office through User 2.
(In case request is initiated by DDO office, the same is to be verified by PAO/DTO office through user id one and authorised by PAO/DTO office through user id 2).

A. Change Request initiation by PAO/DTO nodal office

➢ PAO/DTO office will log in to CRA https://cra.nps-proteantech.in/CRA/. Enter **"User ID"** and password click on **"Submit"** *(Please refer Figure 1).* Enter Aadhaar ID details and OTP for Aadhaar based login. (Please refer Figure 48)

Figure 48

➢ Click on option **""Subscribe maintenance"** and sub menu **and sub menu "Update Name_DoB_DoR_DoJ"** *(Please refer Figure 49)*
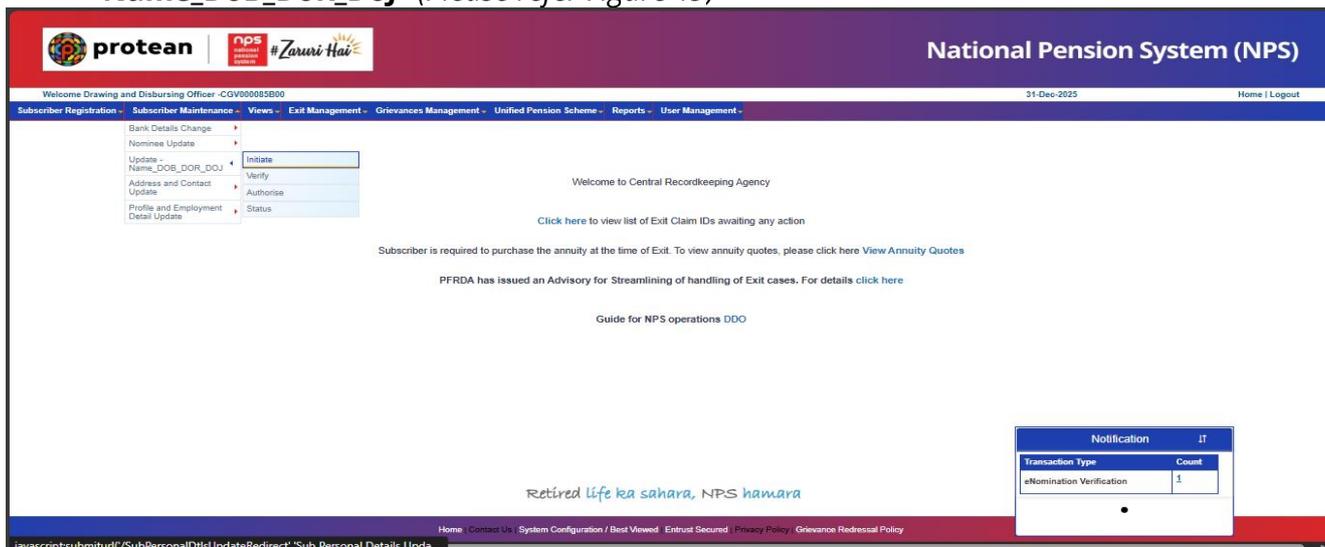
Figure 49

➢ Click on option **"Initiate"** and Enter PRAN. Click on **"Submit"** *(Please refer Figure 50)*
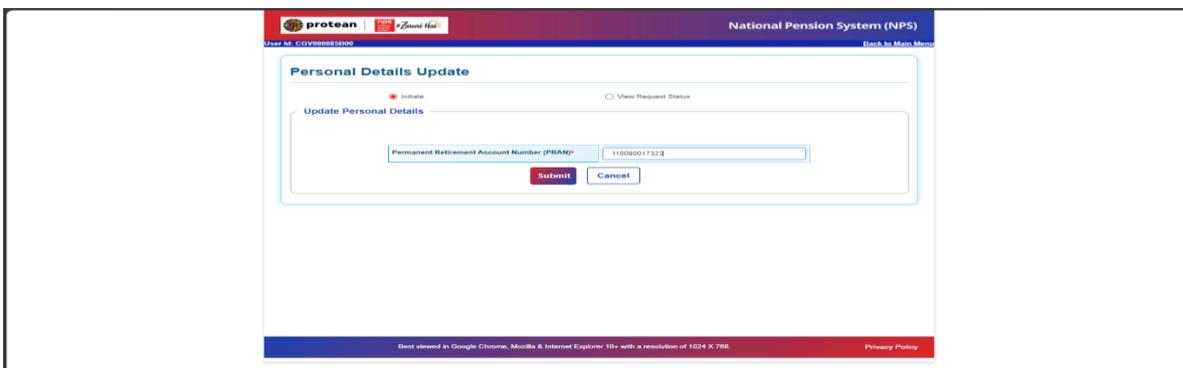
Figure 50

➢ Existing subscriber details available in CRA will be displayed on screen. The office needs to click on **Edit button** *(Please refer Figure 51)*
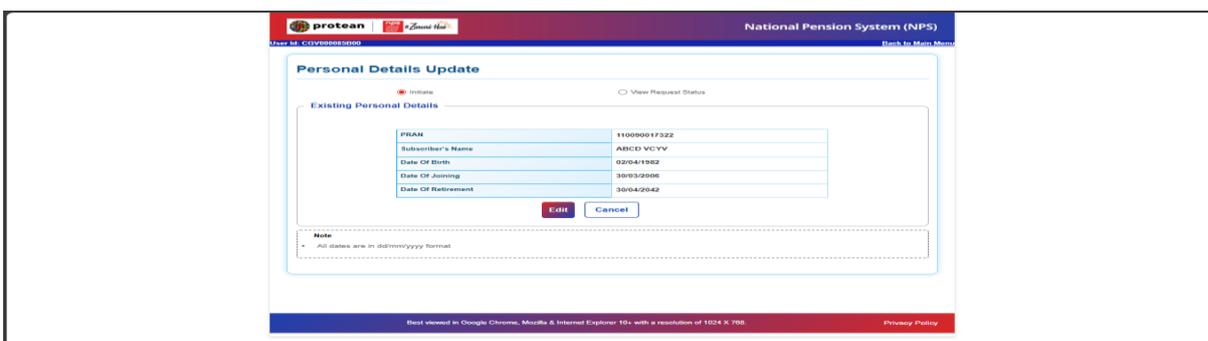
Figure 51

