

Protean eGov Technologies Limited

Central Recordkeeping Agency



User Guide (Nodal Office Menu Realignment)

Protean CRA Portal for PrAO/DTA Users

Version Control Table

Version	Date	Addition/Changes in Section	Description of elaborated fields
1.0	30 th September 2025	-	Initial Draft

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Introduction

This guide has been created to help Nodal Offices to seamlessly navigate and use the revamped Nodal Office Login Menus. Along with the menu restructuring, we have also introduced a refreshed color theme for better readability and a cleaner look.

This manual provides references of revamped menus to help Users to adapt quickly to the updated system. Whether you are initiating transactions, generating reports, or managing user accounts, this guide will serve as your reference point.

Objective of the Revamp

The primary objective of the Nodal Office Login revamp is to enhance ease of use and make daily activities more efficient for Nodal Office Users.

Key goals include:

- Simplify Navigation – Logical, task-based grouping of menu items.
- Improve Efficiency – Faster access to commonly used functions.
- Enhance Visual Comfort – With a refreshed color scheme that improves readability and user experience while keeping the interface familiar.

These changes make the Nodal Office login simpler, cleaner, and more user-friendly, while retaining the same familiar functionality. The process flows remain unchanged, ensuring that stakeholders can continue their tasks without any disruption.

Role Access Control

The functionalities and features described in this User Guide are accessible to nodal offices based on their role access mapping within the CRA system. Since access varies by Role ID, some features detailed here may not be visible to your office.

Subscriber Registration

Sr. No.	Functionalities under Subscriber Registration	Purpose
1.	Online Registration by Subscriber	To verify, authorise and check the status of the subscriber registration request initiated through e-NPS
2.	Bulk Registration by Nodal Office (File Upload)	To initiate the bulk subscriber registrations process by Nodal Office
3.	Online Registration by Nodal Office	To initiate screen-based subscriber registration process made by the Nodal Office
4.	Tier II Activation	To initiate, authorise and check the status of Tier II activation by the Nodal Office
5.	Subscriber Reactivation/Deactivation (File Upload)	To reactive/deactivate PRAN status
6.	CCS 2004: Form I & Form II submission	To initiate the request for Central Civil Services employees covered under the 2004 scheme

Screen – SR1

Welcome Principal Accounts Office-111012100 26-Sep-2025 Home | Logout

Subscriber Registration ▾ Subscriber Maintenance ▾ Nodal Office Management ▾ Views ▾ ERM Transactions ▾ Exit Management ▾ Grievances Management ▾ Reports ▾ User Management ▾

Online Registration by Subscriber ▾ Verify and Authorise
Bulk Registration by Nodal Office (File Upload) ▾ Status
Online Registration by Nodal Office ▾
Tier II Activation ▾
Subscriber Reactivation/Deactivation (File Upload) ▾
CCS 2021: Form I & Form II submission

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

Subscriber is required to purchase the annuity at the time of Exit. To view annuity quotes, please click here [View Annuity Quotes](#)

[Click here](#) for details related to 'Voluntary Contribution in Tier I account by Govt. Sector Subscribers'

Information regarding online submission of FATCA Self-Certification in Subscribers login may be disseminated to your Subscribers. For details, [Click here](#)

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Nodal Offices Helpline No 1800-222-081

Retired life ka sahara, NPS hamara

Screen – SR2

Welcome Principal Accounts Office-111012100 26-Sep-2025 Home | Logout

Subscriber Registration ▾ Subscriber Maintenance ▾ Nodal Office Management ▾ Views ▾ ERM Transactions ▾ Exit Management ▾ Grievances Management ▾ Reports ▾ User Management ▾

Online Registration by Subscriber ▾
Bulk Registration by Nodal Office (File Upload) ▾ Status
Online Registration by Nodal Office ▾ Initiate
Tier II Activation ▾
Subscriber Reactivation/Deactivation (File Upload) ▾
CCS 2021: Form I & Form II submission

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Screen – SR3

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Subscriber RegistrationSubscriber MaintenanceNodal Office ManagementViewsERM TransactionsExit ManagementGrievances ManagementReportsUser Management

Online Registration by SubscriberBulk Registration by Nodal Office (File Upload)Online Registration by Nodal OfficeTier II ActivationSubscriber Reactivation/Deactivation (File Upload)CCS 2021: Form I & Form II submission

