Protean eGov Technologies Limited

STANDARD OPERATING PROCEDURE (SoP)

Change in Subscriber's Personal (CORE) Details by Nodal Office

Version 1.3

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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 requiring 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)

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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 scanned 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 concern 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 its 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 type of subscriber details in CRA.

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

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

The Matrix for 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	CRA (User 1)	CRA (User 2)
PAO/DTO	-	PrAO/DTA	CRA (User 1)	CRA (User 2)
PrAO/DTA (User 1)	-	PrAO/DTA (User 2)	CRA (User 1)	CRA (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 needs to be authorised within 15 days of initiation otherwise the same 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 portal https://cra-nsdl.com/CRA/. Enter **"User ID"** and password click on **"Submit"** *(Please refer Figure 1)*

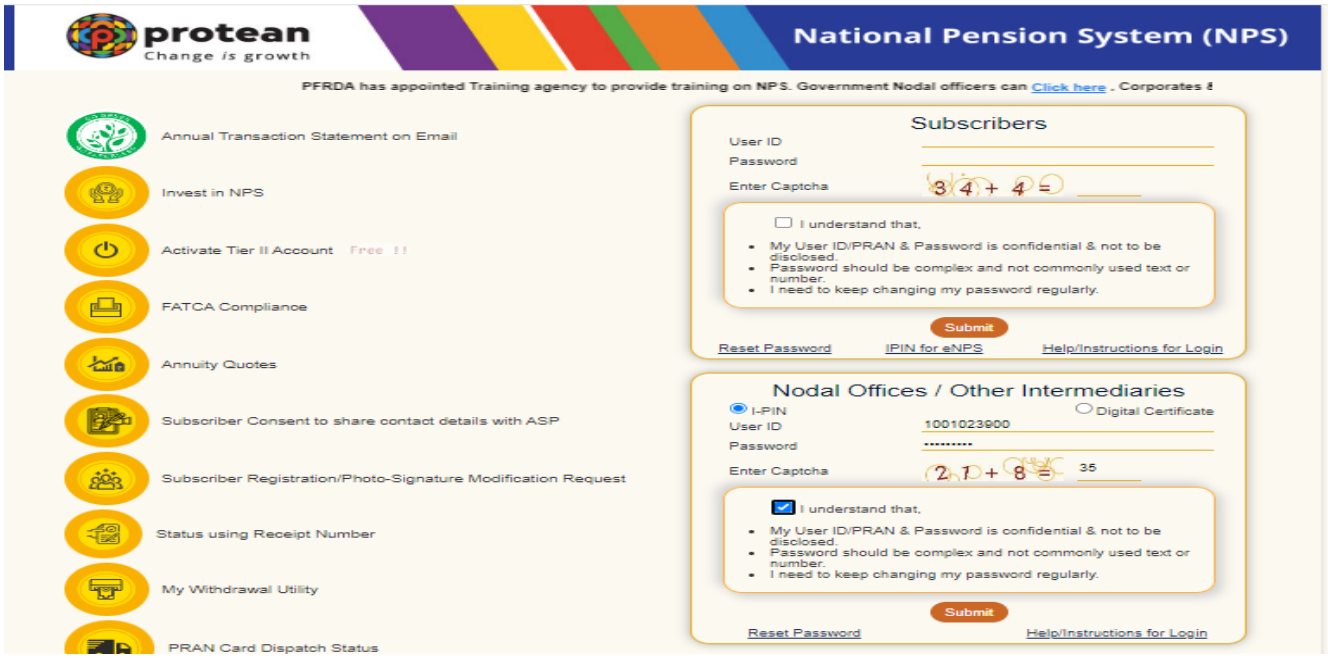


Figure 1

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

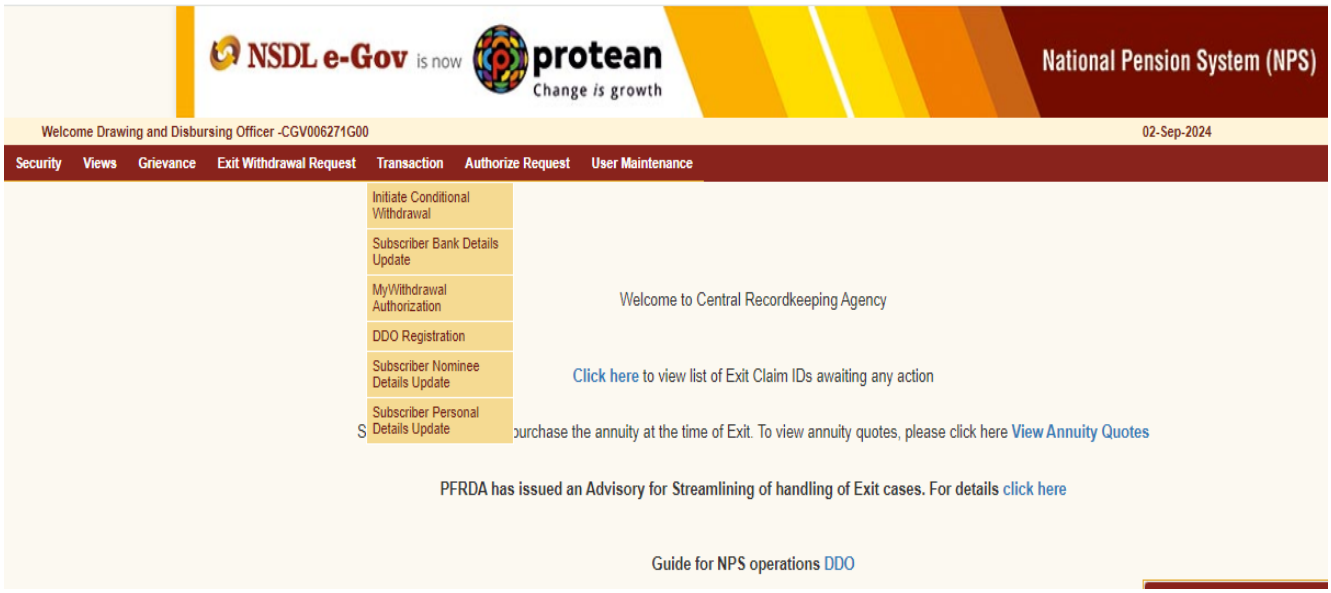


Figure 2

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

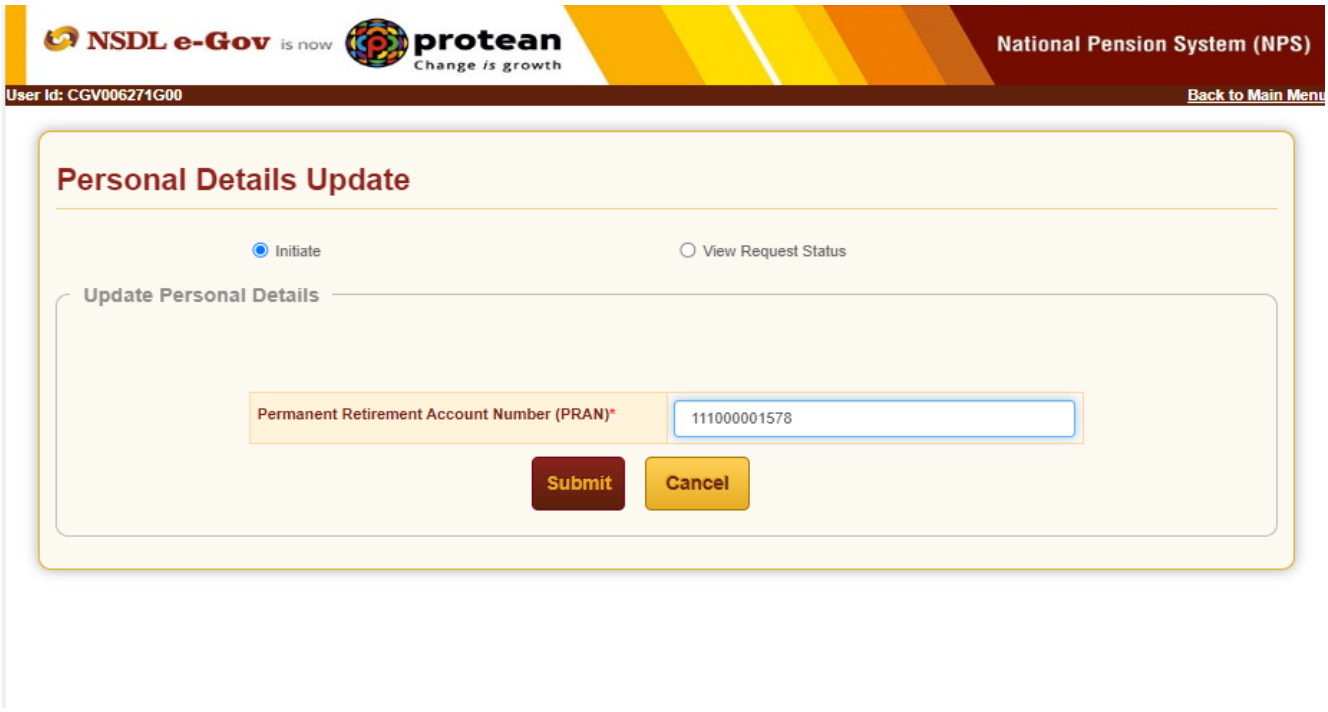


Figure 3

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

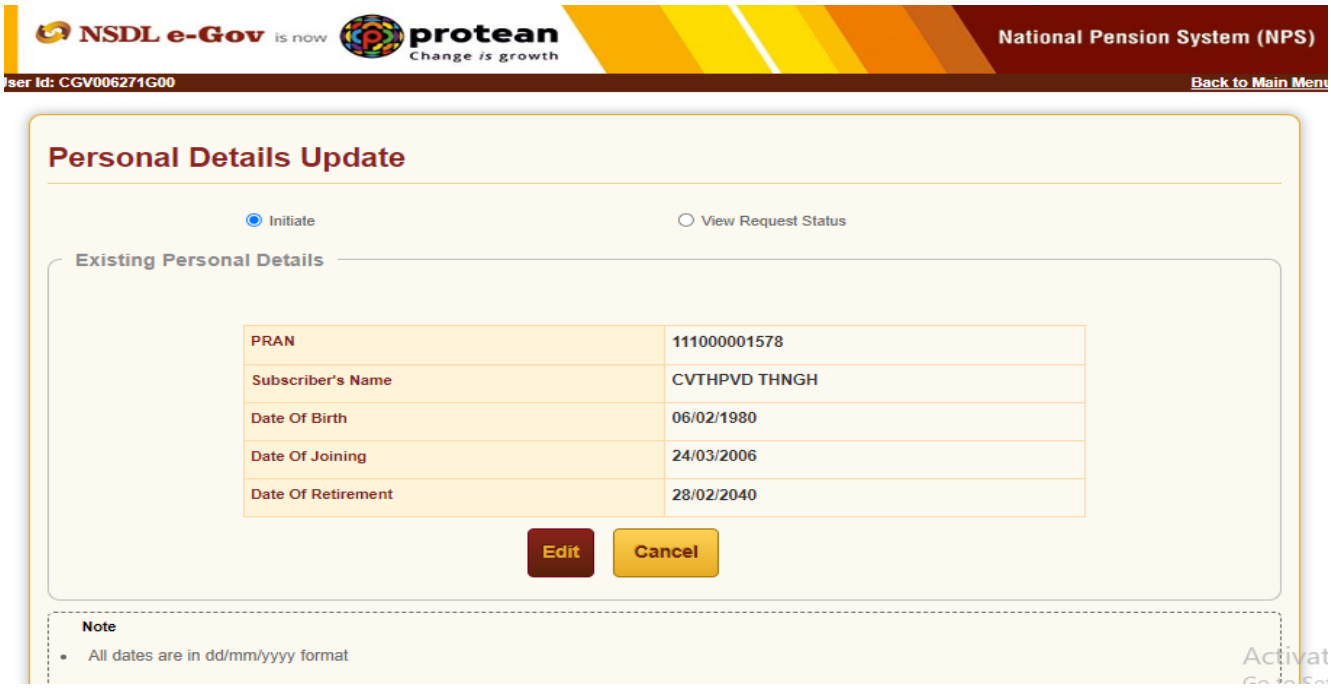


Figure 4

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

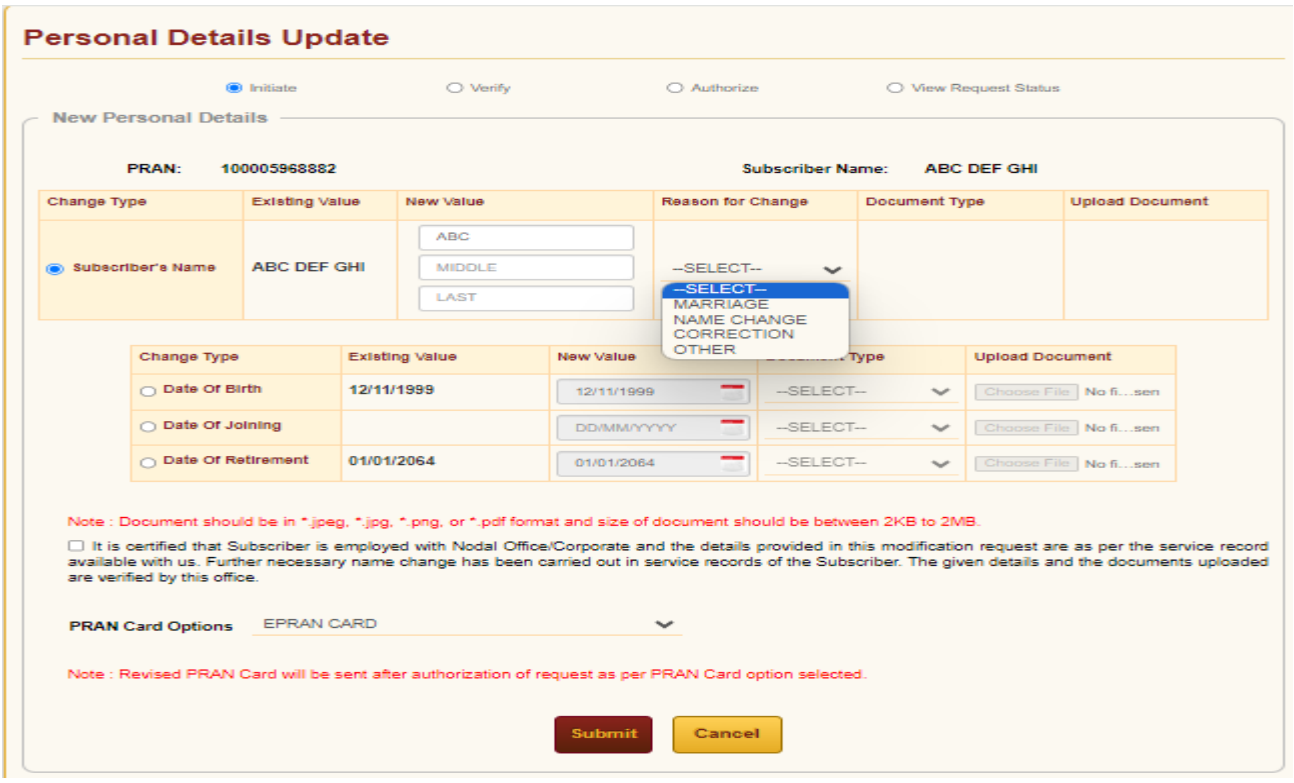


Figure 5

- Upload the supporting document proof for name change and tick on the declaration. Select PRAN card option and click on **"Submit"** *(Please refer Figure 6 and 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.