➢ Select the Change Type**, "Date of Joining" and** upload the supporting documents as a proof for Date of Joining. Tick on the declaration and click on **"Submit"** *(Please refer Figure 52).*
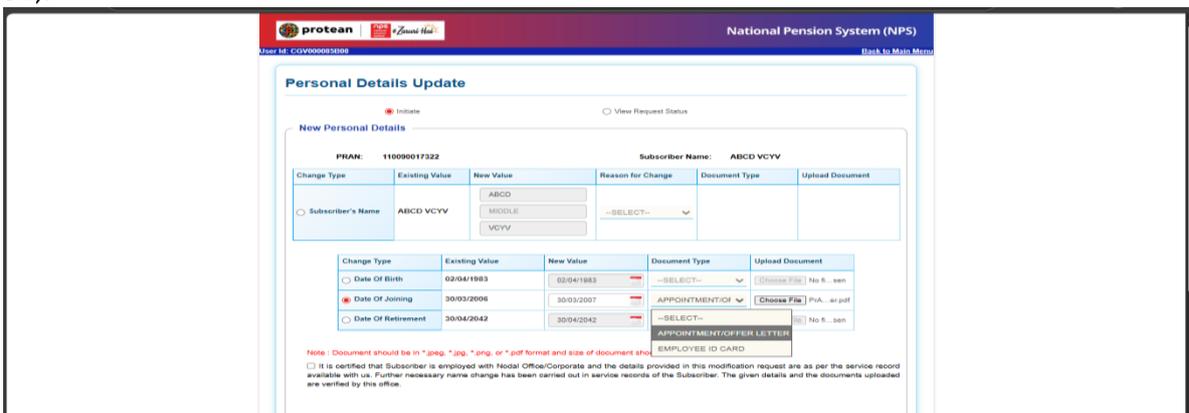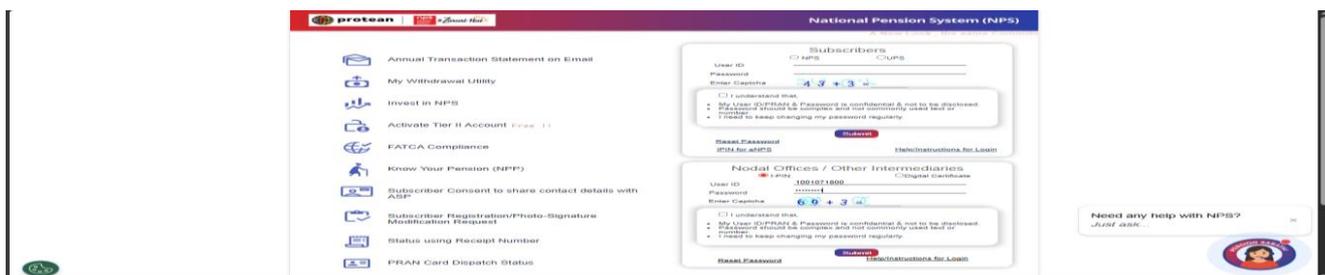

Figure 52

➢ Updated DoJ will be visible on screen click on "Confirm" to proceed. *(Please refer Figure 53).*
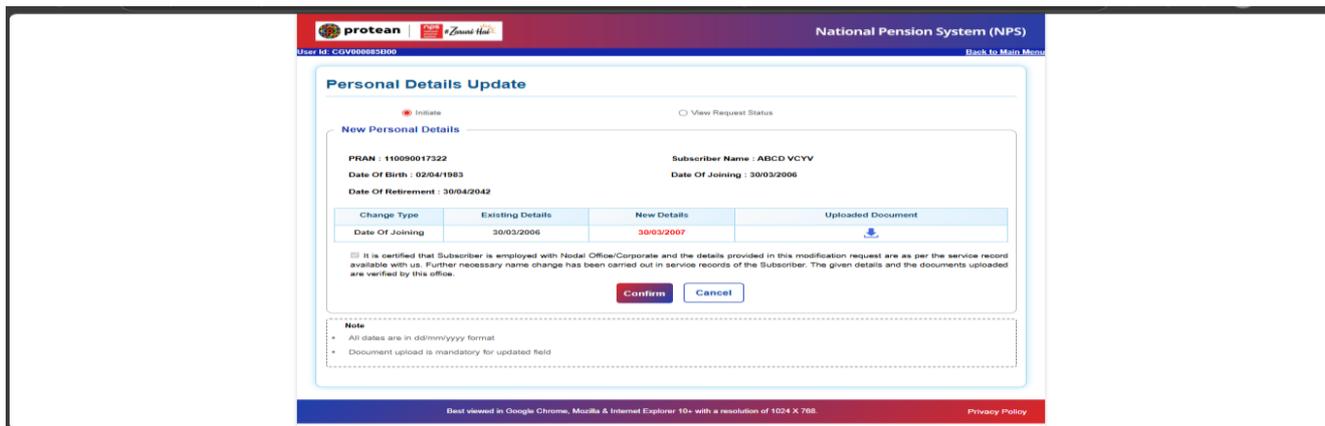
Figure 53