InitiateVerifyStatus

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Screen – SR4

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Online Registration by SubscriberBulk Registration by Nodal Office (File Upload)Online Registration by Nodal OfficeTier II ActivationSubscriber Reactivation/Deactivation (File Upload)CCS 2021: Form I & Form II submission

InitiateAuthoriseStatus

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Nodal Offices Helpline No 1800-222-081

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Screen – SR5

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InitiateStatus

Welcome to Central Recordkeeping Agency

Click here to view list of Exit Claim IDs awaiting any action

Subscriber is required to purchase the annuity at the time of Exit. To view annuity quotes, please click here View Annuity Quotes

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Nodal Offices Helpline No 1800-222-081

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Screen – SR6

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Bulk Registration by Nodal Office (File Upload)
Online Registration by Nodal Office
Tier II Activation
Subscriber Reactivation/Deactivation (File Upload)
CCS 2021: Form I & Form II submission

Welcome to Central Recordkeeping Agency

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

Subscriber is required to purchase the annuity at the time of Exit. To view annuity quotes, please click here [View Annuity Quotes](#)

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Nodal Offices Helpline No 1800-222-081

Retired *life ka sahara*, NPS *hamara*

Subscriber Maintenance

Sr. No.	Functionalities under Subscriber Registration	Purpose
1	One Way Switch (Tier II to I)	To initiate, authorise and check the status of switch request from Tier II to Tier I account.
2	Tier-II Details Update	To initiate, authorise, and check the status of Tier-II account details modification.
3	Shifting Request	To initiate, verify and authorise inter sector shifting request.
4	FATCA Certification	To provide Screen Based assistance, File Upload options, and Status view of FATCA (Foreign Account Tax Compliance Act) certification/declaration
5	Photo Signature Upload	To initiate, authorise and check the status of subscriber's photographs and signatures update
6	Bank Details Update	To initiate, authorise and check the status of subscriber's bank details update
7	Nominee Details Update	To initiate, authorise and check the status of subscriber's nominee details update
8	Update-Name_DOB_DOR_DOJ	To initiate, verify, authorise and check the status of subscriber's personal details i.e. Name, DOB & DOJ.
9	Update - Other Details	To authorize and view status of other financial and non-financial transactions details
10	Subscriber Maintenance - File Based	To initiate and check the status of uploaded subscriber maintenance file.
11	Scheme Preference Change	To authorise and status scheme preference change

Screen – SM1

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Subscriber RegistrationSubscriber MaintenanceNodal Office ManagementViewsERM TransactionsExit ManagementGrievances ManagementReportsUser Management

One Way Switch (Tier II to I)Initiate

Tier-II Details UpdateAuthorise

Shifting RequestStatus

FATCA Certification

Photo Signature UploadWelcome to Central Recordkeeping Agency

Bank Details Change

Nominee Details UpdateClick here to view list of Exit Claim IDs awaiting any action

Update - Name_DOB_DOR_DOJ

Update - Other DetailsInured to purchase the annuity at the time of Exit. To view annuity quotes, please click here View Annuity Quotes

Subscriber Maintenance - File Based

Scheme Preference Changehere for details related to 'Voluntary Contribution in Tier I account by Govt. Sector Subscribers'

Information regarding online submission of FATCA Self-Certification in Subscribers login may be disseminated to your Subscribers. For details, Click here

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Screen – SM2

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One Way Switch (Tier II to I)

Tier-II Details UpdateInitiate

Shifting RequestAuthorise

FATCA CertificationStatus

Photo Signature UploadWelcome to Central Recordkeeping Agency

Bank Details Change

Nominee Details UpdateClick here to view list of Exit Claim IDs awaiting any action

Update - Name_DOB_DOR_DOJ

Update - Other DetailsInured to purchase the annuity at the time of Exit. To view annuity quotes, please click here View Annuity Quotes

Subscriber Maintenance - File Based

Scheme Preference Changehere for details related to 'Voluntary Contribution in Tier I account by Govt. Sector Subscribers'

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Screen – SM3

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One Way Switch (Tier II to I)

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Shifting RequestInitiate

FATCA CertificationAuthorise

Photo Signature UploadAuthorize Inter Subscriber Shifting by Source

Bank Details ChangeVerify Subscriber Shifting

Nominee Details UpdateClick here to view list of Exit Claim IDs awaiting any action

Update - Name_DOB_DOR_DOJStatus

Update - Other DetailsInured to purchase the annuity at the time of Exit. To view annuity quotes, please click here View Annuity Quotes