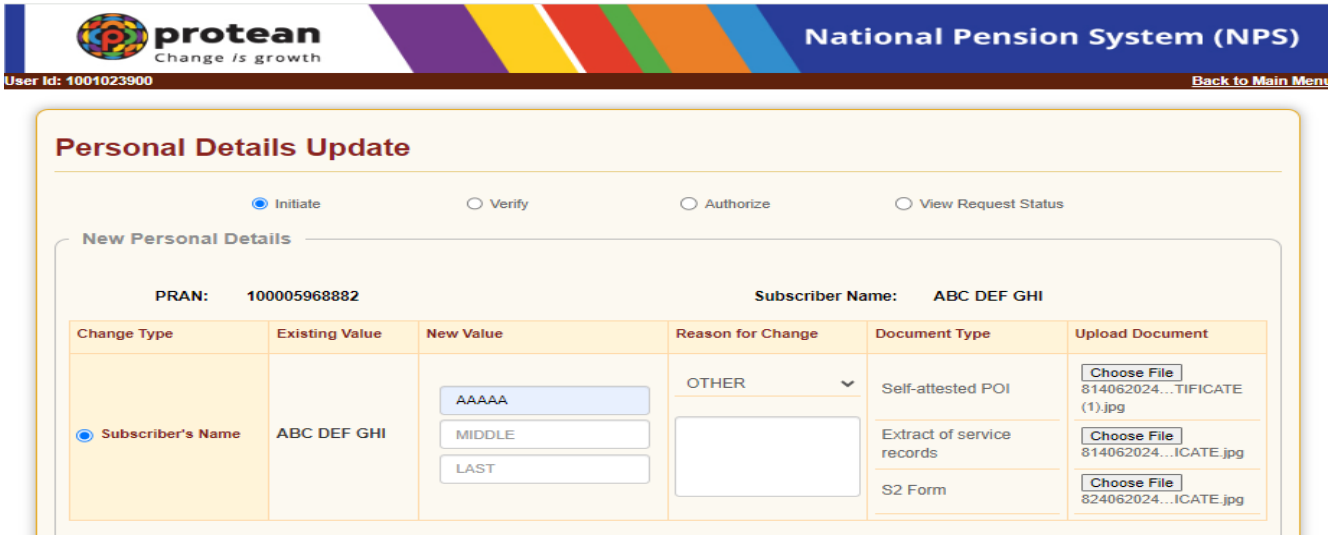


Figure 6

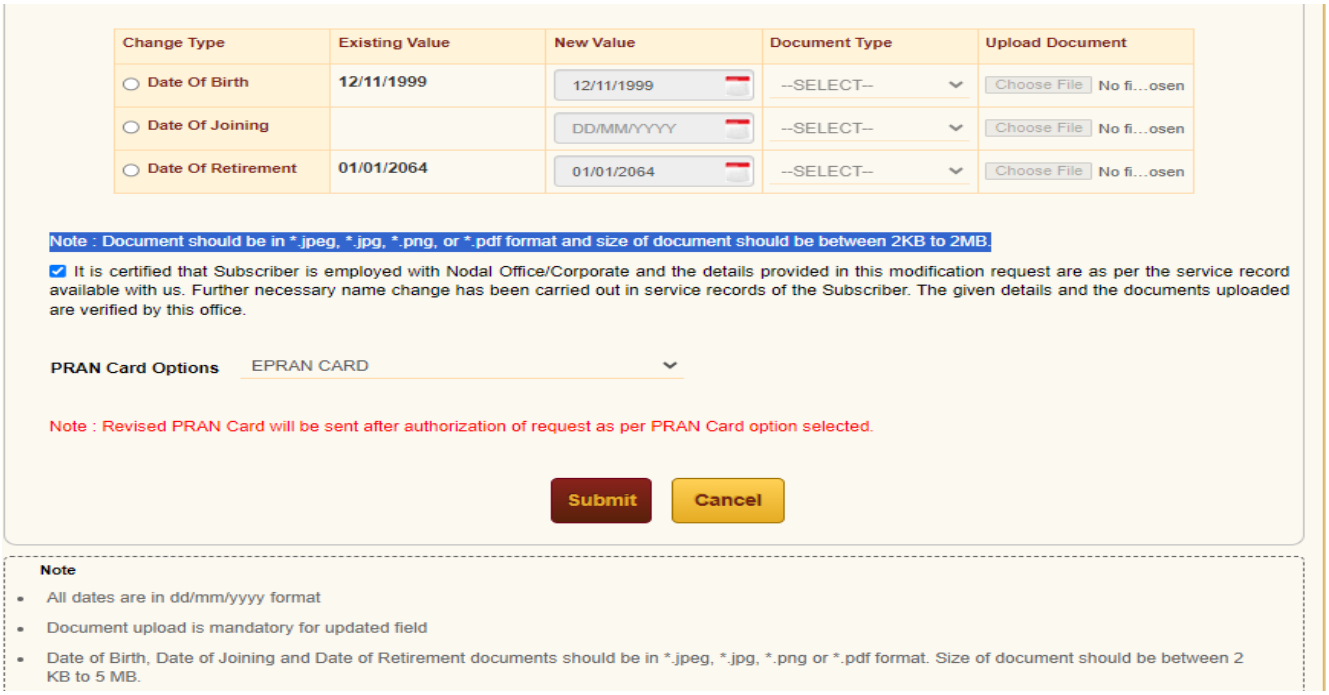
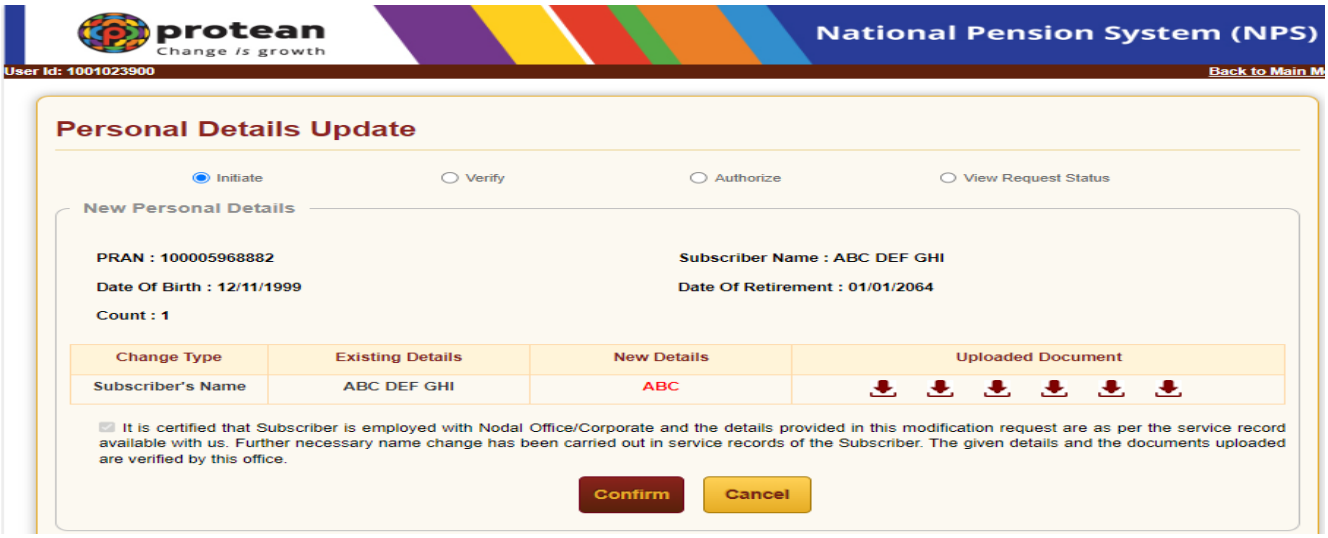


Figure 7

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

Figure 8


protean
Change is growth
National Pension System (NPS)
User Id: 1001023900
Back to Main M
Personal Details Update
Initiate
Verify
Authorize
View Request Status
New Personal Details
PRAN : 100005968882
Subscriber Name : ABC DEF GHI
Date Of Birth : 12/11/1999
Date Of Retirement : 01/01/2064
Count : 1
Change Type
Existing Details
New Details
Uploaded Document
Subscriber's Name
ABC DEF GHI
ABC
It is certified that Subscriber is employed with Nodal Office/Corporate and the details provided in this modification request are as per the service record available with us. Further necessary name change has been carried out in service records of the Subscriber. The given details and the documents uploaded are verified by this office.
Confirm
Cancel

- Request will be captured successfully and acknowledge number will be displayed on screen**.** *(Please refer Figure 9).*

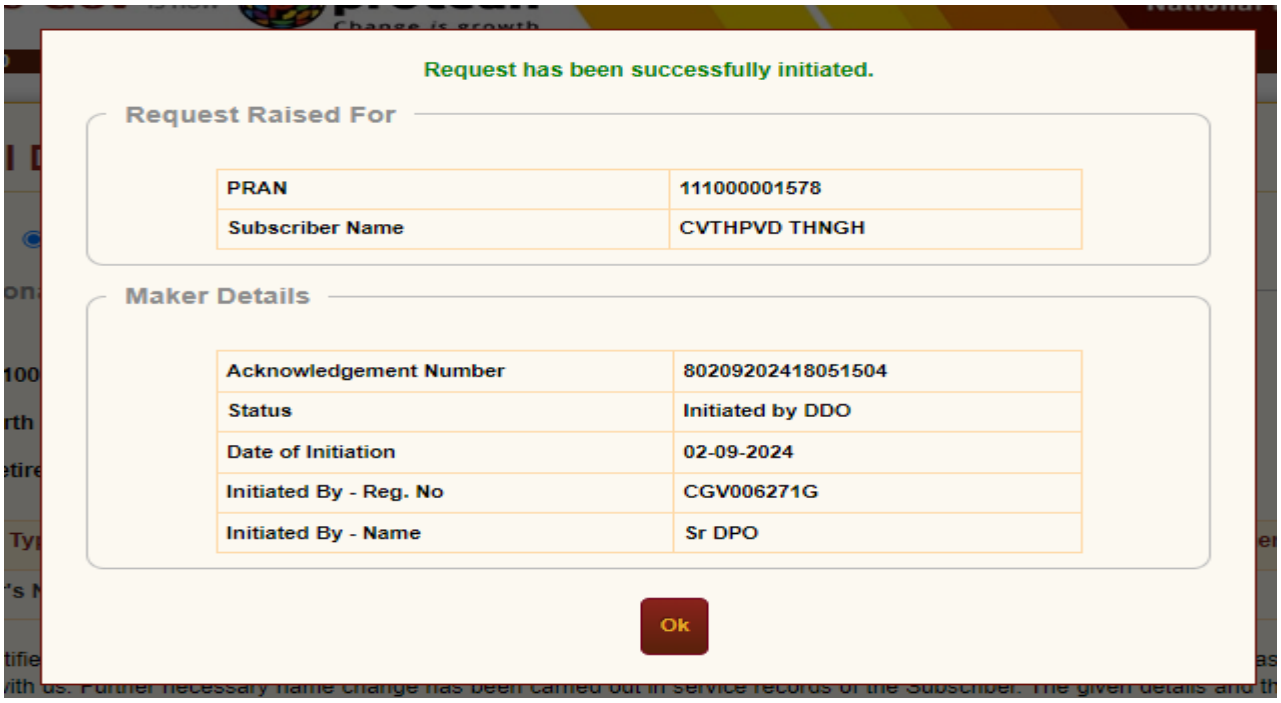
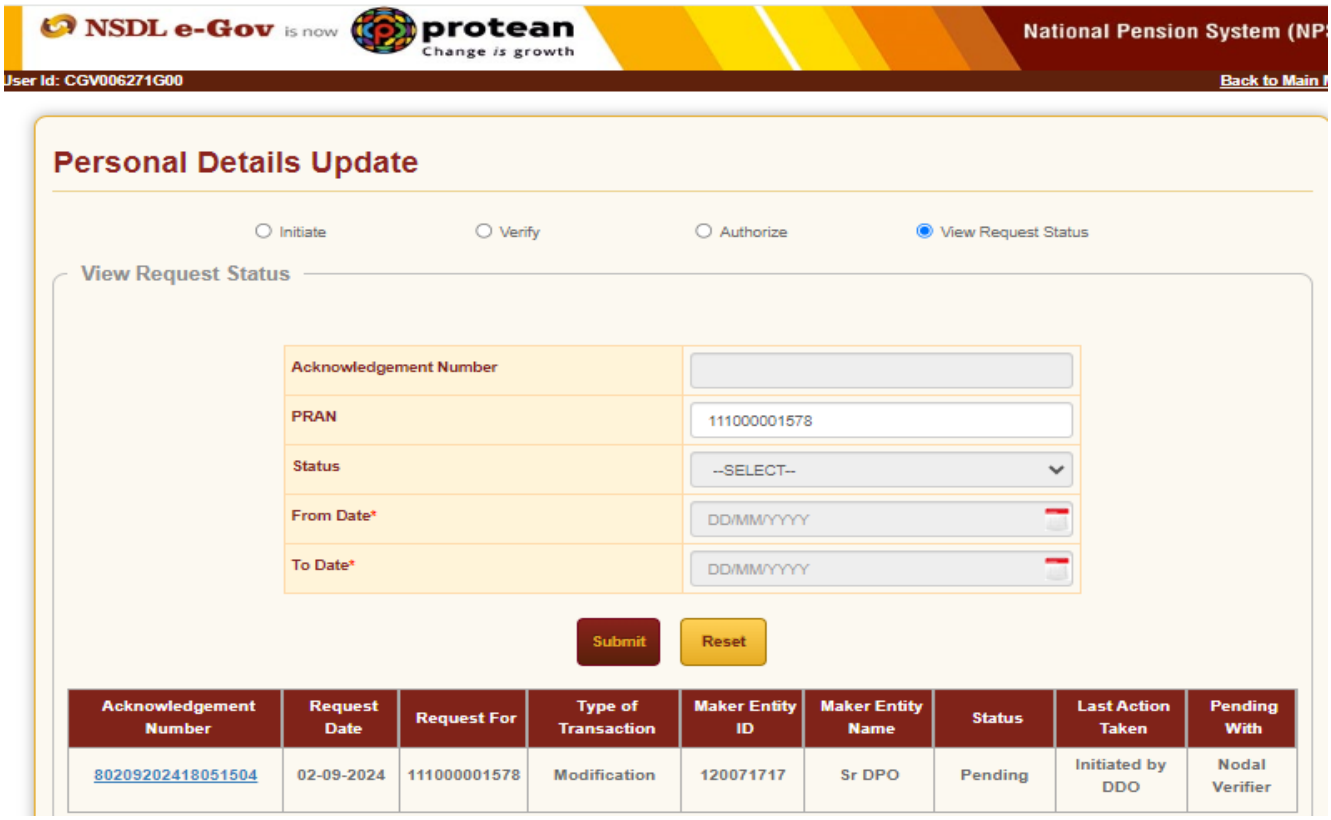


Figure 9

- To view status of request, click on "Transaction" →"Subscriber Personal Details Update"→ **"View Request Status"-→ "Submit"** *Please refer Figure 10 and 11).*

Figure 10


NSDL e-Gov is now protean Change is growth
National Pension System (NP
User Id: CGV006271G00
Back to Main
Personal Details Update
Initiate
Verify
Authorize
View Request Status
View Request Status
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PRAN
111000001578
Status
--SELECT--
From Date*
DD/MM/YYYY
To Date*
DD/MM/YYYY
Submit
Reset
Acknowledgement Number
Request Date
Request For
Type of Transaction
Maker Entity ID
Maker Entity Name
Status
Last Action Taken
Pending With
80209202418051504
02-09-2024
111000001578
Modification
120071717
Sr DPO
Pending
Initiated by DDO
Nodal Verifier

Figure 11

B. Name Change Request Verification PAO/DTO office

Subscriber 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 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 https://cra-nsdl.com/CRA/. Enter **"User ID"** and password click on **"Submit"** *(Please refer Figure 12)*

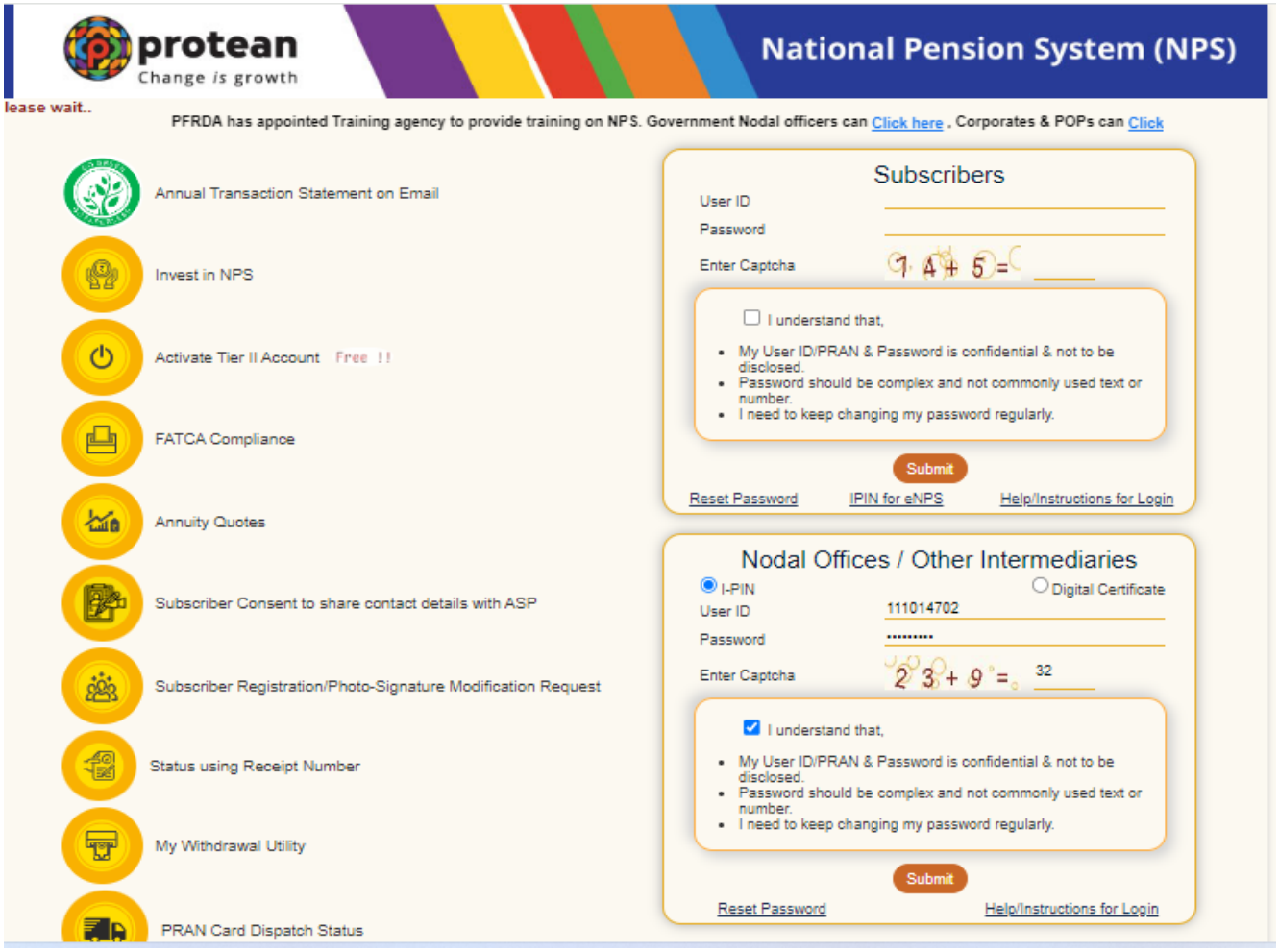


Figure 12

- Click on option Transaction--→ Subscriber Personal Details Update--→ **"Verify".** Enter PRAN/acknowledgement ID. Click on **"Submit."**

(Please refer Figure 13 and 14)