➢ Details will be saved successfully, and acknowledgement number (ACKID) will be visible on screen. *(Please refer to Figure 54).*
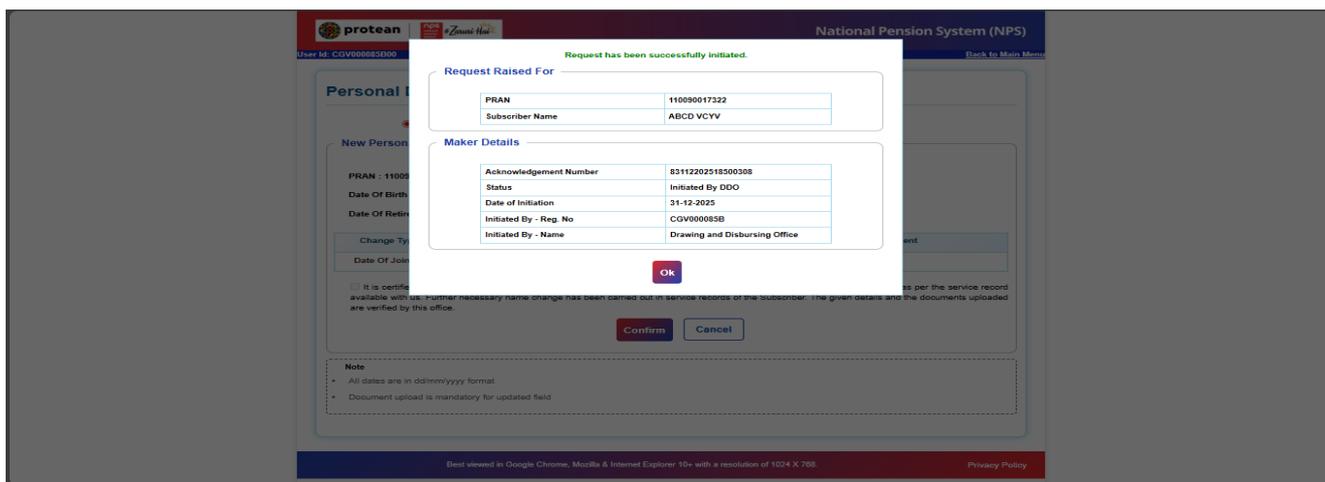
Figure 54

➢ Status of request can be seen in CRA log in. *(Please refer Figure 55).*
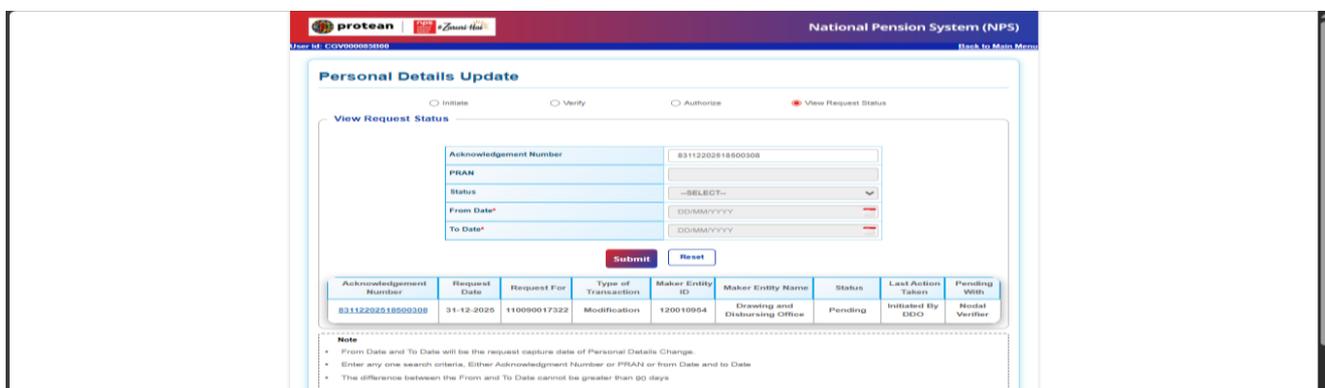
FIGURE 55

B. Authorization by PAO/DTO Office

Date of Joining (DoJ) change request Initiated by nodal office (PAO/DTO) needs to be authorized by PAO/DTO through another ID.

➢ PAO/DTO office will log in to CRA https://cra.nps-proteantech.in/CRA/. Enter **"User ID"** and password click on **"Submit"** *(Please refer Figure 1).* Enter Aadhaar ID details and OTP for Aadhaar based login. (Please refer Figure 56)

Figure 56

➢ Go to the option "Subscribe maintenance" and sub menu **sub menu "Update Name_DoB_DoR_DoJ" and click on authorise tab** *(Please refer Figure 57a).*

Figure 57a

➢ Enter PRAN/acknowledgement ID and click on "Submit."(refer figure 57b)
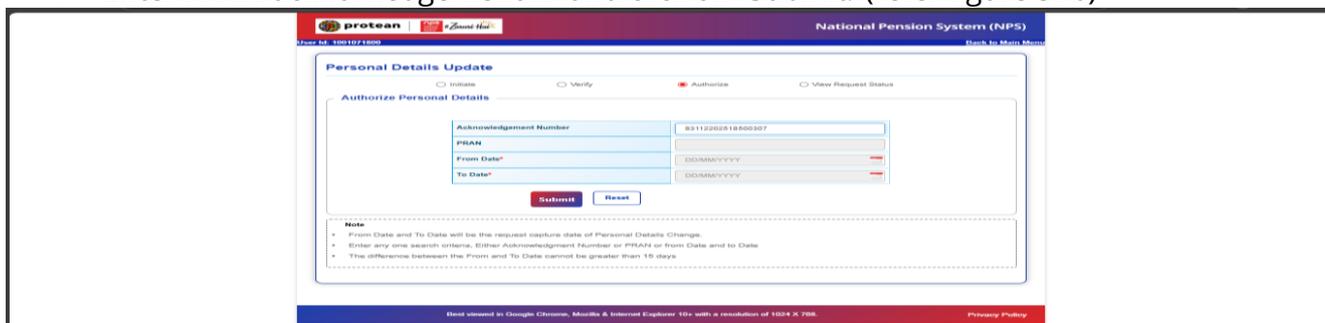
Figure 57b