Subscriber Maintenance - File Based

Scheme Preference Changehere for details related to 'Voluntary Contribution in Tier I account by Govt. Sector Subscribers'

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Screen BasedFile UploadStatus

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Click here to view list of Exit Claim IDs awaiting any action

To view annuity quotes, please click here [View Annuity Quotes](#)

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InitiateAuthorizeStatus

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w list of Exit Claim IDs awaiting any action

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InitiateAuthoriseStatus

Welcome to Central Recordkeeping Agency

w list of Exit Claim IDs awaiting any action

To view annuity quotes, please click here [View Annuity Quotes](#)

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Update - Name_DOB_DOR_DOJ

Update - Other Details

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Welcome to Central Recordkeeping Agency

Click here to view list of Exit Claim IDs awaiting any action

time of Exit. To view annuity quotes, please click here [View Annuity Quotes](#)

ary Contribution in Tier I account by Govt. Sector Subscribers'

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Update - Name_DOB_DOR_DOJ

Update - Other Details

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Click here to view list of Exit Claim IDs awaiting any action

time of Exit. To view annuity quotes, please click here [View Annuity Quotes](#)

ary Contribution in Tier I account by Govt. Sector Subscribers'

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Nominee Details Update

Update - Name_DOB_DOR_DOJ

Update - Other Details

Subscriber Maintenance - File Based

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Welcome to Central Recordkeeping Agency

Click here to view list of Exit Claim IDs awaiting any action

time of Exit. To view annuity quotes, please click here [View Annuity Quotes](#)

ary Contribution in Tier I account by Govt. Sector Subscribers'

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Nodal Offices Helpline No 1800-222-081

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Screen – SM10

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Bank Details Change

Nominee Details Update

Update - Name_DOB_DOR_DOJ

Update - Other Details

Subscriber Maintenance - File Based

Scheme Preference Change

Initiate

Status

Welcome to Central Recordkeeping Agency

Click here to view list of Exit Claim IDs awaiting any action

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Nominee Details Update

Update - Name_DOB_DOR_DOJ

Update - Other Details

Subscriber Maintenance - File Based

Scheme Preference Change

Initiate

Status

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Nodal Offices Helpline No 1800-222-081

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Nodal Office Management

SR. No.	Functionalities under Nodal Office Management	Purpose
1.	DDO Shifting Request	To initiate, verify requests for shifting Drawing and Disbursing Officer (DDO) assignments, and check their status.
2.	Nodal office Bank Details Change	To initiate, authorize and check the status of the updates to banking information for nodal offices.
3.	DDO Registration and Modification	Handles registration of new DDOs and modifications to existing DDO details.
4.	Recruitment Details	To capture and view the recruitment-related information and processes.
5.	Request for Training Session	Allows nodal offices to request training sessions for staff or subscribers.
6.	View of Circular / SOP	Provides access to important circulars and Standard Operating Procedures.
7.	Aadhaar Linking	To map, disassociation and view status of Aadhaar Linking of User

Screen – NOM1

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Status

Recruitment Details ▾

Request for Training Session

View of Circular / SOP

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Screen – NOM3

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View

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Nodal Offices Helpline No 1800-222-081

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Screen – NOM4

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DDO Shifting Request

Nodal office Bank Details Change

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Nodal Offices Helpline No 1800-222-081

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Screen – NOM5

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Subscriber Registration ▾ Subscriber Maintenance ▾ Nodal Office Management ▾ Views ▾ ERM Transactions ▾ Exit Management ▾ Grievances Management ▾ Reports ▾ User Management ▾

DDO Shifting Request ▸
 Nodal office Bank Details Change ▸
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 Request for Training Session ▸
 View of Circular / SOP

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Nodal Offices Helpline No 1800-222-081

Retired life ka sahara, NPS hamara

\\naucrcinb\cuhm\hull\DownloadTrainingModule\Download Circular / SOP1

Screen – NOM6

Welcome Principal Accounts Office-111001400 01-Oct-2025 Home | Logout

Subscriber Registration ▾ Subscriber Maintenance ▾ Nodal Office Management ▾ Views ▾ ERM Transactions ▾ Exit Management ▾ Grievances Management ▾ Reports ▾ User Management ▾

DDO Shifting Request ▸
 Nodal office Bank Details Change ▸
 Recruitment Details ▸
 Request for Training Session ▸
 View of Circular / SOP
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Authorise
 Disassociation
 Status