Figure 13

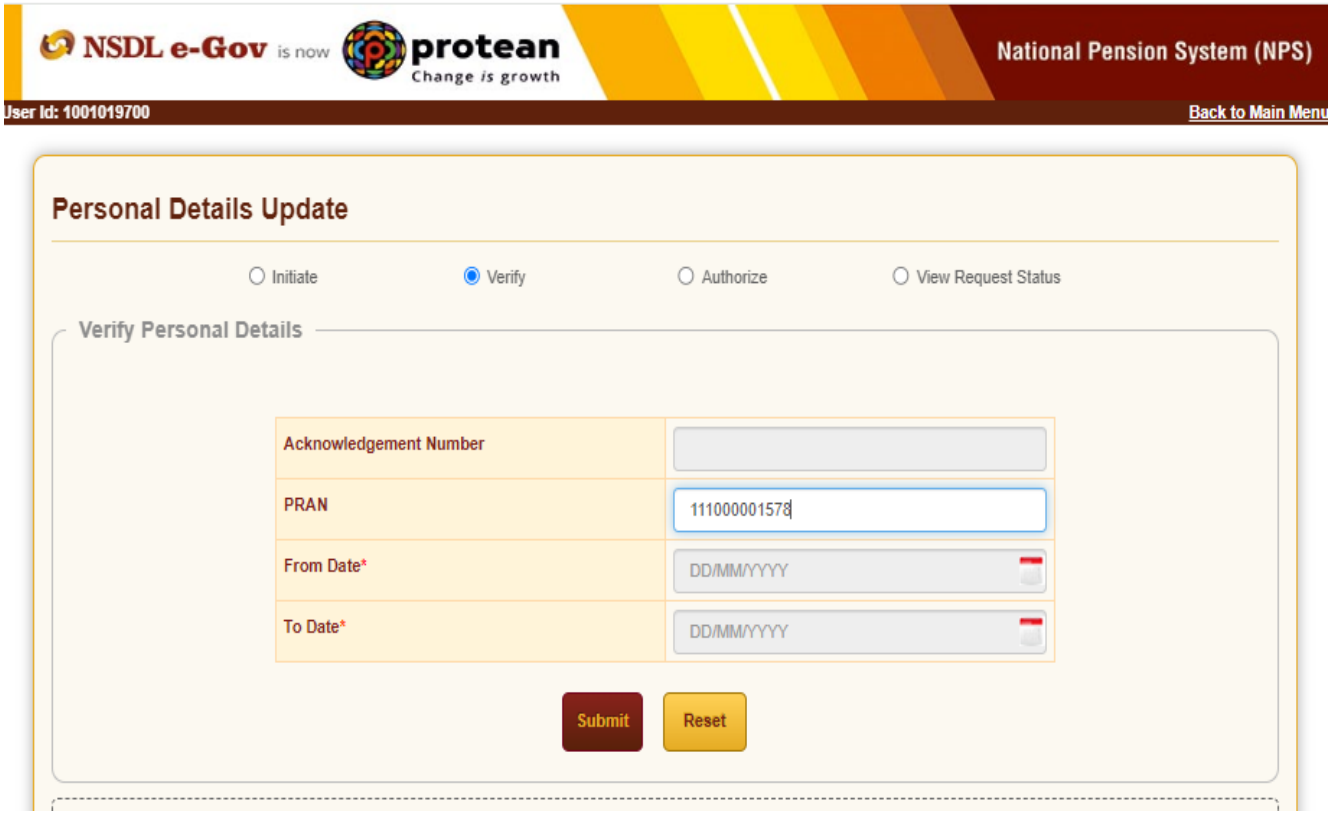


Figure 14

- Details of pending request will be visible on screen. *(Please refer Figure 15,16 and 17).* To check and verify the details entetred by PAO office, click of hyperlink "Acknowledgement number".

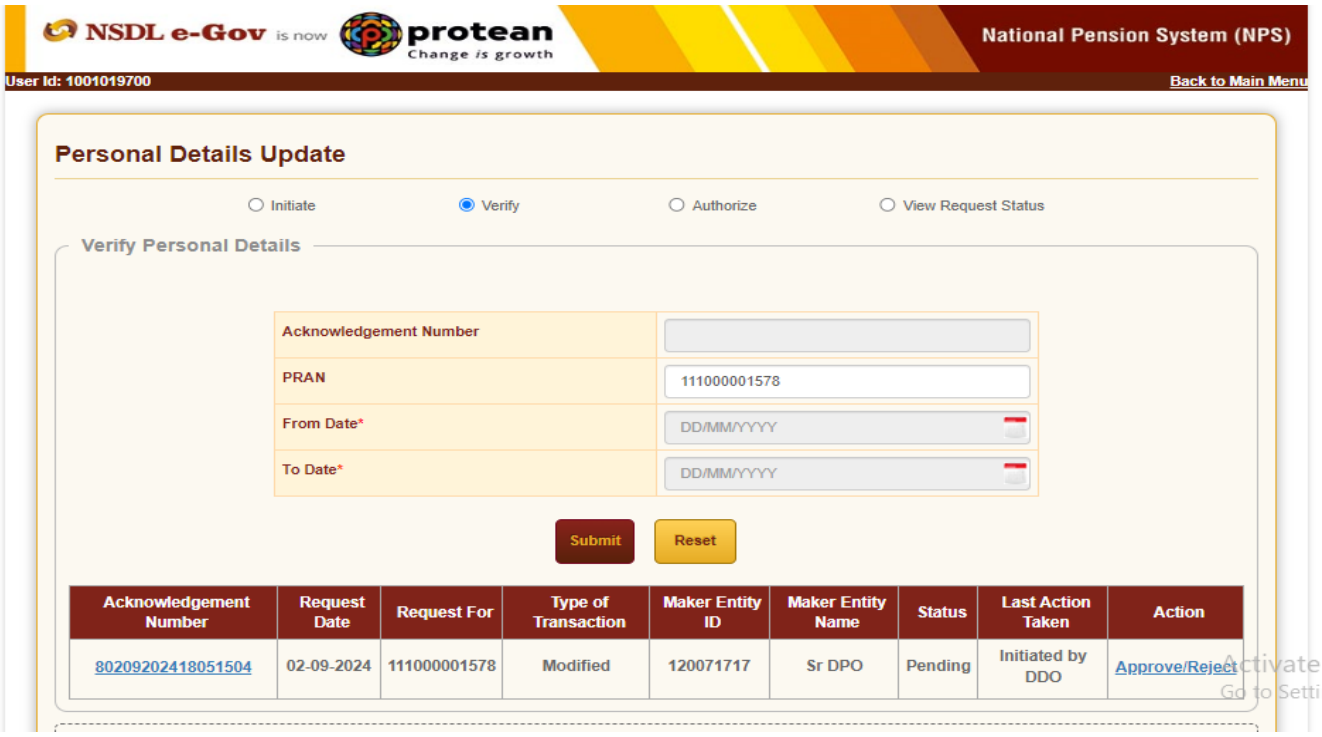


Figure 15

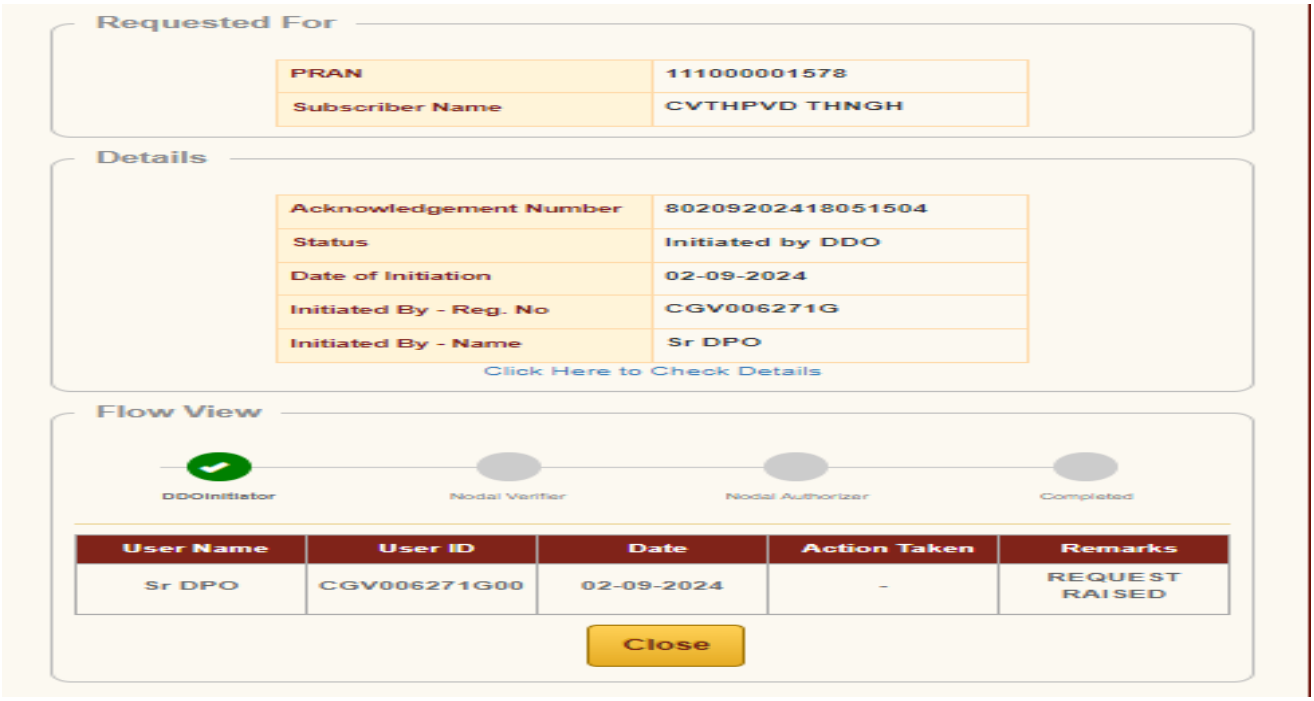


Figure 16

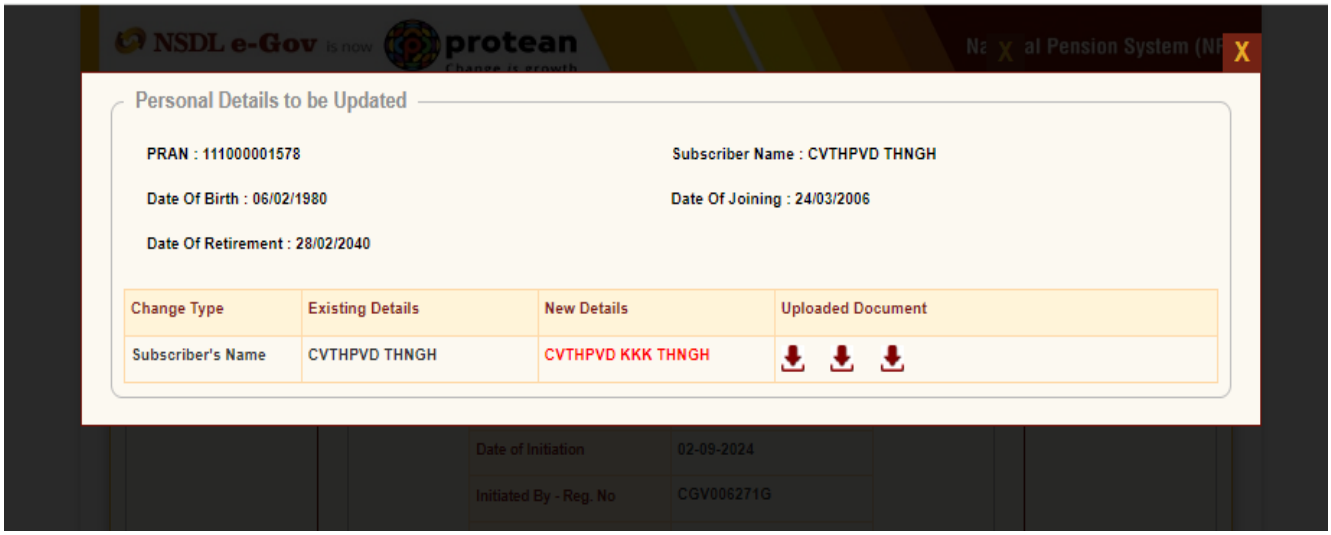


Figure 17

- PAO nodal office can Accept/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 18*)

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

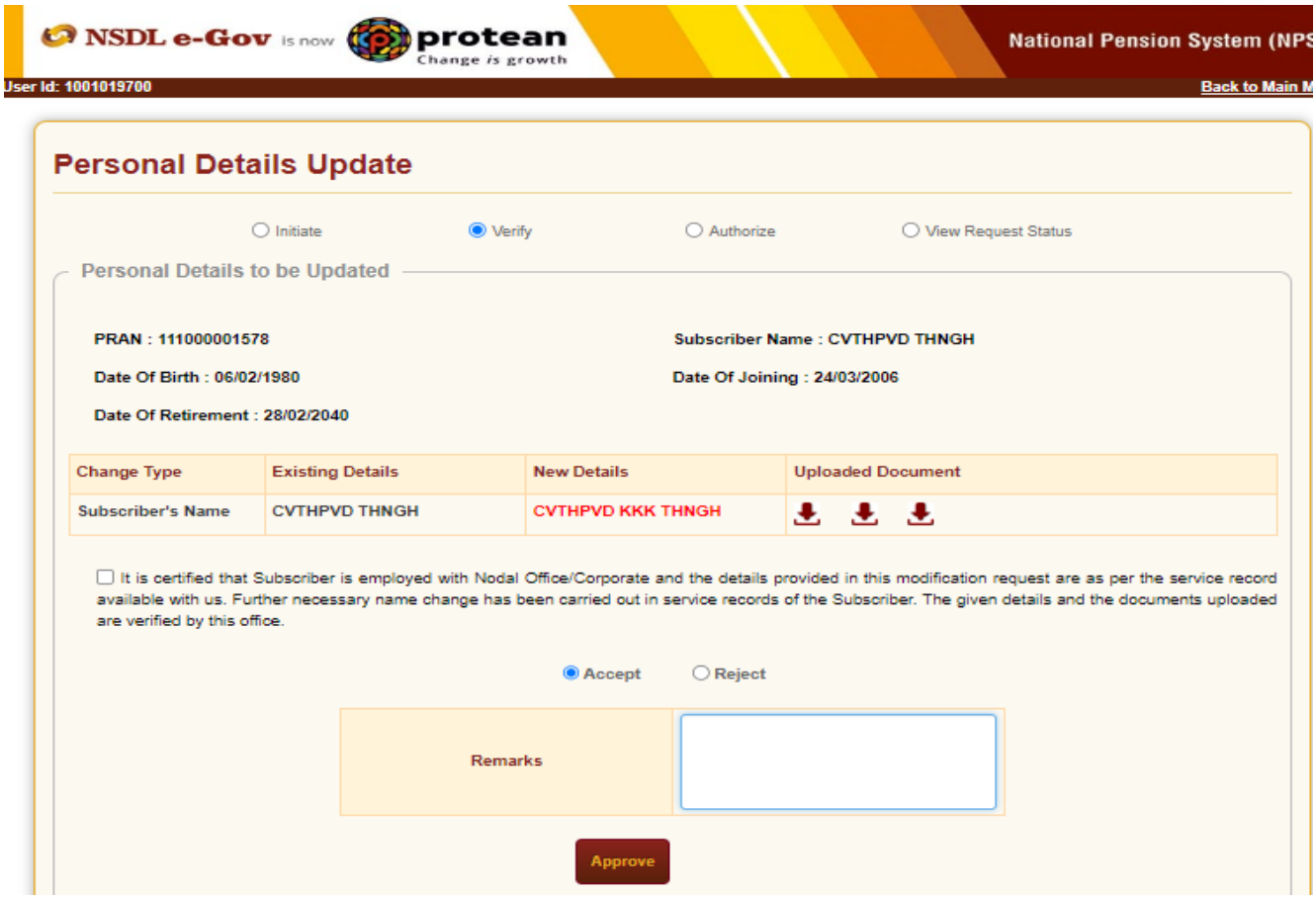


Figure 18

- Click on **"Confirm"** to submit the details. *(Please refer Figure 19).*

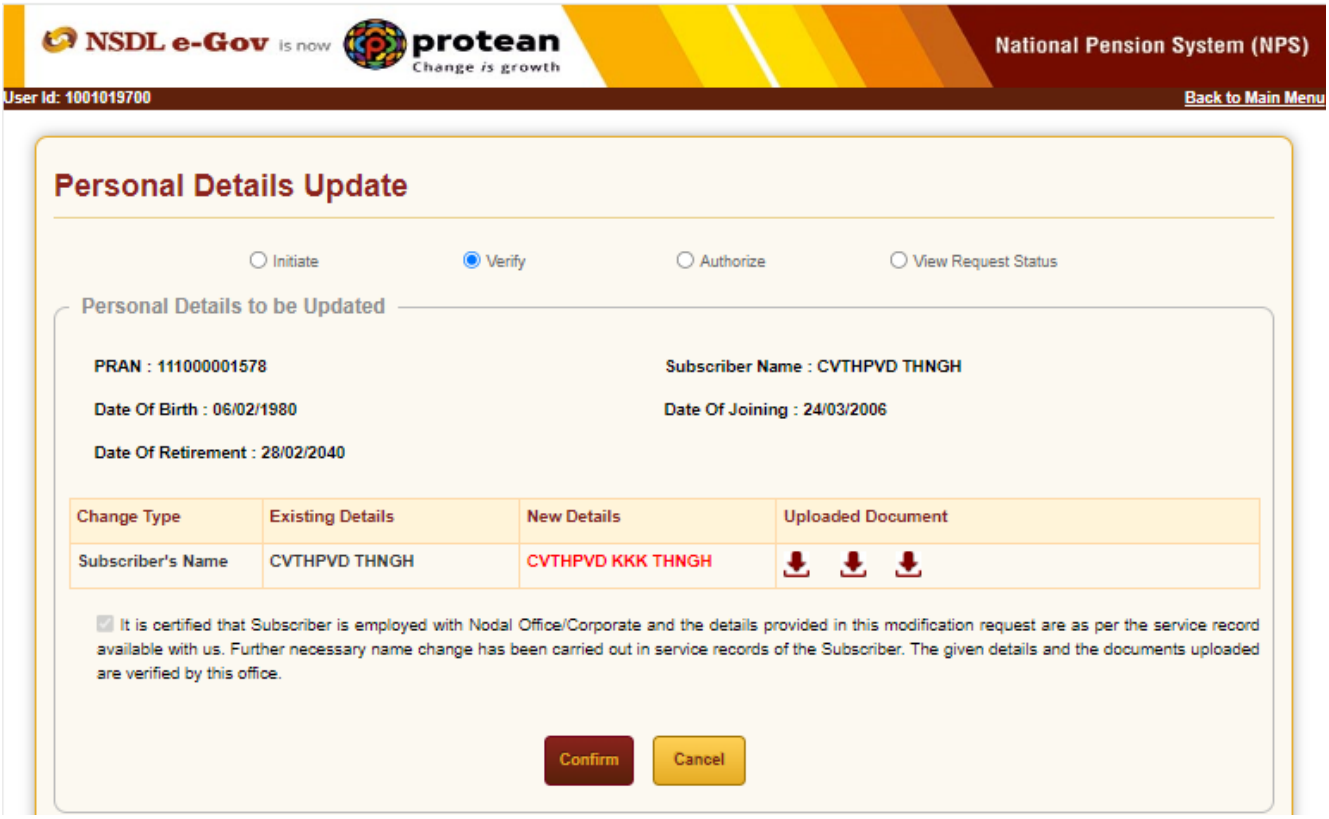


Figure 19

- On successful verification of request, the acknowlwdgement details will be visible on screen. *(Please refer Figure 20).*