➢ Existing details pending for authorization will be available on screen. Click on hyperlink **acknowledgement number** to check the details entered by maker. *(Please refer figure 58)*
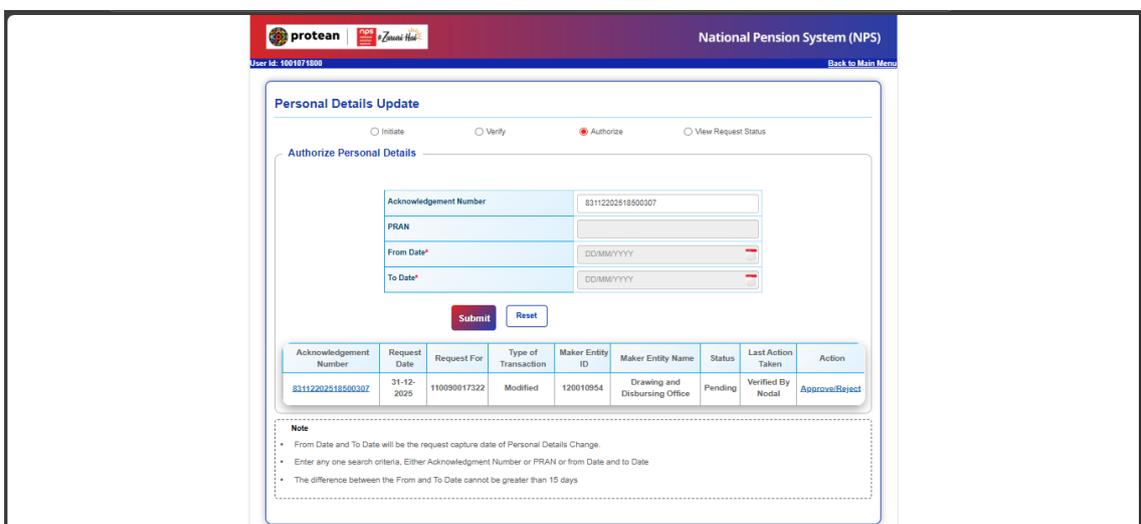
Figure 58

➢ The official needs to click on Approve/Reject hyperlink so that the changes made in date of joining will appear on the screen along with uploaded documents icon (refer figure 59).
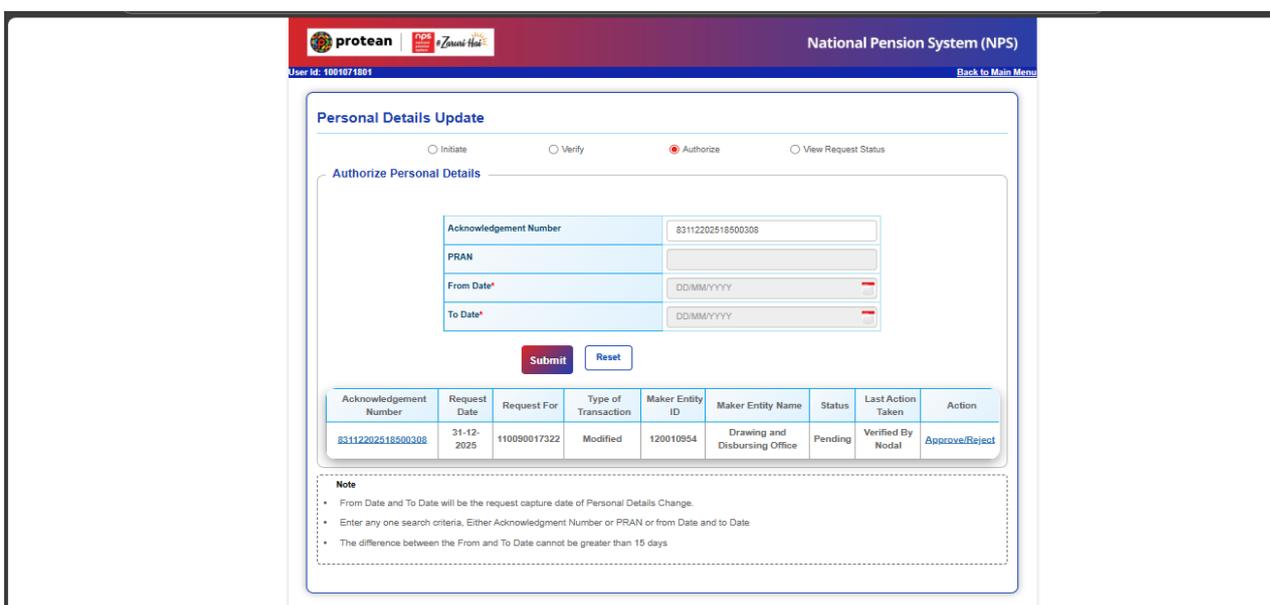
Figure 59

➢ PAO/DTO nodal office can Approve/Rejet the request based on details enterered and documents uploaded in CRA system. To see the upoded documents, click on **"Uploaded document"** icon.
Nodal office needs to download and check document as uploaded by the initiator. Click on **"accept/reject>put remarks and Approve"** and then confirm**.** *(Please refer Figure 60/61)*
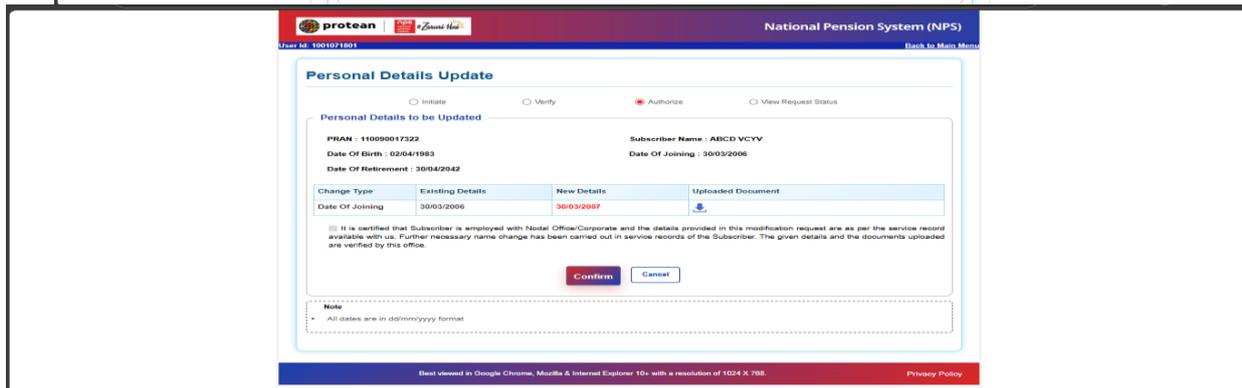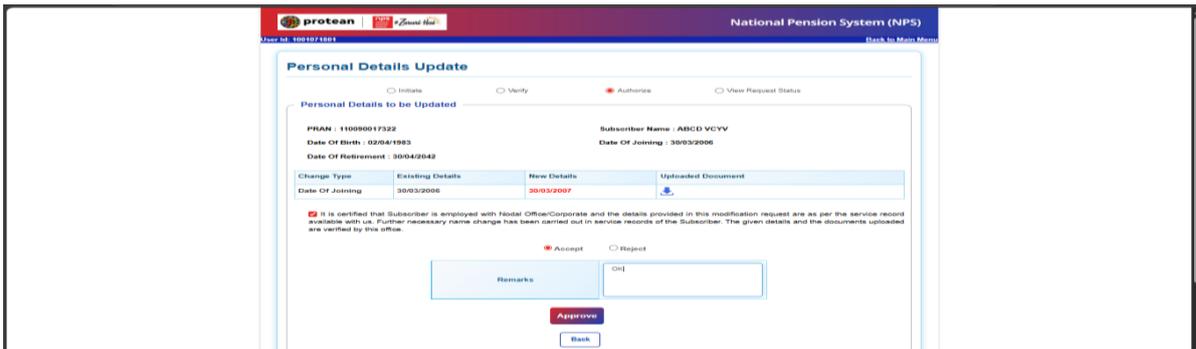
Figure 60/61