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

Subscriber is required to purchase the annuity at the time of Exit. To view annuity quotes, please click here [View Annuity Quotes](#)

[Click here](#) for details related to 'Voluntary Contribution in Tier I account by Govt. Sector Subscribers'

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NPS Operations Guide [PrAO/DTA PAO/DTO DDO](#)

Nodal Offices Helpline No 1800-222-081

Views

SR No	Functionalities under View	Purpose
1.	Nodal Office	To view pending contribution file and nodal office details.
2.	Subscriber	To view subscriber's voluntary contribution statement, NPS account info, retirement details and ePRAN

Screen – VW1

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Subscriber Registration ▾ Subscriber Maintenance ▾ Nodal Office Management ▾ Views ▾ ERM Transactions ▾ Exit Management ▾ Grievances Management ▾ Reports ▾ User Management ▾

Nodal Office ▾ Contribution File Pending for Match

Subscriber ▾ PAO Performance

PrAO Details

PAO Details

DDO Details

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Retired life ka sahara, NPS hamara

Screen – VW2

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Nodal Office ▾

Subscriber ▾ Voluntary Contribution Statement

e-PRAN

NPS A/C Details View

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Nodal Offices Helpline No 1800-222-081

Retired life ka sahara, NPS hamara

ERM Transactions

SR No	Functionalities under ERM Transaction	Purpose
1.	Excess Transfer to Trustee Bank	To initiate, verify and authorize the rectification request of Excess Transfer to Trustee Bank
2.	Erroneous Transfer to Subscriber	To initiate, verify and authorize rectification request of Erroneous Transfer to subscriber
3.	Redeem Non-NPS Funds	To initiate, verify and authorize the redemption request of non NPS Contribution
4.	View Request Status	To view request status of above requests

Screen – ERM1

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Excess Transfer to Trustee Bank

Authorise

Erroneous Transfer to Subscriber

Redeem Non-NPS Funds

View Request Status

Withdrawal to Central Recordkeeping Agency

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

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Retired *life ka sahara*, NPS *hamara*

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Excess Transfer to Trustee Bank

Erroneous Transfer to Subscriber

Redeem Non-NPS Funds

View Request Status

Initiate

Verify

Authorise

Click here to view list of Exit Claim IDs awaiting any action

Subscriber is required to purchase the annuity at the time of Exit. To view annuity quotes, please click here [View Annuity Quotes](#)

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Erroneous Transfer to Subscriber

Redeem Non-NPS Funds

View Request Status

Initiate

Verify

Authorise

Click here to view list of Exit Claim IDs awaiting any action

Subscriber is required to purchase the annuity at the time of Exit. To view annuity quotes, please click here [View Annuity Quotes](#)

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Screen – ERM4

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Excess Transfer to Trustee Bank

Erroneous Transfer to Subscriber

Redeem Non-NPS Funds

View Request Status

Initiate

Verify

Authorise

Click here to view list of Exit Claim IDs awaiting any action

Subscriber is required to purchase the annuity at the time of Exit. To view annuity quotes, please click here [View Annuity Quotes](#)

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Nodal Offices Helpline No 1800-222-081

Retired life ka sahara, NPS hamara

Exit Management

SR No	Functionalities under Exit Management	Purpose
1	Claim ID	To initiate, authorize, track the status of Claim ID request and extract reports
2	Superannuation / Premature/ Incapacitation	To initiate, verify and authorize withdrawal requests of all 3 exist conditions
3	Partial (Conditional)	To initiate, verify, authorize, and provide status check regarding conditional exit scenarios with specific criteria.
4	Family/Disability Pension	To initiate, authorize and check the status for pension claims for family members and handling disability pension applications.
5	Deferment	To initiate, verify, authorize, and check the status related to deferment in pension withdrawal.
6	Death	To initiate, verify, authorize, and check the status of the post-death claim processes for nominees or family members

Screen – EM1

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SA / PE / Incapacitation
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Family/Disability Pension
Deferment
Death

Initiate - Generation/Cancellation
Authorise - Generation/Cancellation
Status
Report

Welcome to Central

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

Subscriber is required to purchase the annuity at the time of Exit. To view annuity quotes, please click here [View Annuity Quotes](#)

[Click here](#) for details related to 'Voluntary Contribution in Tier I account by Govt. Sector Subscribers'