Figure 20

- To view status of request, click on "Transaction" →"Subscriber Personal Details Update"→ **"View Request Status"-→ "Submit"** (*Please refer Figure 21 and 22).*

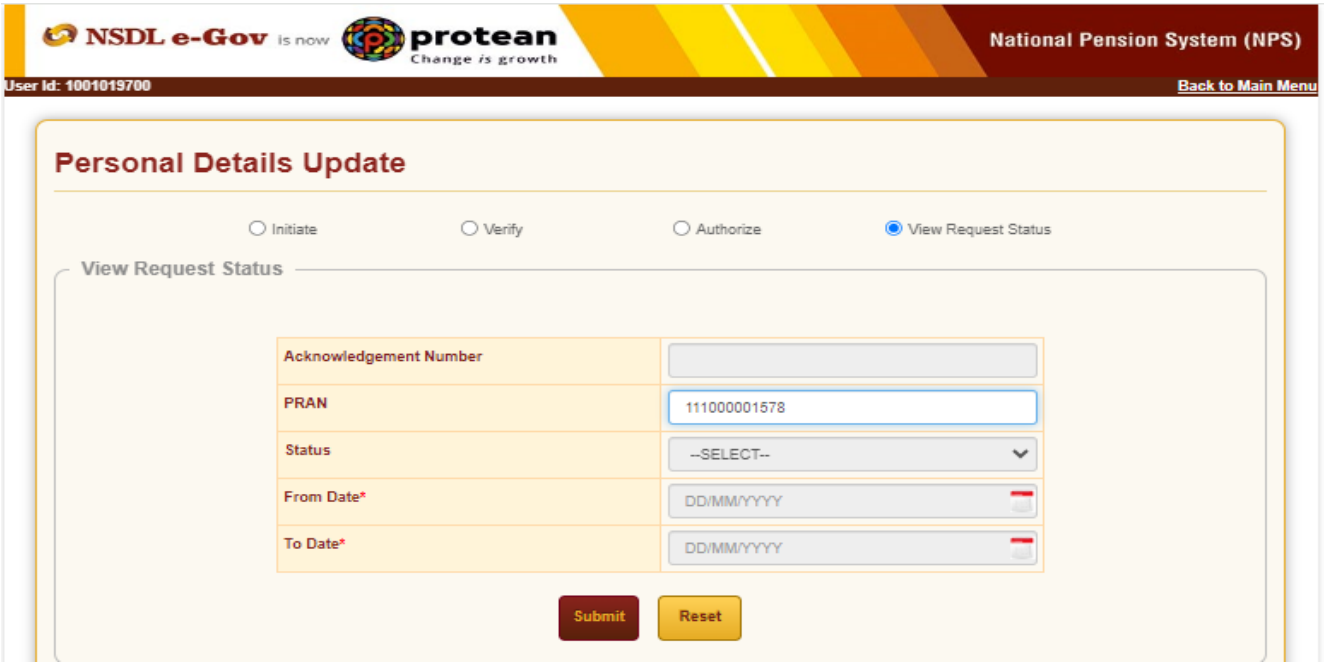


Figure 21

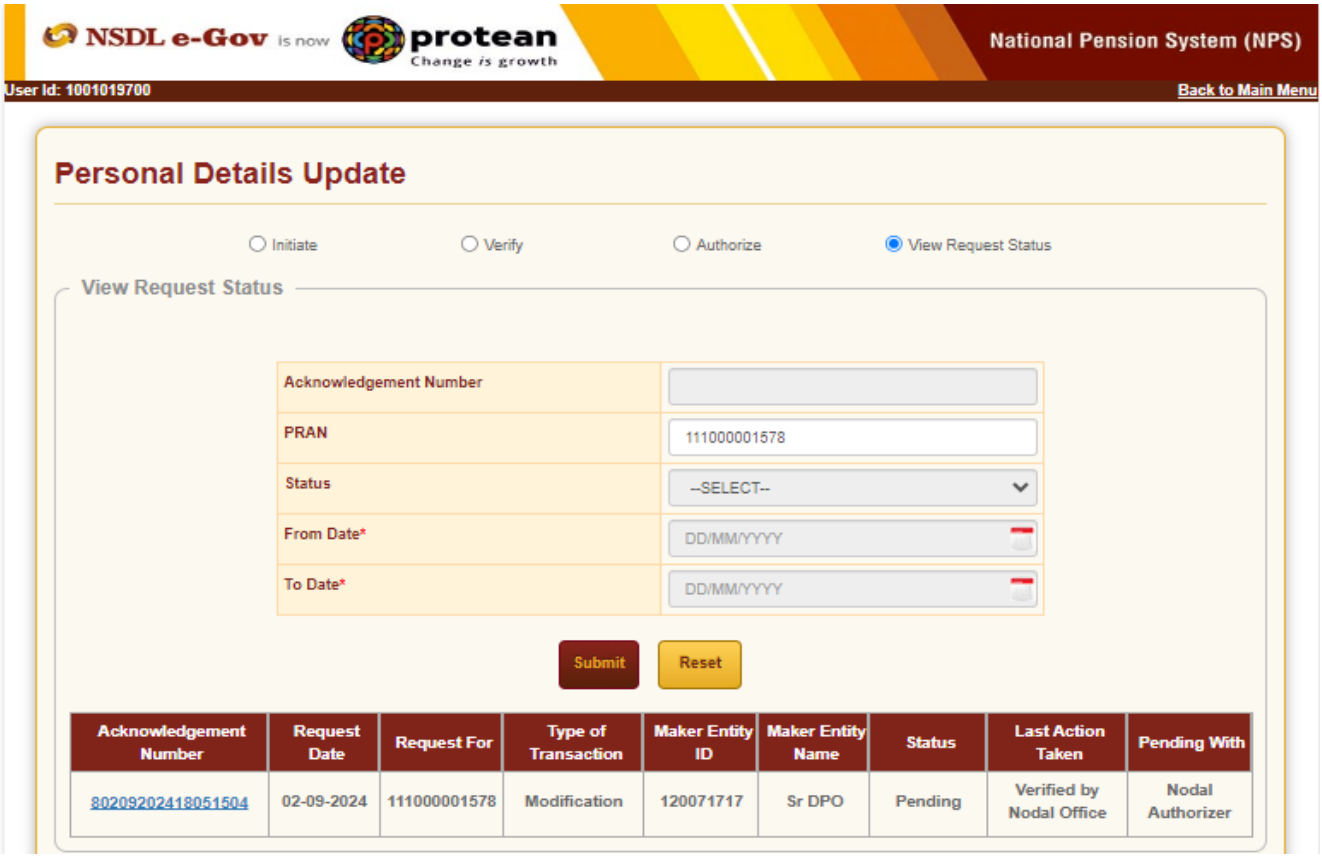


Figure 22

C. Name Change Request Authorization PrAO/DTA office

- PrAO/DTA nodal office will log in to CRA portal https://cra-nsdl.com/CRA/. Enter **"User ID"** and password click on **"Submit"** *(Please refer Figure 23)*

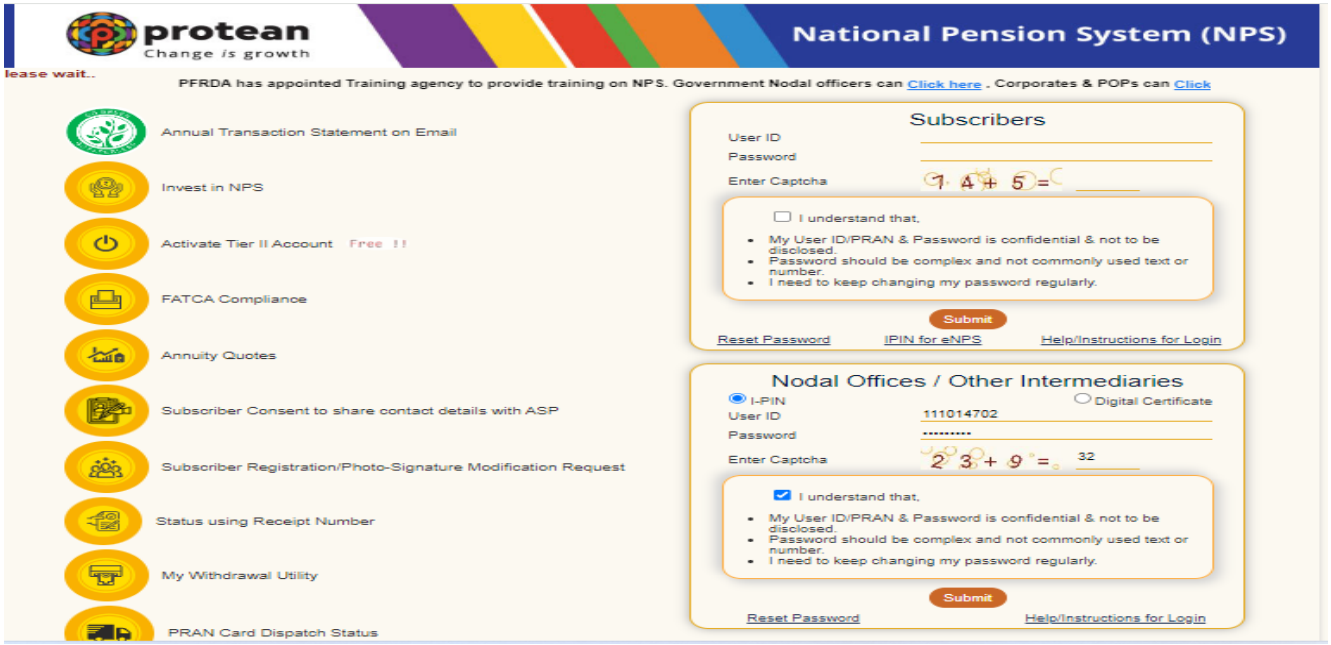


Figure 23

- Click on option Transaction--→ Subscriber Personal Details Update--→ **"Authorize".** Enter PRAN/acknowledgement ID. Click on **"Submit."**

(Please refer Figure 24 and 25)

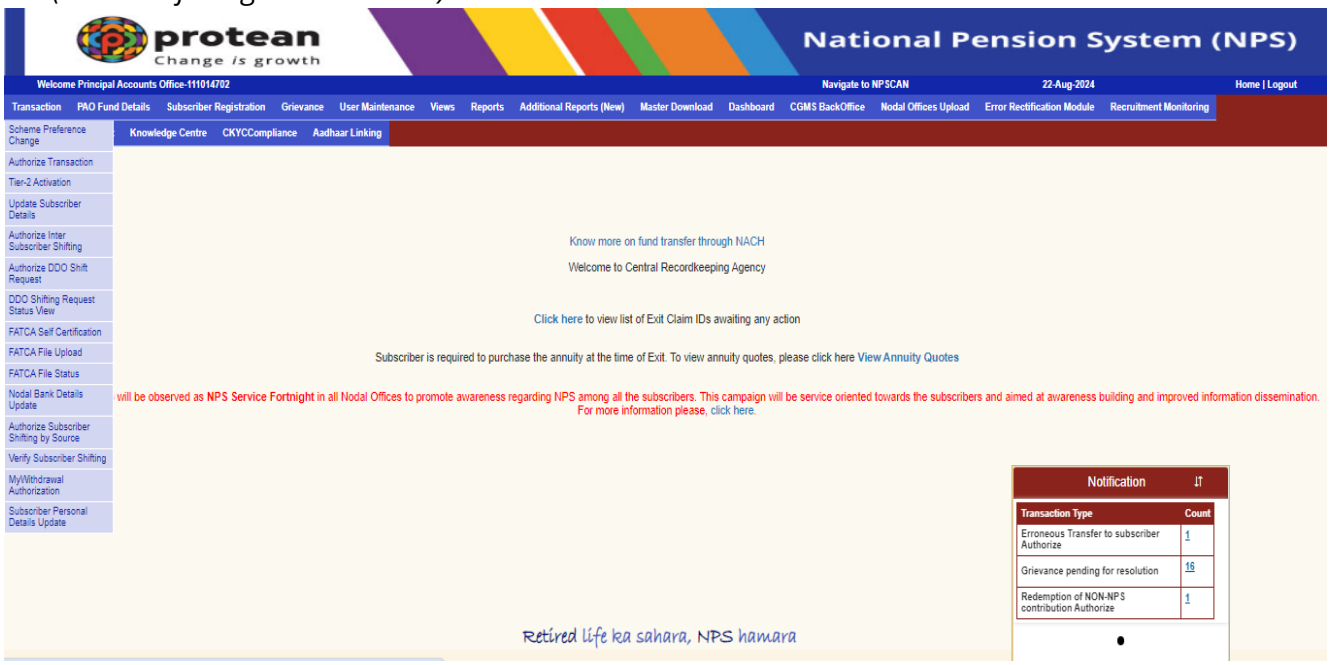


Figure 24

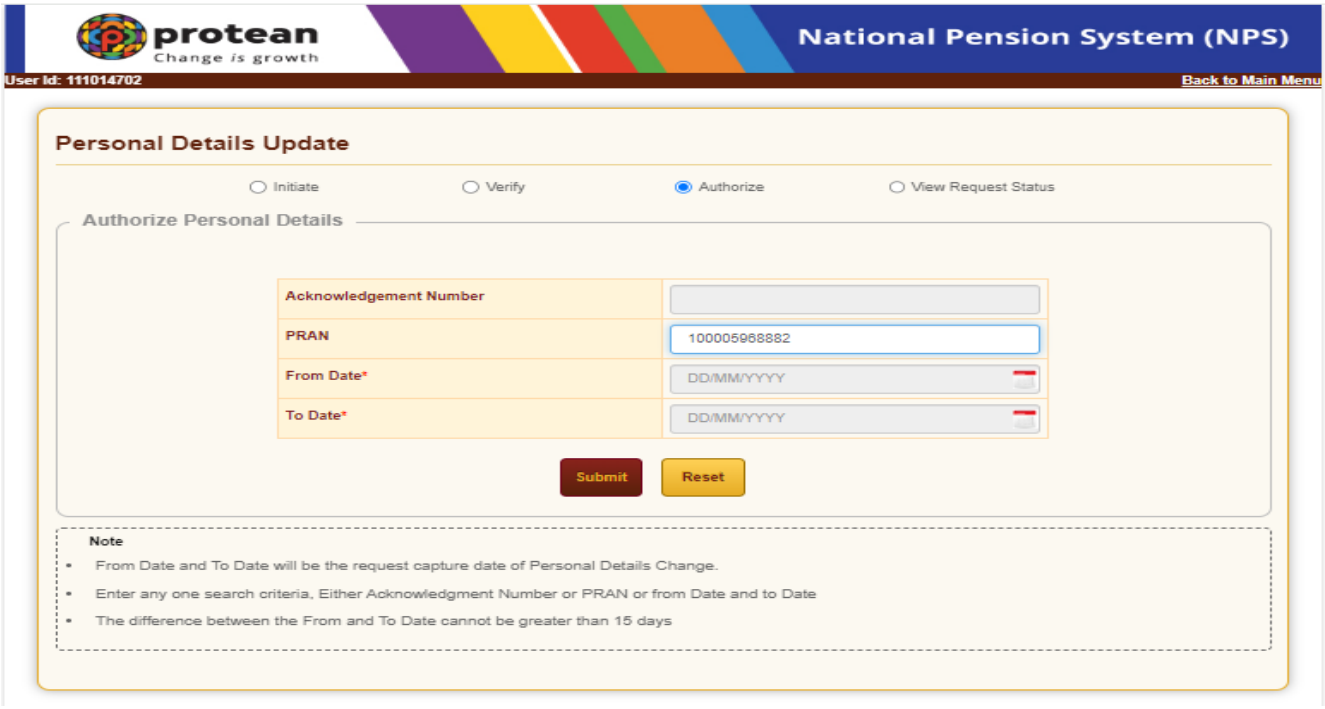


Figure 25

- 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. ***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***

  Office can mention reason for rejection/accepatance of request while authoriation. *(Please refer Figure 26).*