> ➢ Details will be saved successfully, and acknowledgement number will be visible on screen. Nodal office can check the status of the request. *(Please refer Figure 62/63).*
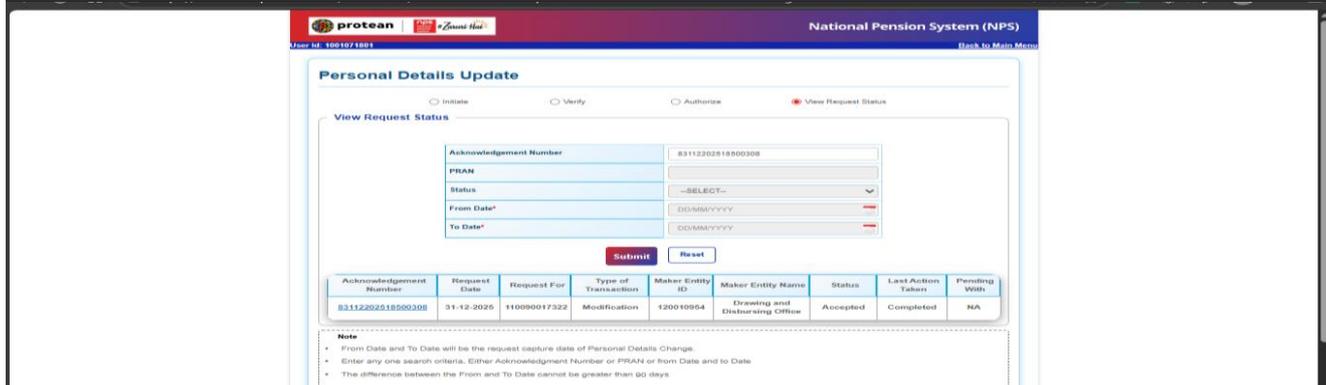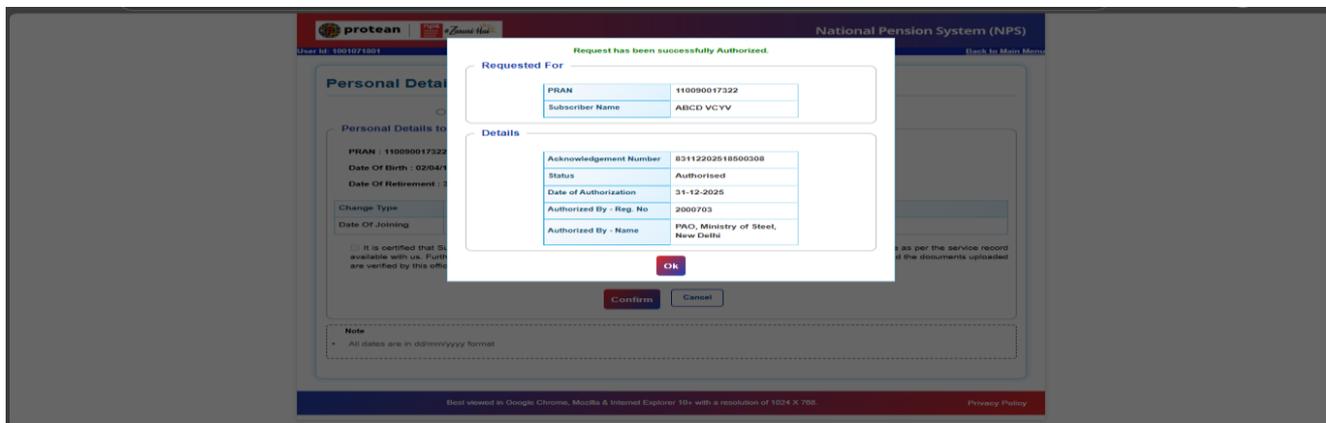
Figure 62/6

4. Modification in Date of Retirement:

Date of Retirement (DoR) change request Initiated by nodal office PAO/DTO through user ID 1 can be authorized by PAO/DTO nodal office User through user ID 2.
(In case request is initiated by DDO office, the same is to be verified by PAO/DTO office through user id one and authorised by PAO/DTO office through user id 2).