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SA / PE / Incapacitation

Conditional

Family/Disability Pension

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Initiate

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Subscriber is required to purchase the annuity at the time of Exit. To view annuity quotes, please click here [View Annuity Quotes](#)

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Family/Disability Pension

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Subscriber is required to purchase the annuity at the time of Exit. To view annuity quotes, please click here [View Annuity Quotes](#)

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SA / PE / Incapacitation

Conditional

Family/Disability Pension

Deferment

Death

Initiate

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Welcome to Central

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

Subscriber is required to purchase the annuity at the time of Exit. To view annuity quotes, please click here [View Annuity Quotes](#)

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Subscriber is required to purchase the annuity at the time of Exit. To view annuity quotes, please click here [View Annuity Quotes](#)

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Nodal Offices Helpline No 1800-222-081

Retired life ka sahara, NPS hamara

Claim ID	▶
SA / PE / Incapacitation	▶
Conditional	▶
Family/Disability Pension	▶
Deferment	◀
Death	▶

Initiate
Verify
Authorise
Status

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Welcome to Central

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

Subscriber is required to purchase the annuity at the time of Exit. To view annuity quotes, please click here [View Annuity Quotes](#)

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Retired life ka sahara, NPS hamara

Claim ID	▶
SA / PE / Incapacitation	▶
Conditional	▶
Family/Disability Pension	▶
Deferment	▶
Death	◀

Initiate
Verify and Authorise
Status

Grievances Management

SR No	Sub Modules	Purpose
1.	Grievance	To Initiate, resolve, check status and provide feedback to CRA against grievance raised by subscriber
2.	Download Modified Grievance List	To download modifies grievance list
3.	Download Uploaded Grievance File	To download uploaded grievance file of feedback/resolution
4.	CGMS Backoffice	To view the status of uploaded file on Central Grievance Management System backend

Screen – GM1

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Download Uploaded Grievance File

Resolve

Status

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

Subscriber is required to purchase the annuity at the time of Exit. To view annuity quotes, please click here [View Annuity Quotes](#)

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Download Uploaded Grievance File

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File Status

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Reports

SR No	Functionalities under Reports	Purpose
1	Token Based Reports	To request, view and download for contributions comparison report
2	Dashboard	To offers consolidated view of account information and to download exception and manual reports
3	Subscriber Shifting List	To view and download subscriber shifting list
4	CRA Service Charges	To view and download Central Recordkeeping Agency (CRA) service charges
5	Exception Report - PAO perf.	To provide exceptions reports

Screen – RP1

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Status & Download

Request for Contributions Compa

Request for Subscriber Contributi

Pending Match Files

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Dashboard Reports/View

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Download-Credit Analysis

Exception Report

ERM Dashboard Report

Manual MIS Report

Executive Summary

Welcome to Central Recordkeeping Agency

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Subscriber is required to purchase the annuity at the time of Exit. To view annuity quotes, please click here [View Annuity Quotes](#)

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Subscriber is required to purchase the annuity at the time of Exit. To view annuity quotes, please click here [View Annuity Quotes](#)

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Subscriber is required to purchase the annuity at the time of Exit. To view annuity quotes, please click here [View Annuity Quotes](#)

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Nodal Offices Helpline No 1800-222-081

Retired life ka sahara, NPS hamara

User Management

SR No	Functionalities under User Management	Purpose
1	Change Password	To change password
2	Update Security Question	To update Security Question
3	Re-Issue of I-PIN/T-PIN	To Re-Issue of I-PIN/T-PIN
4	Reset I-PIN	To reset I-PIN

Screen - UM1

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Reset I-PIN

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Nodal Offices Helpline No 1800-222-061

Retired life ka sahara, NPS hamara

Screen – UM2

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Change Password

Update Security Question

Re-Issue of I-PIN/T-PIN

Reset I-PIN

Aadhaar Linking

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Subscriber is required to purchase the annuity at the time of Exit. To view annuity quotes, please click here [View Annuity Quotes](#)

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Aadhaar Linking

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Authorize

Status

Welcome to Central Recordkeeping Agency

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Subscriber is required to purchase the annuity at the time of Exit. To view annuity quotes, please click here [View Annuity Quotes](#)

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Information regarding online submission of FATCA Self-Certification in Subscribers login may be disseminated to your Subscribers. For details, [Click here](#)

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Nodal Offices Helpline No 1800-222-061

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