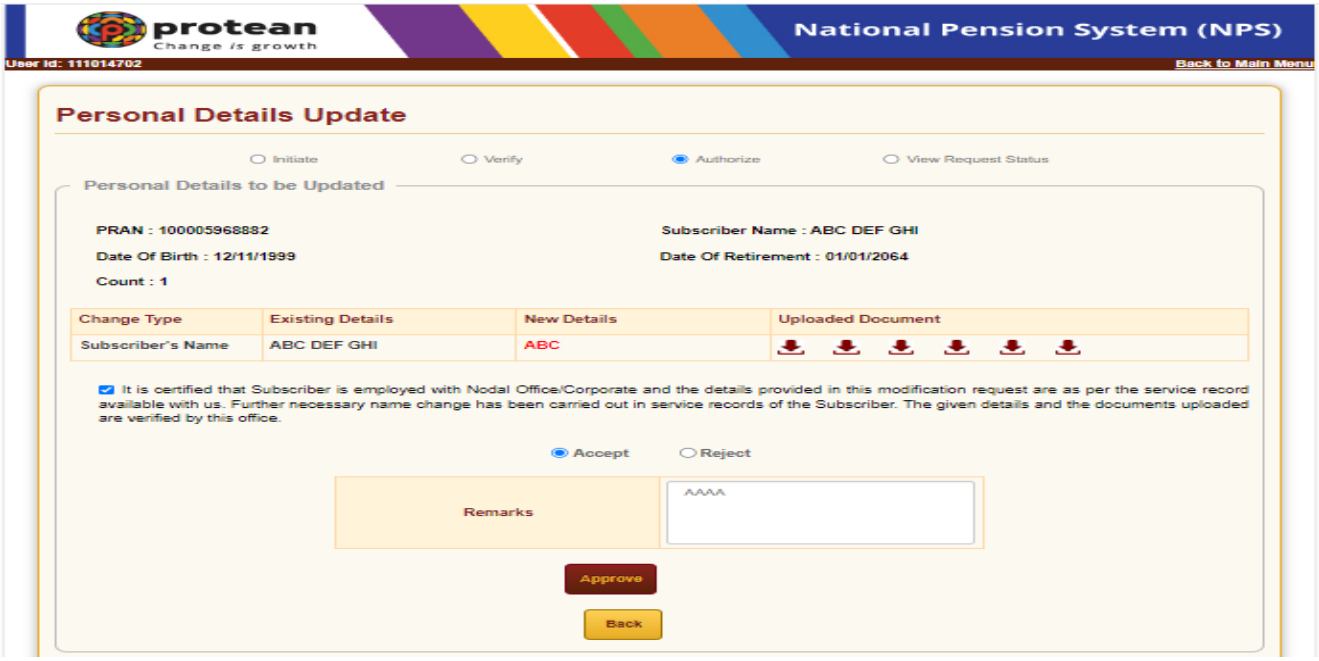


Figure 26

- Click on **"Confirm"** to submit the details. *(Please refer Figure 27).*

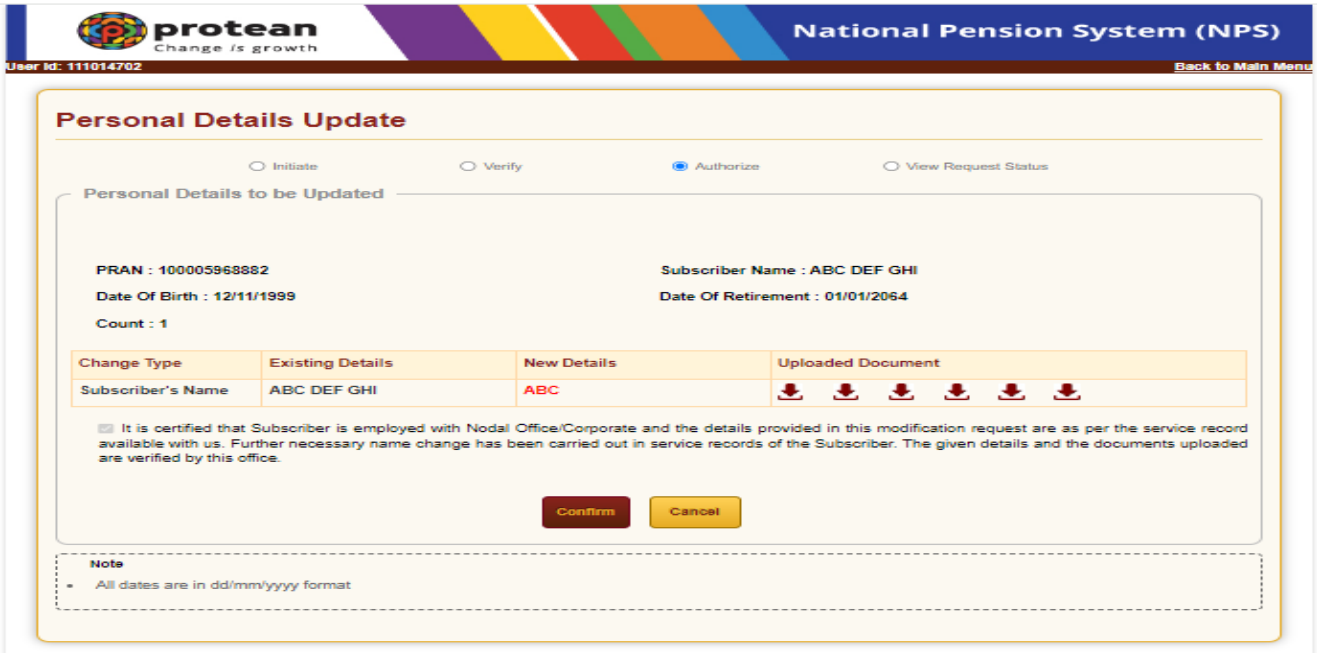


Figure 27

- On successful authorization of request, the acknowlwdgement details will be visible on screen. *(Please refer Figure 28).*

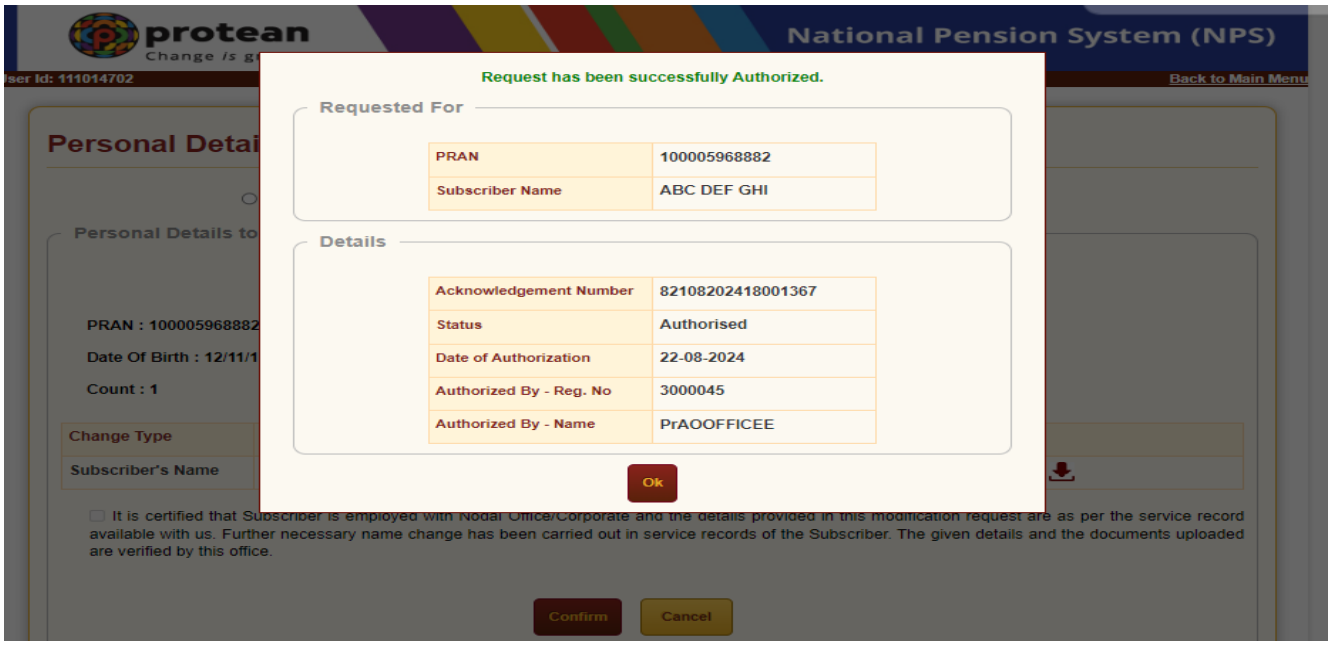


Figure 28

- To view status of request, click on "Transaction" →"Subscriber Personal Details Update"→ **"View Request Status"-→ "Submit"** (*Please refer Figure 29 and 30).*

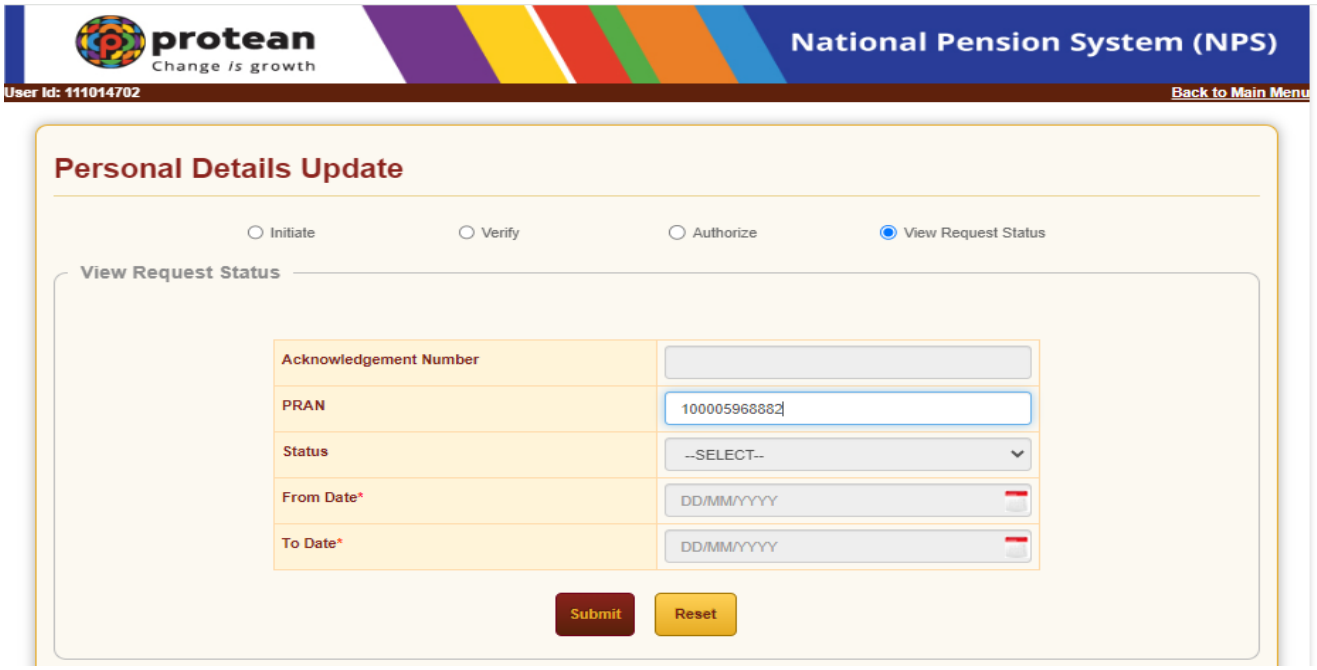


Figure 29

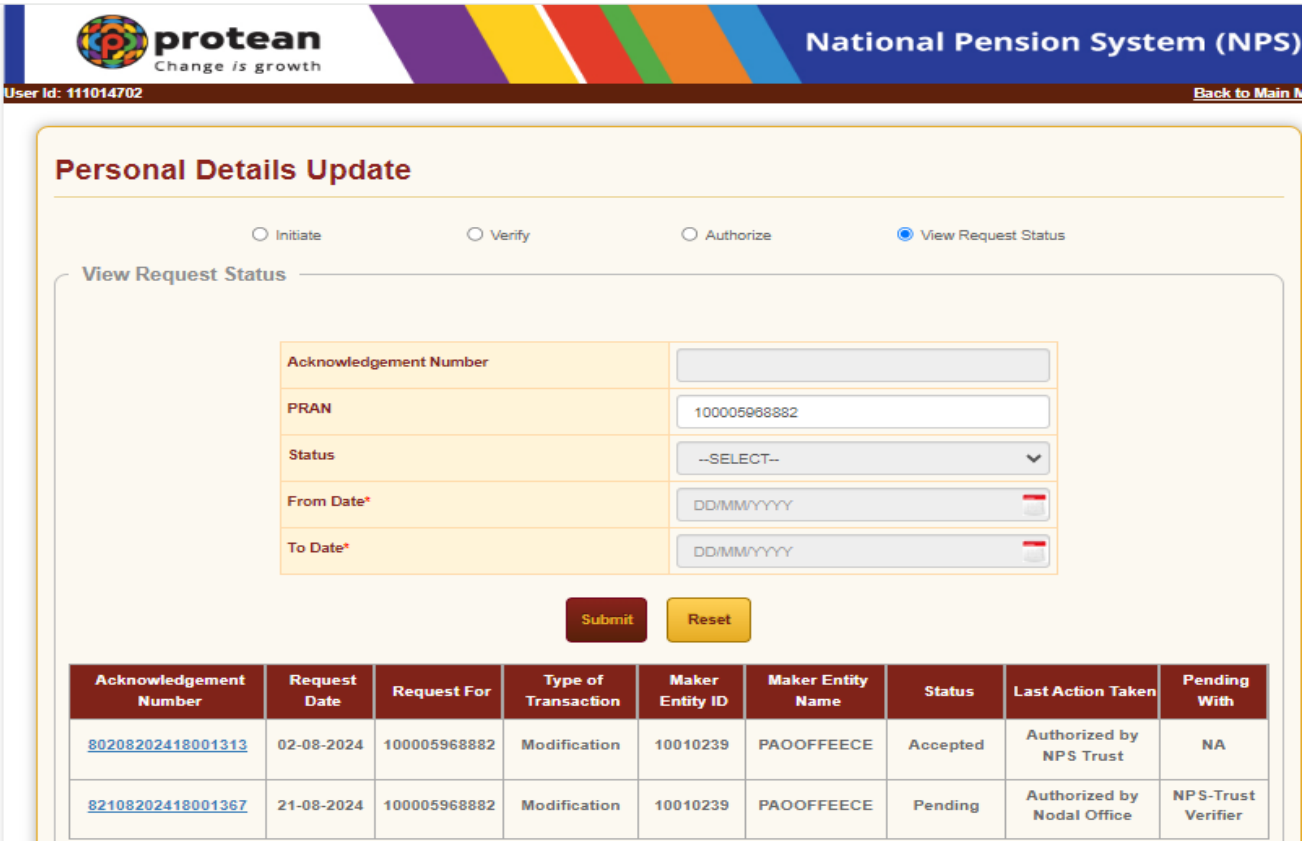


Figure 30

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 **DDO** nodal office need to be **verified and authorized** by PAO/DTO /PrAO/DTA nodal office.

- Date of Birth (DoB) change request Initiated by nodal office PAO/DTO/PrAO/DTA user 1 can be authorized by PAO/DTO PrAO/DTA nodal office User 2.