A. DoR Change Request Initiation by PAO/DTO

➤ DTO/PAO office will log in to CRA portal https://cra.nps-proteantech.in/CRA/ Enter **"User ID"** and password click on **"Submit"** *(Please refer Figure 64)*
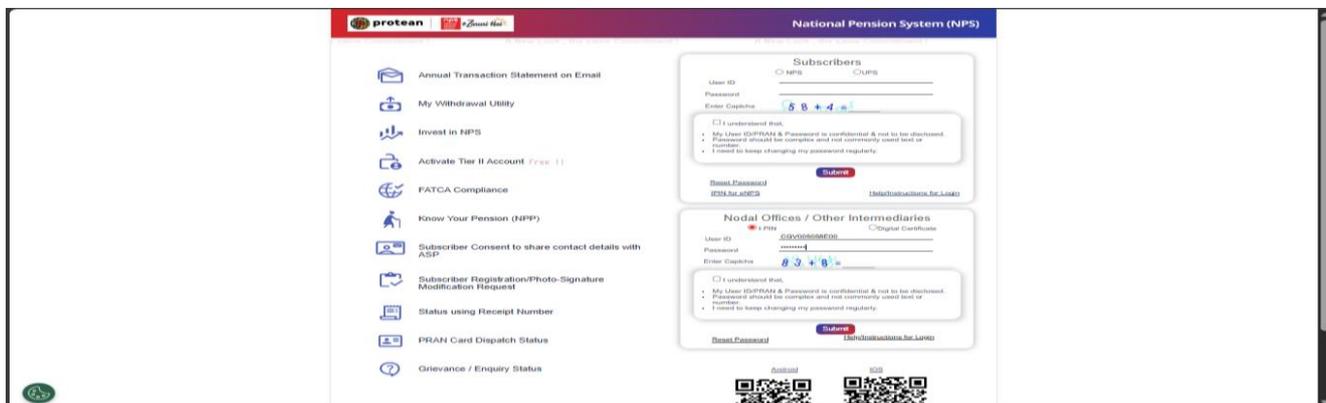
Figure 64

➤ Click on option **""Subscribe maintenance"** and sub menu **and sub menu " Update Name, dob,dor,doj,"** *(Please refer Figure 65)*
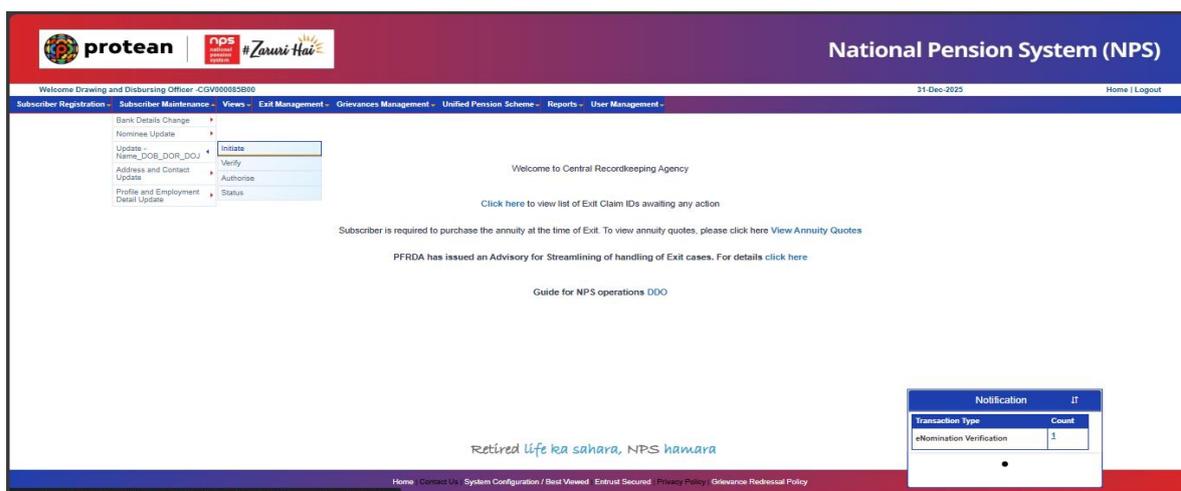
Figure: 65

➢ Click on option **"Initiate"** and Enter PRAN. Click on **"Submit"** *(Please refer Figure 66/67)*
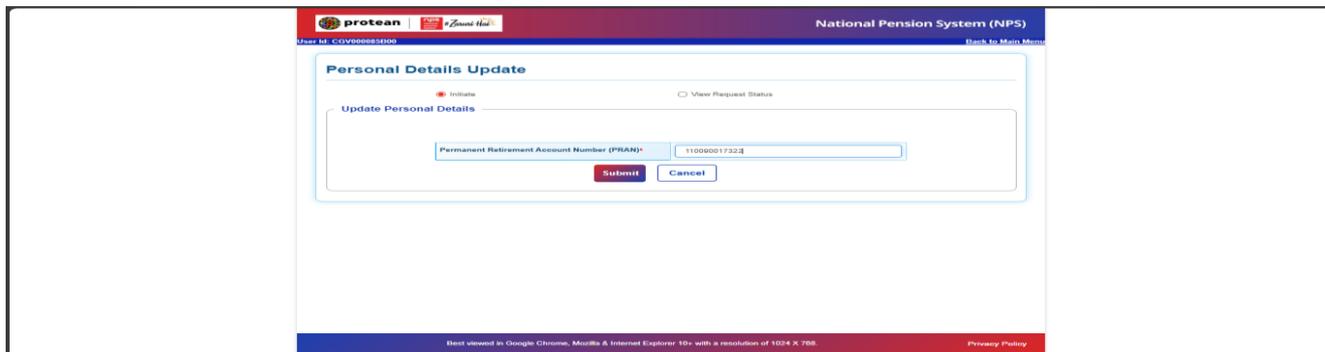
Figure 66

Then Click on **Edit :**
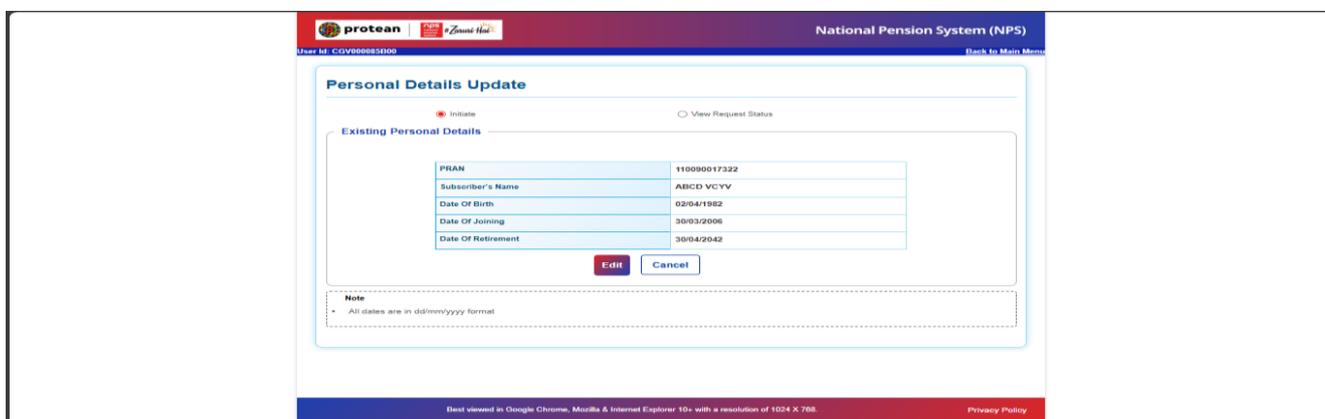
Figure: 67

➢ Select the Change Type**, "Date of Retirement".** Select supporting proof form available list and Upload document. Tick the declaration. Click on **"Submit"** *(Please refer Figure 68/69).*