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

➢ DDO/PAO office will log in to CRA portal https://cra-nsdl.com/CRA/. Enter **"User ID"** and password click on **"Submit"** *(Please refer Figure 32)*

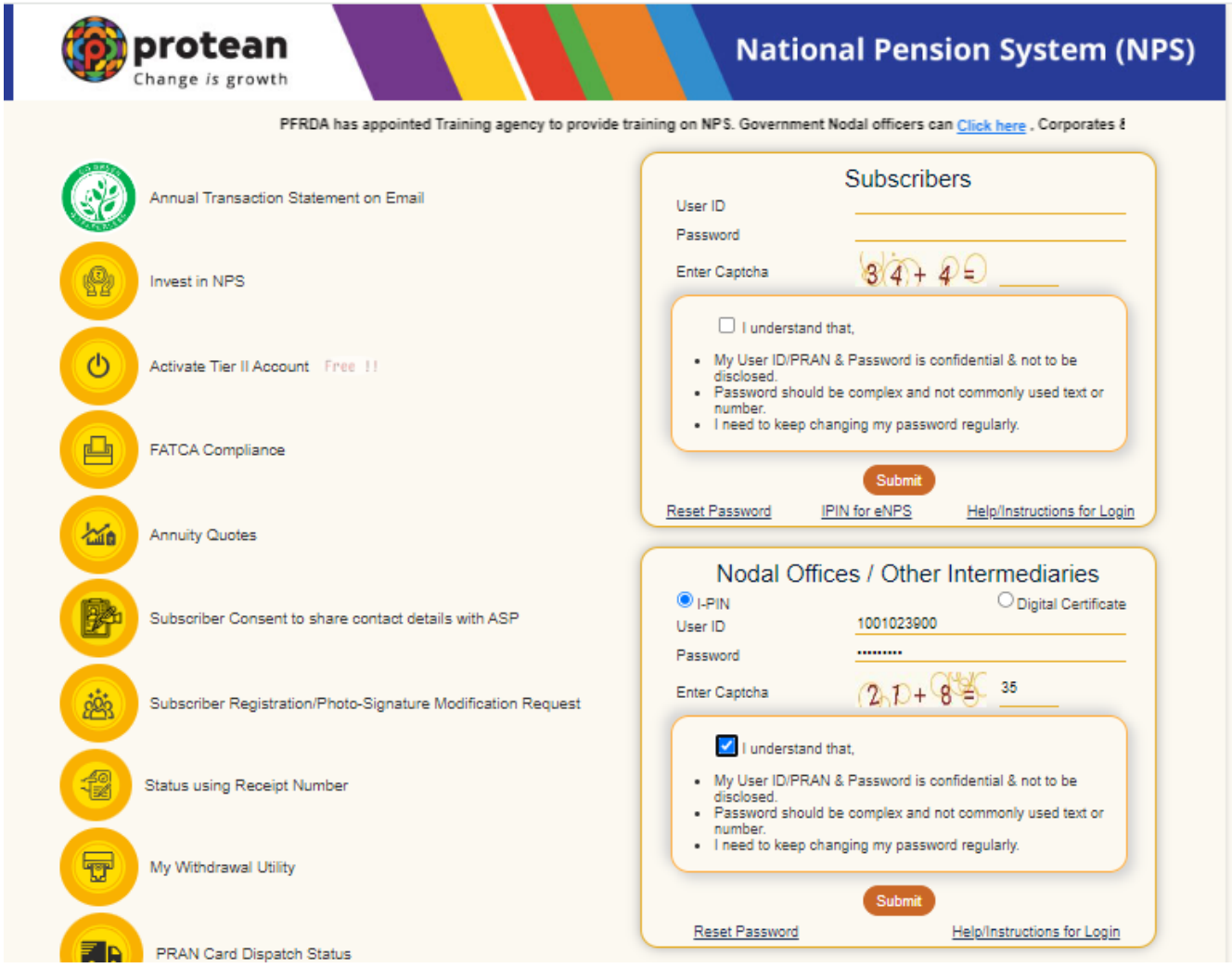


Figure 32

- Click on option **"Transaction"** and sub menu **"Subscriber Personal Details Update"** *(Please refer Figure 33)*

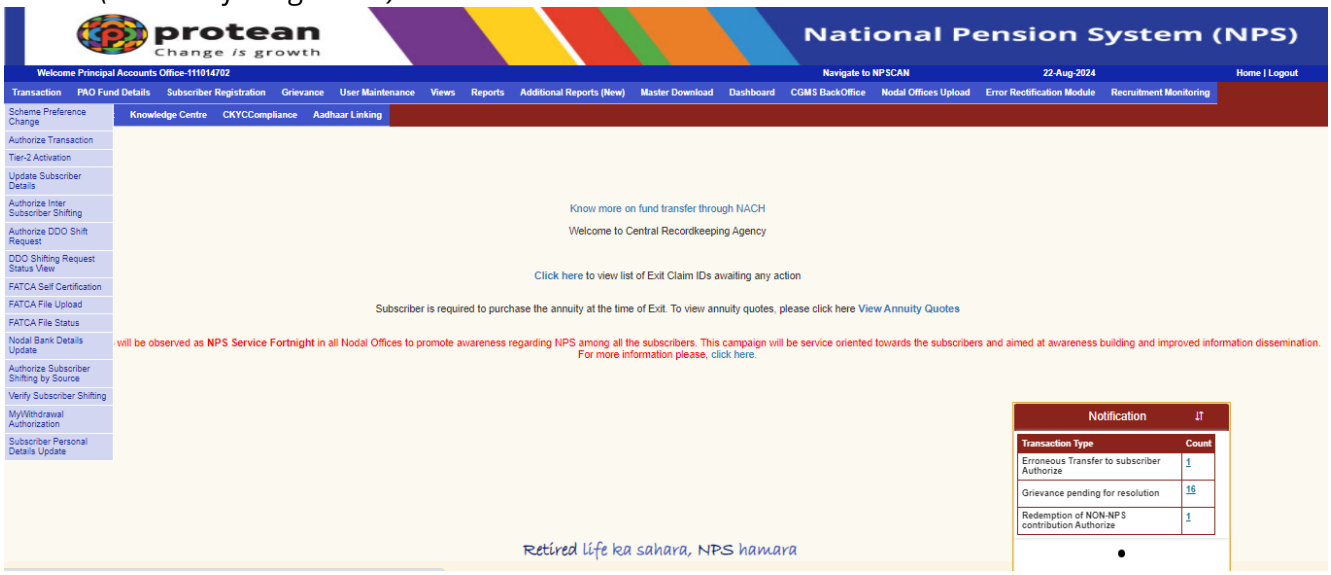


Figure 33

- Click on option **"Initiate"** and Enter PRAN. Click on **"Submit"** *(Please refer Figure 34)*

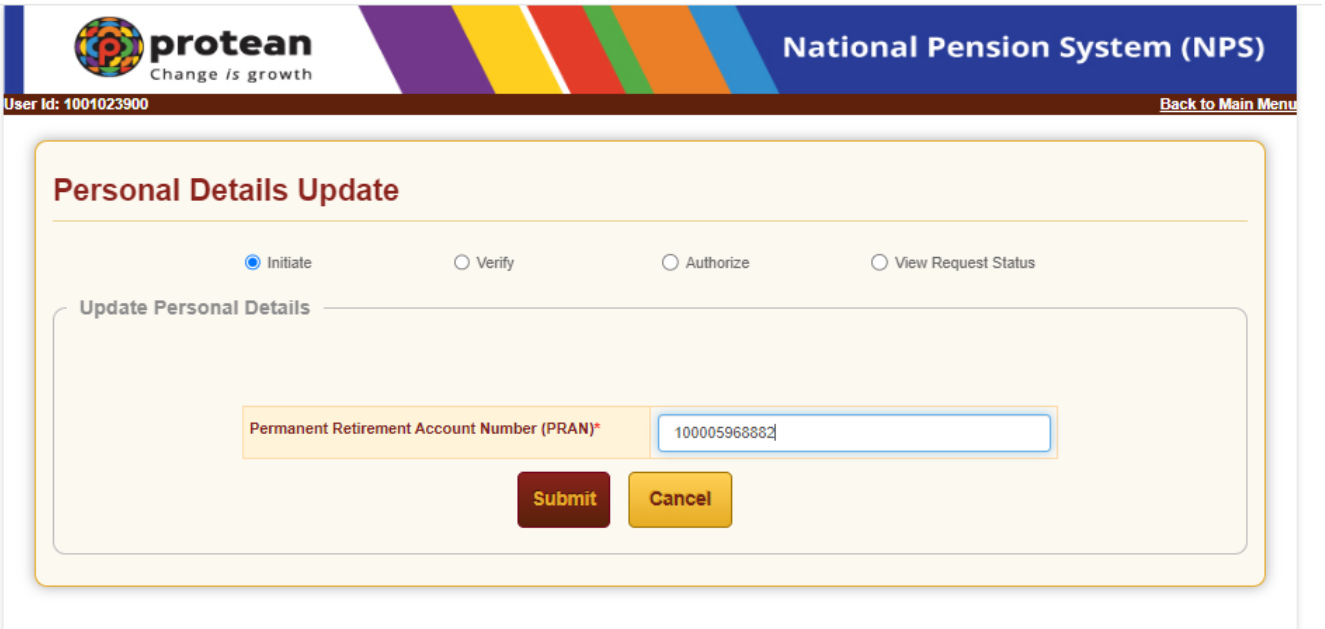


Figure 34

- Select the Change Type**, "Date of Birth".** Select supporting proof form available list and Upload document. Tick the declaration. Click on **"Submit"** *(Please refer Figure 35 and 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 DoB to be updated is matching with service record of the office.***

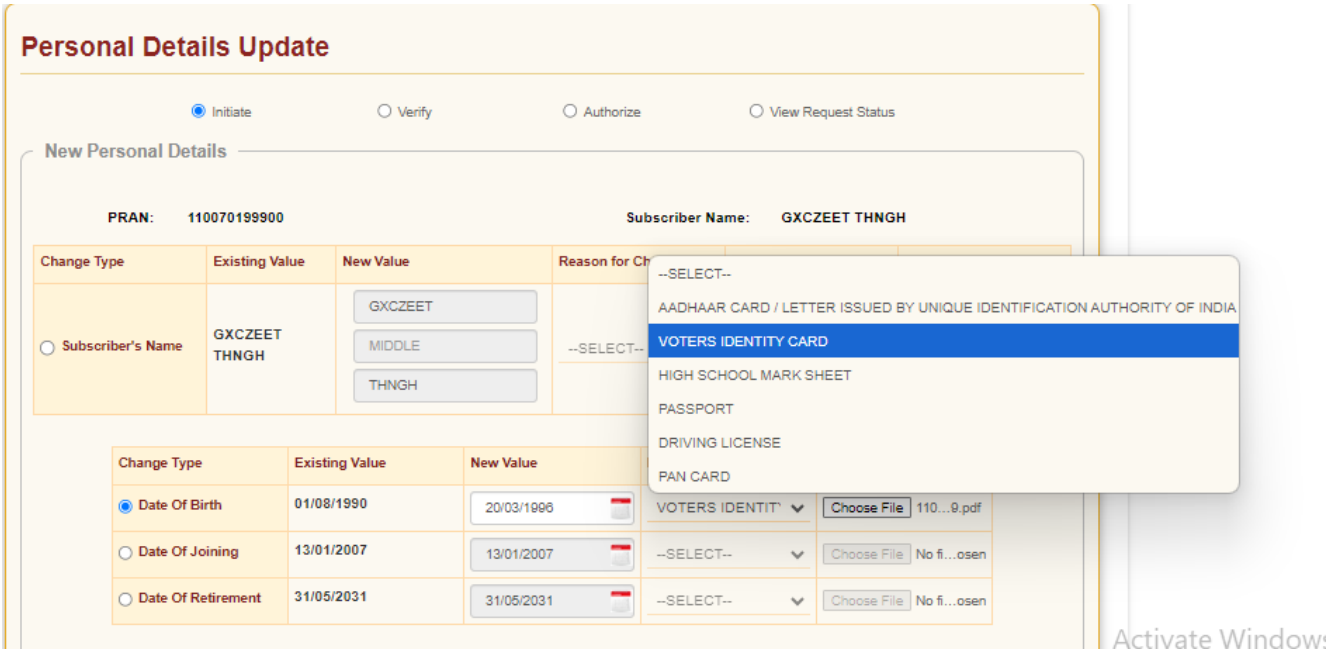


Figure 35

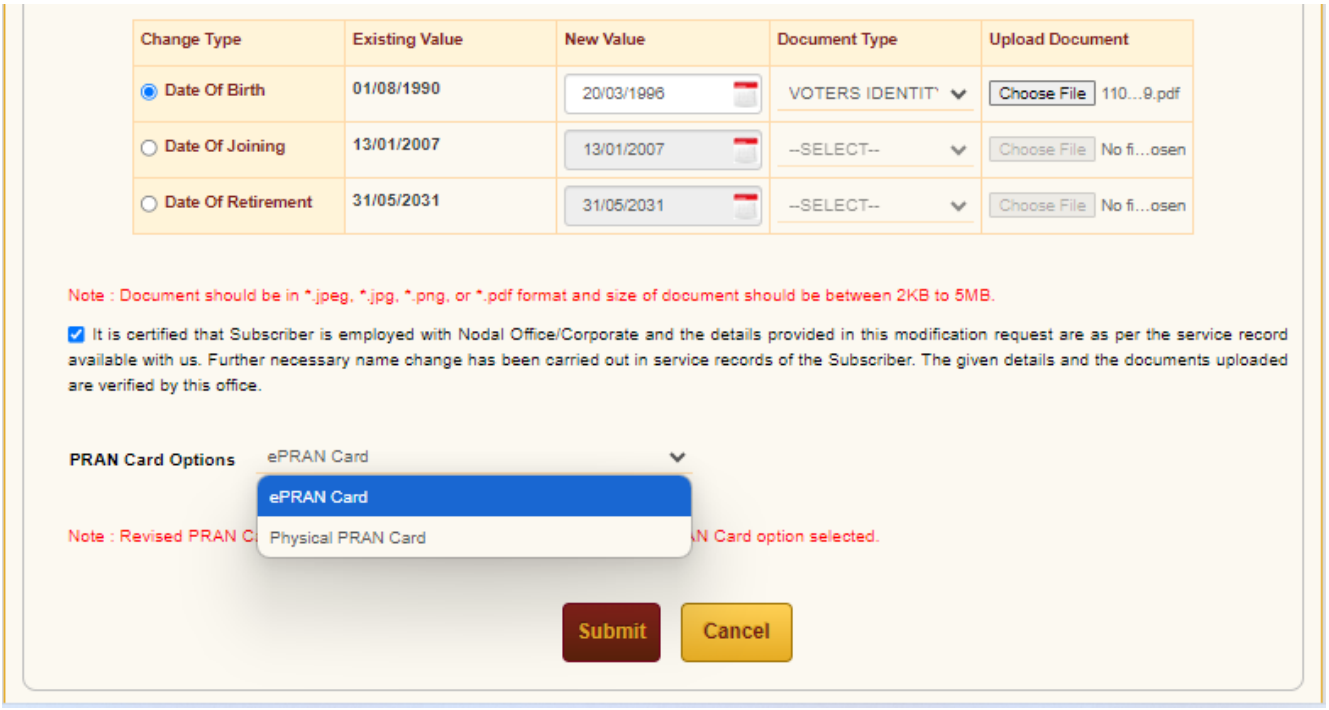


Figure 36

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

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

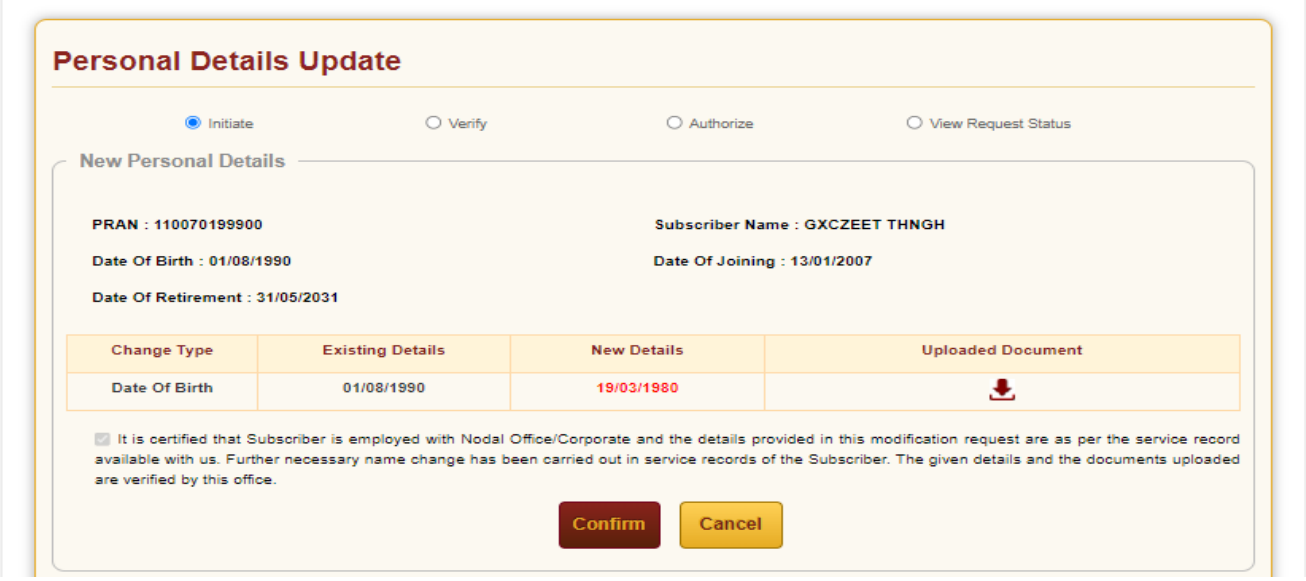


Figure 37

- Details will be saved successfully and acknowledgement number will be visible on screen. *(Please refer Figure 38).*