Figure: 68

Figure: 69

➢ Updated DoR will be visible on screen click on "Confirm" to proceed. *(Please refer Figure70).*

Figure: 70

➢ Details will be saved successfully and acknowledgement number will be visible on screen than click on OK. *(Please refer Figure 71).*

Figure: 71

➢ Status of request can be seen in CRA log in. *(Please refer Figure 72).*

Figure: 72

4 (B). DoR Change Request Authorization by PAO/DTO.

Date of Birth (DoJ) change request Initiated by nodal office (PAO/DTO user 1) needs to be authorized by PAO/DTO user 2.

➢ DTO/PAO office will log in to CRA portal https://cra.nps-proteantech.in/CRA/ Enter **"User ID"** and password click on **"Submit"** *(Please refer Figure 73)*
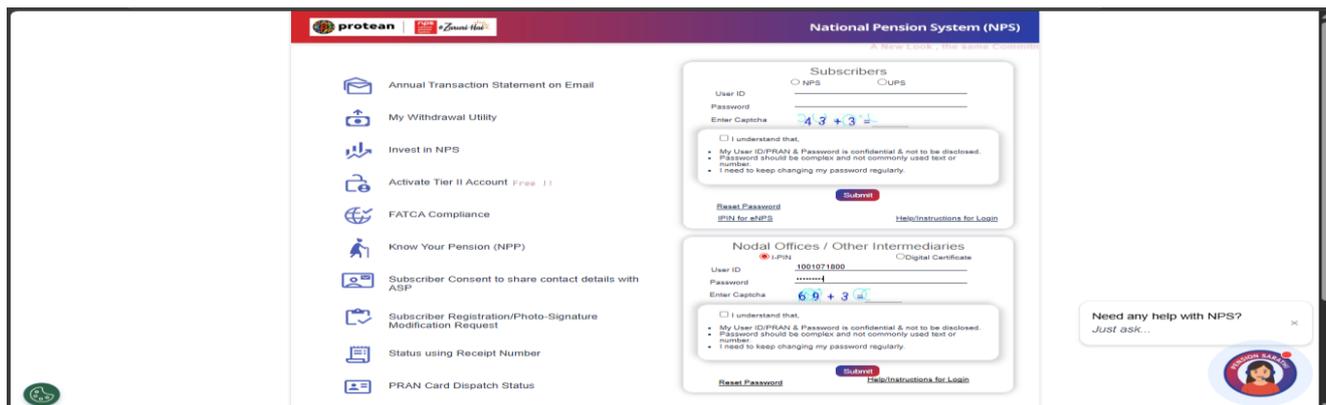

Figure: 73

➢ Click on option "Subscribe maintenance" and sub menu " Update Name, dob,dor,doj," "Authorise". Enter PRAN/acknowledgement ID. Click on "Submit." *(Please refer Figure 74).*
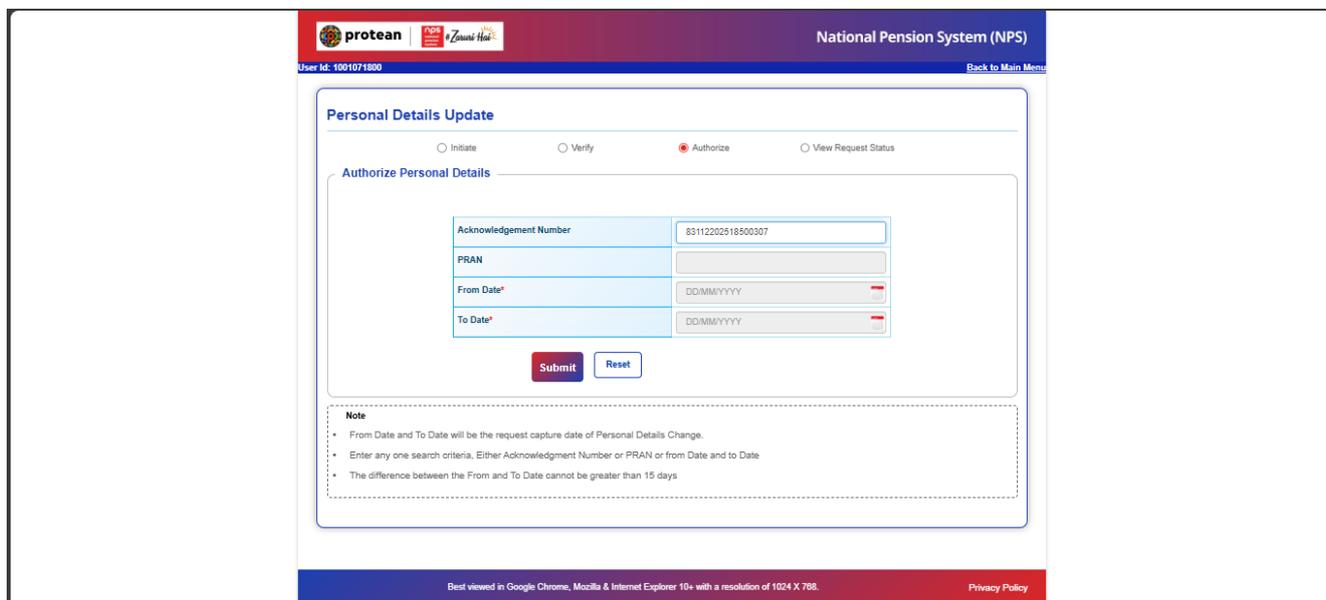