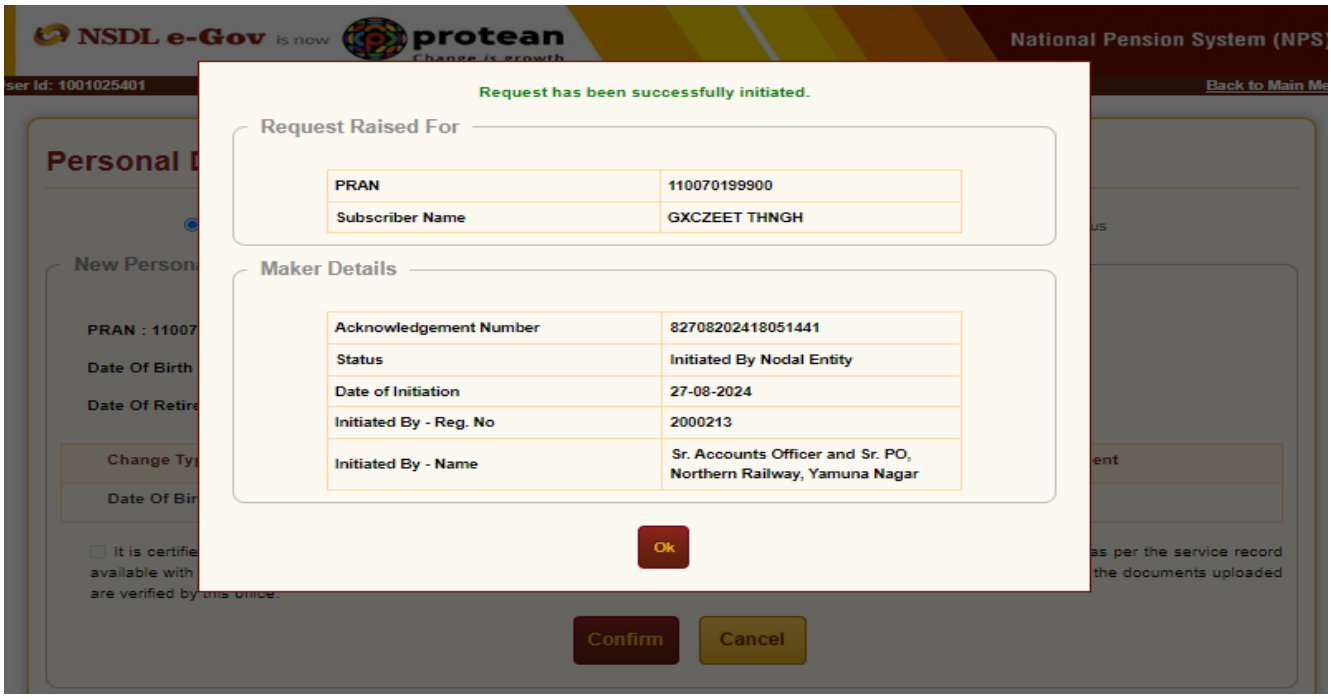


Figure 38

- Status of request can be seen in CRA log in. *(Please refer Figure 39).*

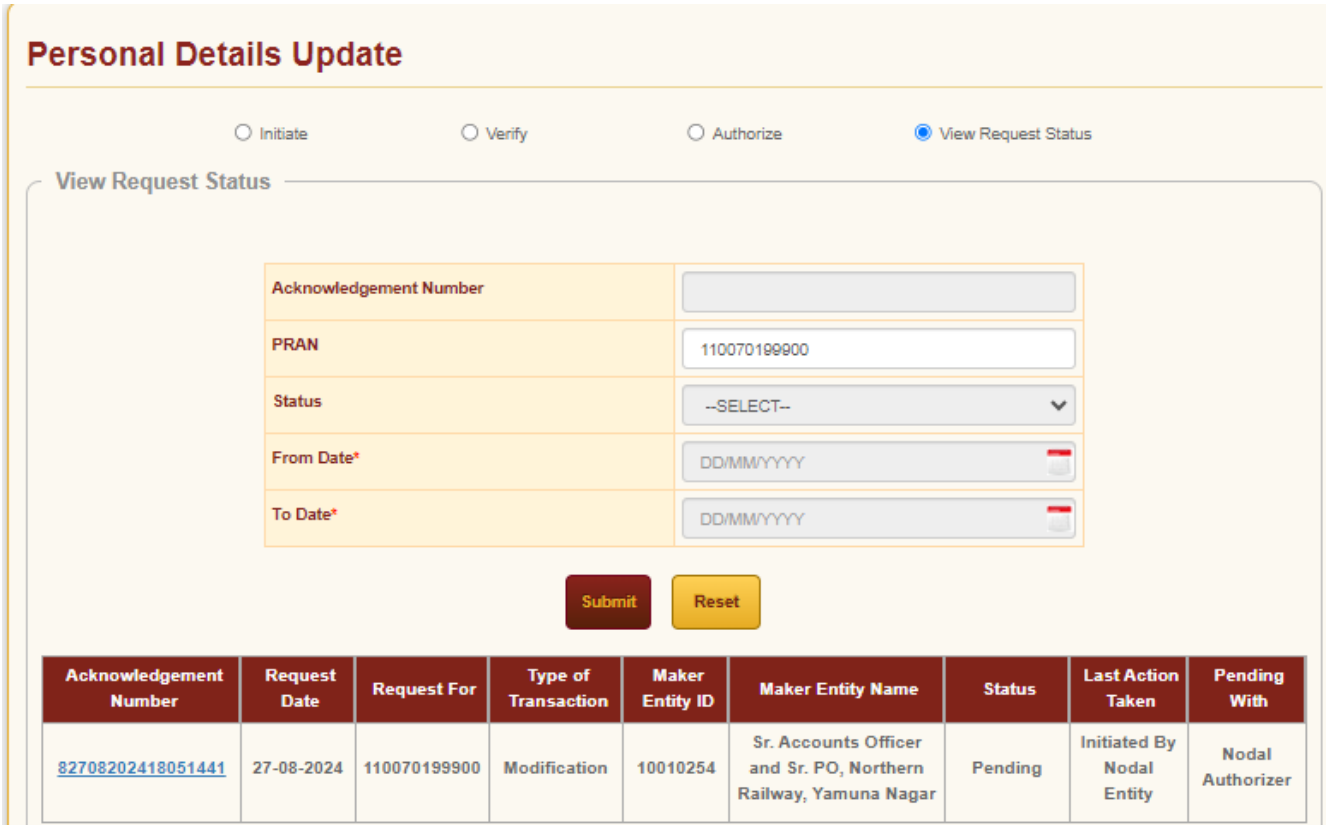


Figure 39

B. Authorization by PAO/DTO/PrAO/DTA Office

Date of Birth (DoB) change request Initiated by nodal office PAO/DTO/PrAO/DTA user 1 can be authorized by PAO/DTO PrAO/DTA nodal office User 2.

- PAO/DTO/PrAO/DTA office will log in to CRA portal https://cra-nsdl.com/CRA/. Enter **"User ID"** and password click on **"Submit"** *(Please refer Figure 40)*

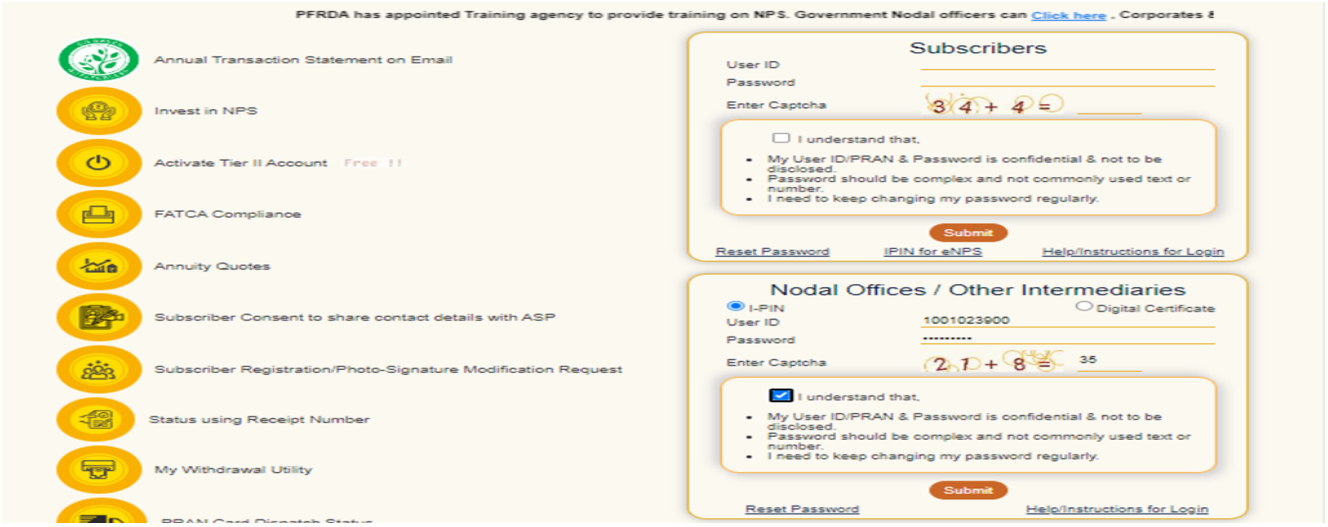


Figure 40

- Click on option **"Transaction"** and sub menu **"Subscriber Personal Details Update"** *(Please refer Figure 41)*

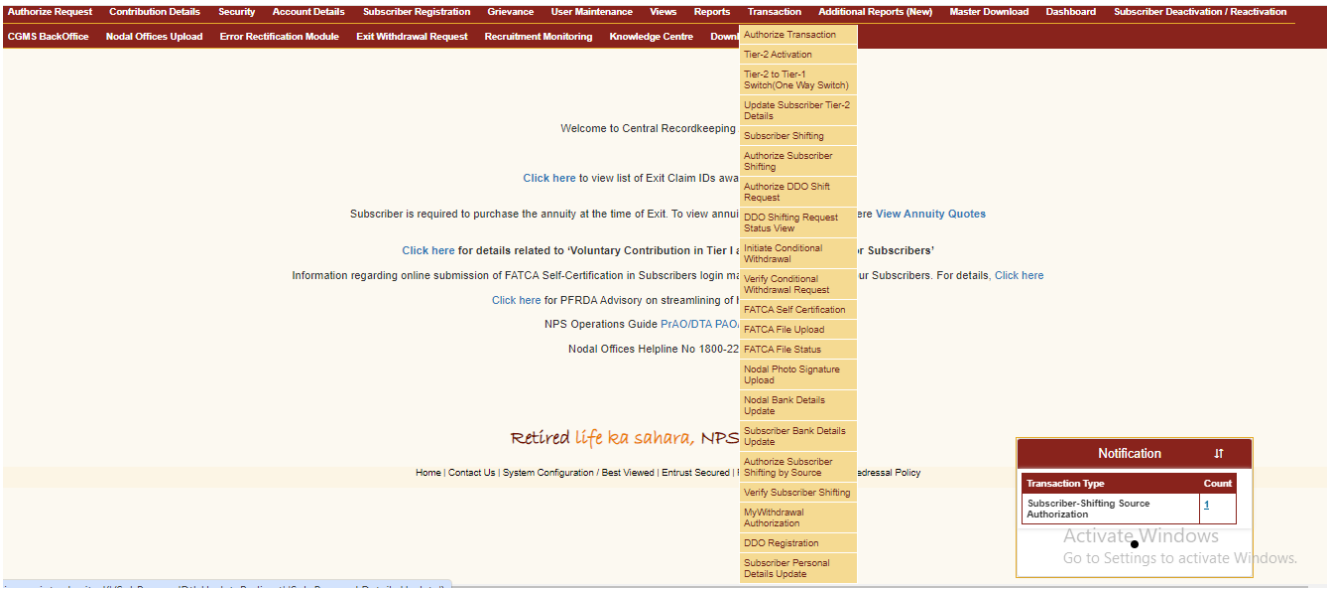


Figure 21

- Click on option **"Authorize"**, enter PRAN details and click on **"Submit"** *(Please refer Figure 42)*
  (In case request is initiate by DDO office PAO/DTO office needs to verify the same before authorization)

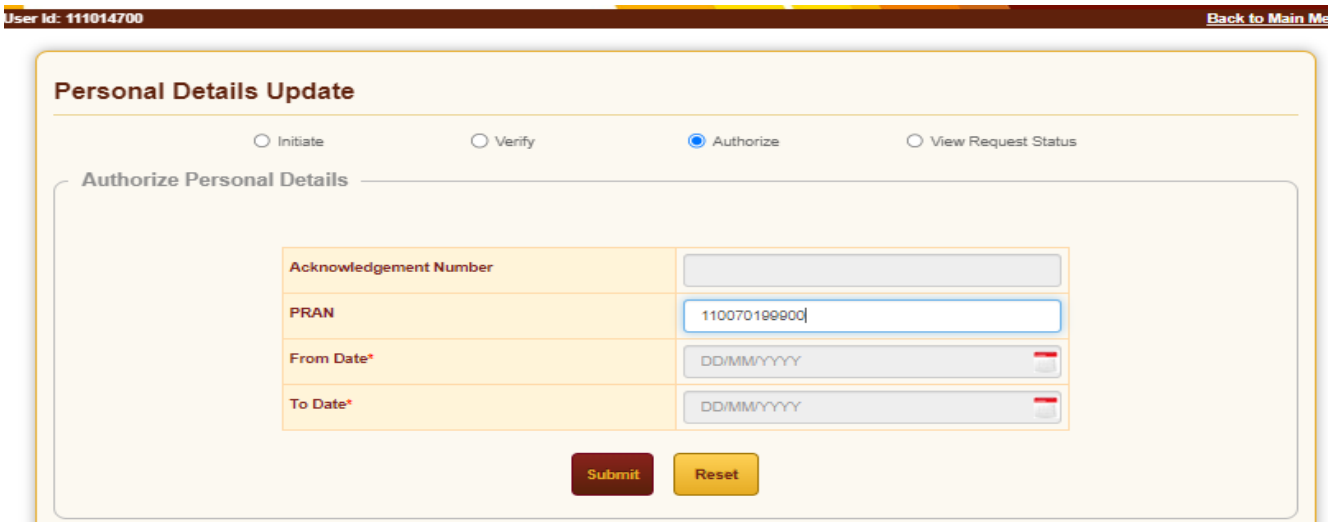


Figure 42

- 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 43)*

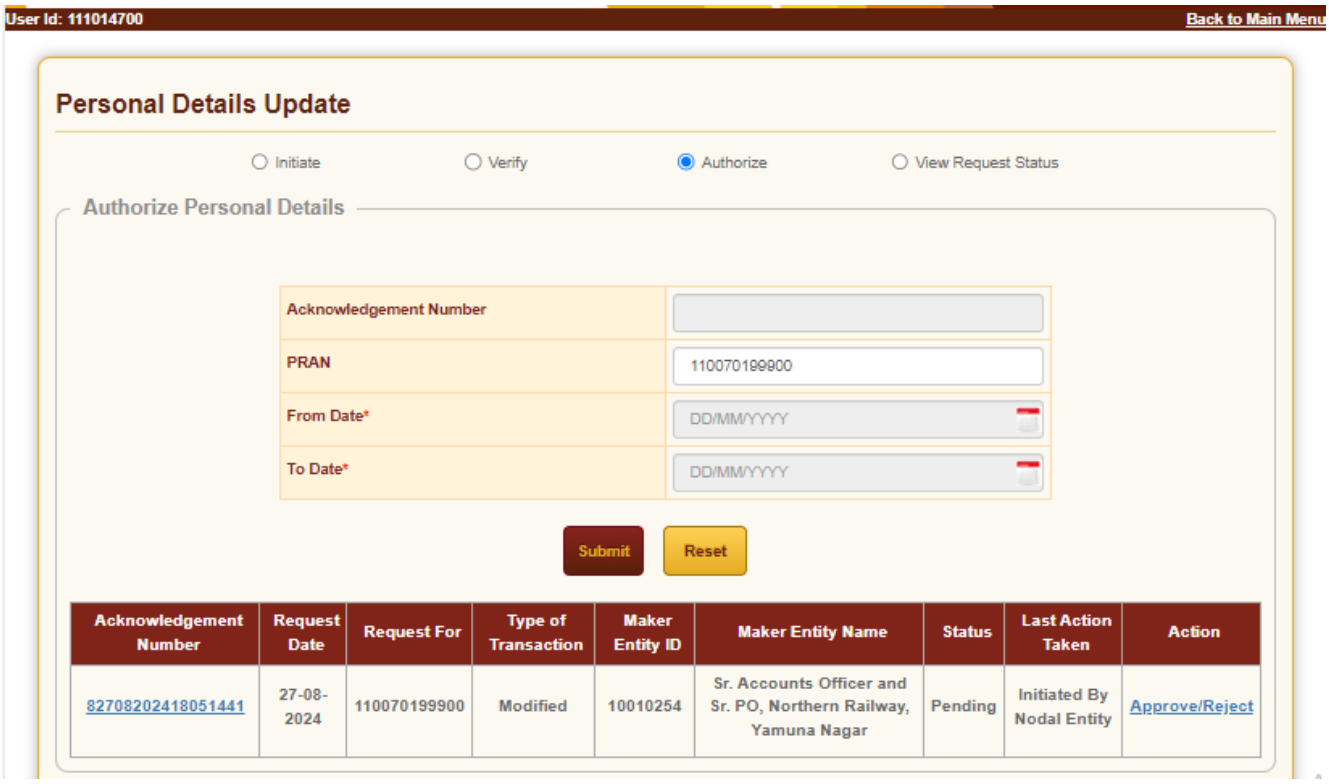


Figure 43

- The following details will appear on the screen (Refer figure 44)

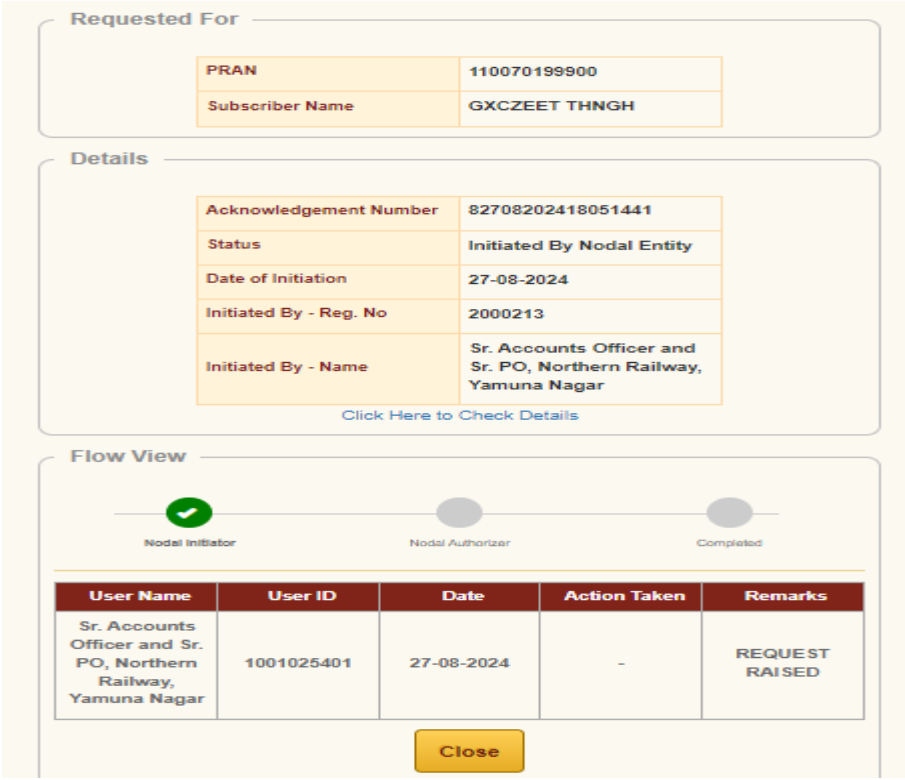


Figure 44

- Nodal office can download and see document uploaded by maker to check the details entered. Click on **"Confirm".** *(Please refer Figure 45 and 46).* ***It is the responsibility of the office to check veracity of documents as provided by the subscriber. Also, the office has to ensure that DoB to be updated is matching with service record of the office.***