Figure: 74

➢ Click on option **"Authorize"**, enter PRAN details and click on **"Submit"** *(Please refer Figure 75)*
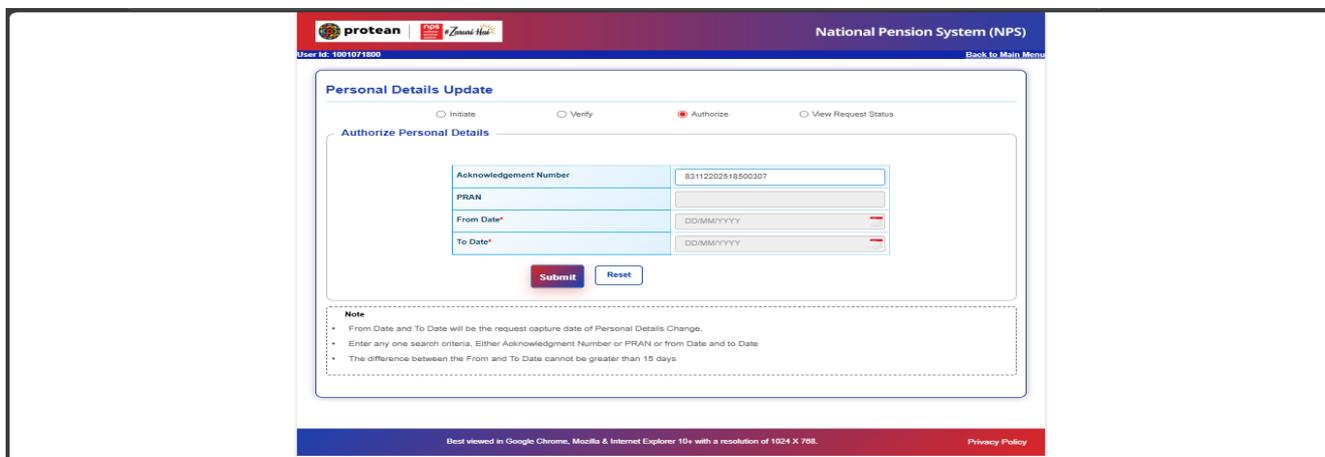

Figure: 75

➢ Existing details pending for authorization will be available on screen. Click on hyperlink **acknowledgement number** to check the details entered by maker. *(Please refer figure 76)*
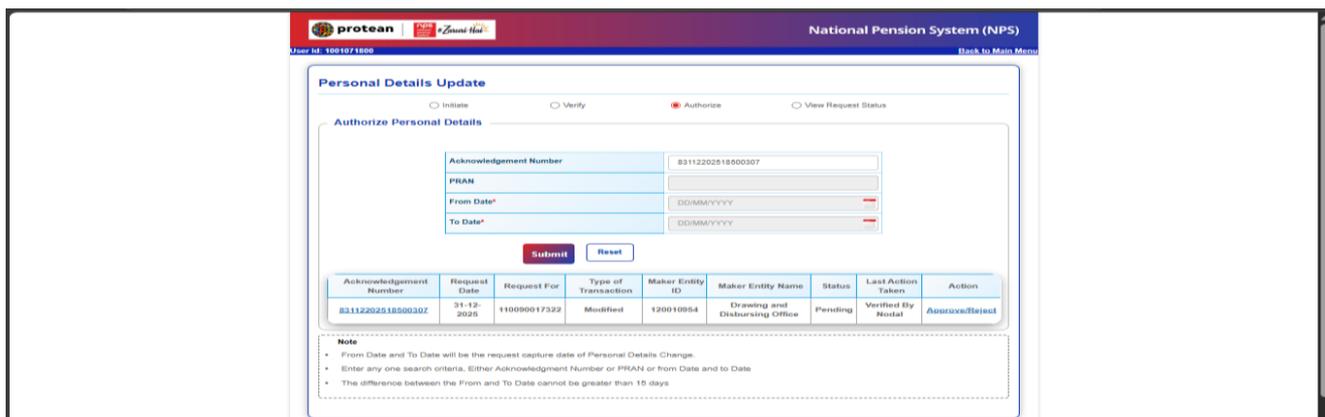

Figure: 76

➢ The following details will appear on the screen here the user have to click on accept/reject need to put the Remarks and then click on approve or Back (Refer figure 77)
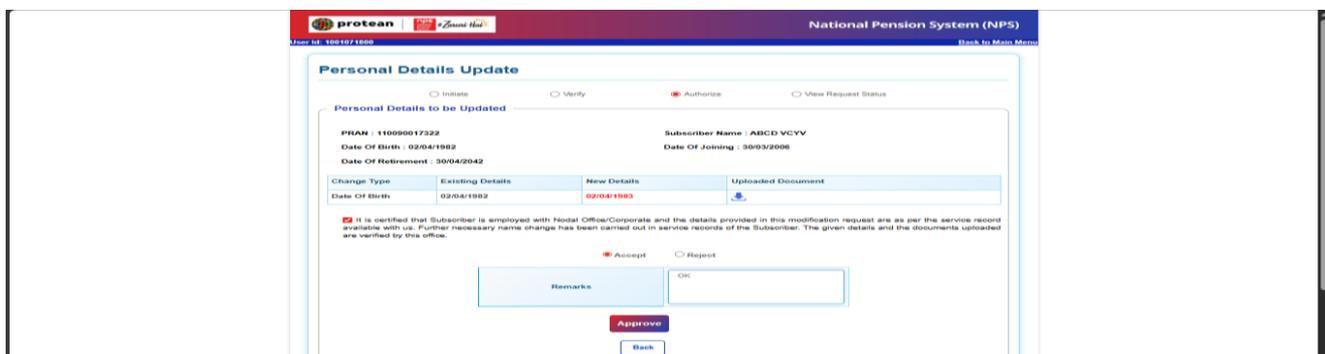

Figure: 77

➢ Nodal office can download and see document uploaded by maker to check the details entered. Click on **"Confirm".** *(Please refer Figure 78/79)*

Figure: 78

Figure: 79

➤ Status of request can be seen in CRA log in. *(Please refer Figure 80/81).*

Figure: 80/81

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