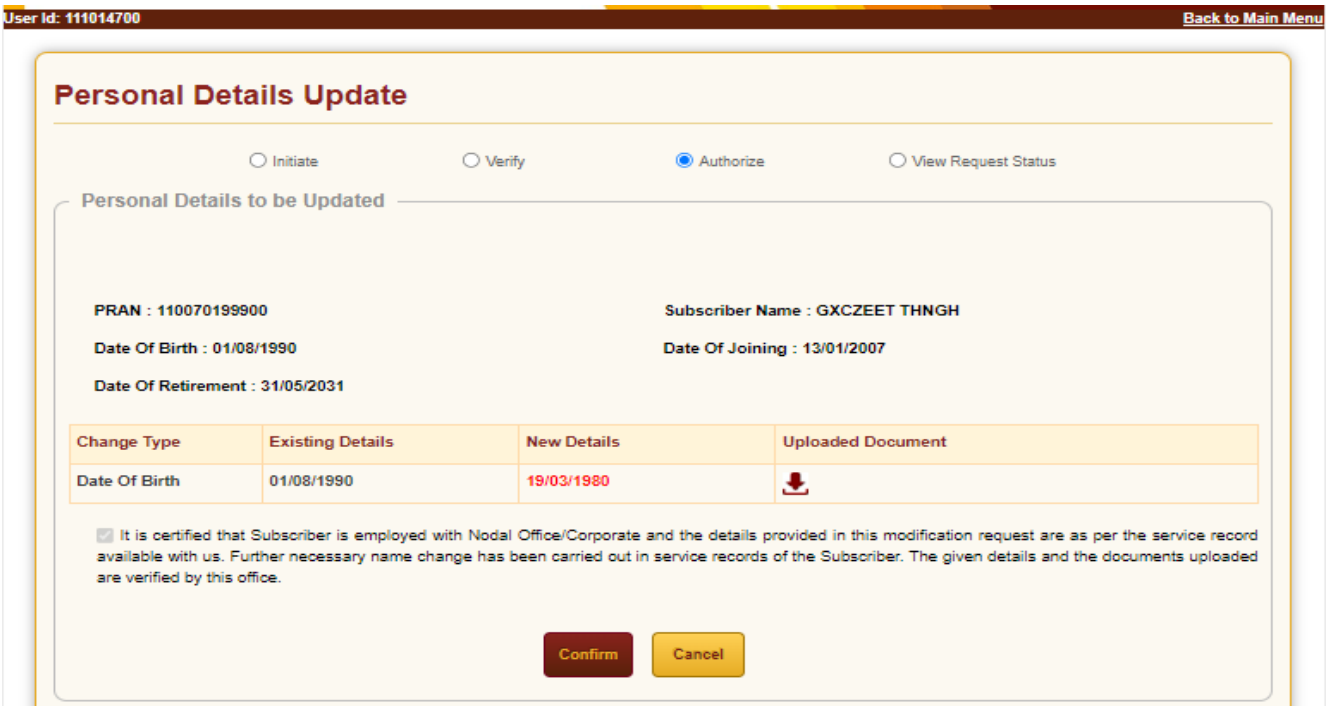


Figure 45

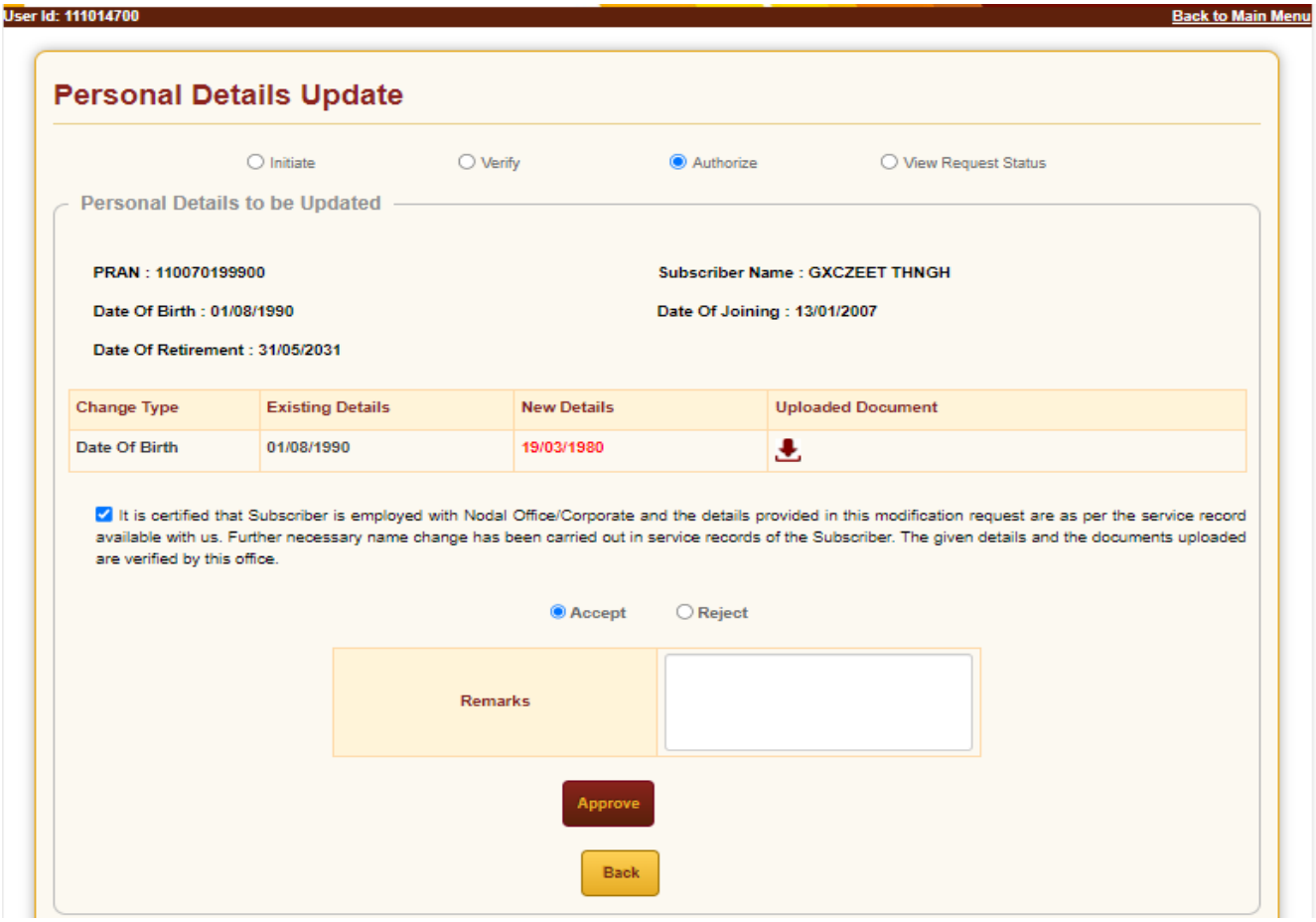


Figure 46

- The following screen will appear on successful authorization. *(Please refer Figure 47)*

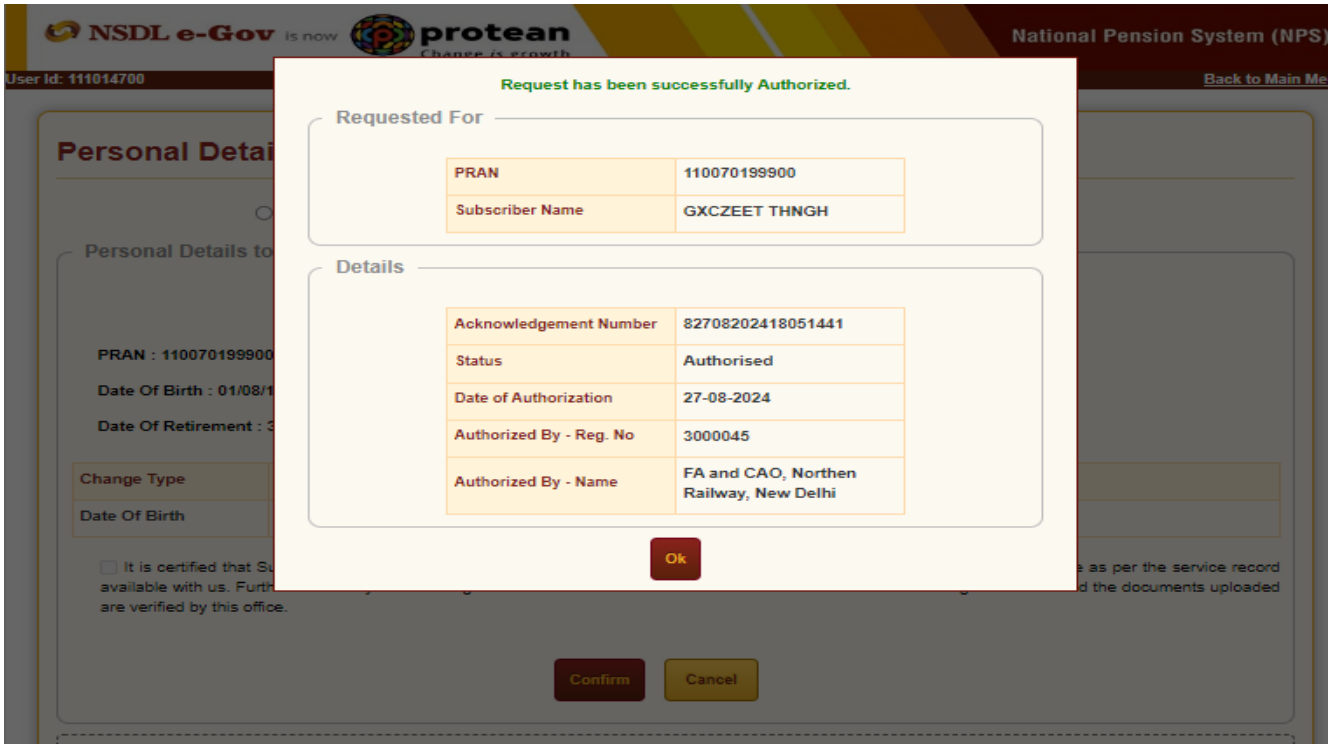


Figure 47

- Status of request can be seen in CRA log in. *(Please refer Figure 48).*

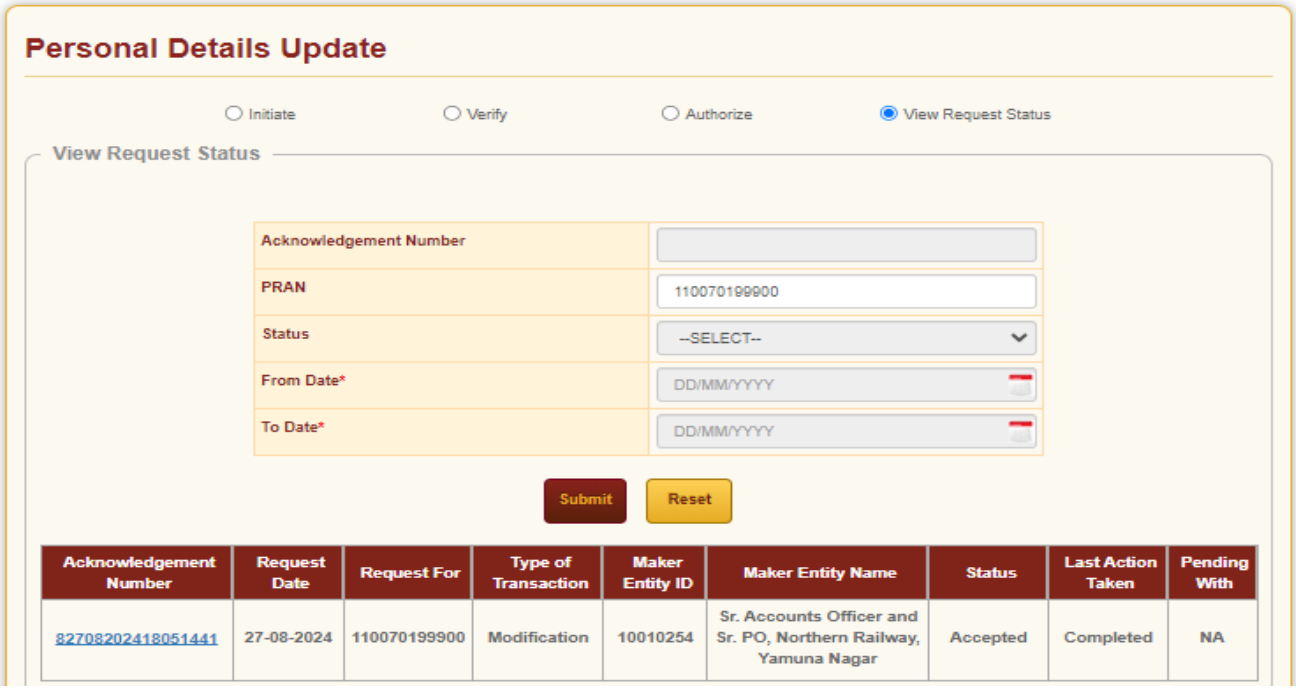


Figure 48

3. Date of Joining Change Request initiation by PAO/DTO/DDO

Date of Joining (DoJ) change request Initiated by **DDO** nodal office need to be **authorized** by PAO/DTO nodal office.

Date of Joining (DoJ) change request Initiated by nodal office PAO/DTO/PrAO/DTA user 1 can be authorized by PAO/DTO PrAO/DTA nodal office User 2.

A. Change Request initiation by PAO/DTO

- DDO/PAO office will log in to CRA portal https://cra-nsdl.com/CRA/. Enter **"User ID"** and password click on **"Submit"** *(Please refer Figure 49)*

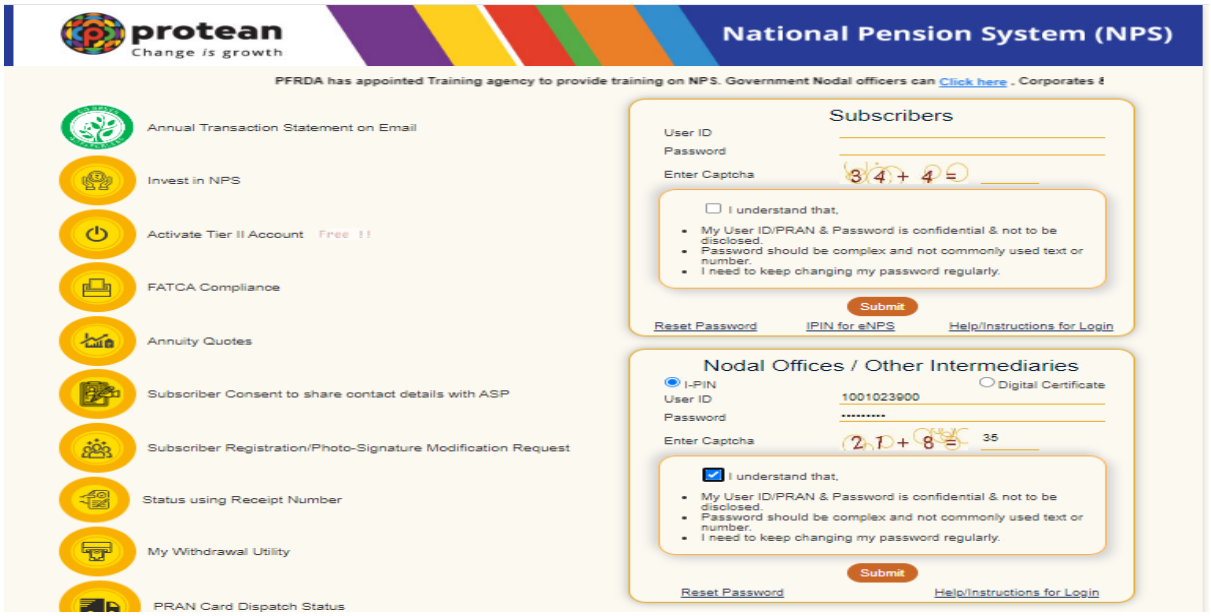


Figure 49

- Click on option **"Transaction"** and sub menu **"Subscriber Personal Details Update"** *(Please refer Figure 50)*

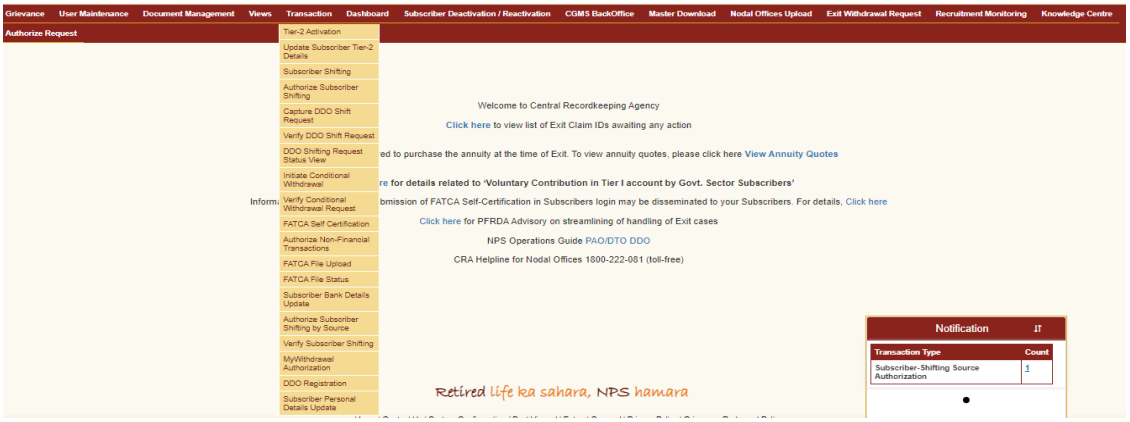


Figure 50

- Click on option **"Initiate"** and Enter PRAN. Click on **"Submit"** *(Please refer Figure 51)*

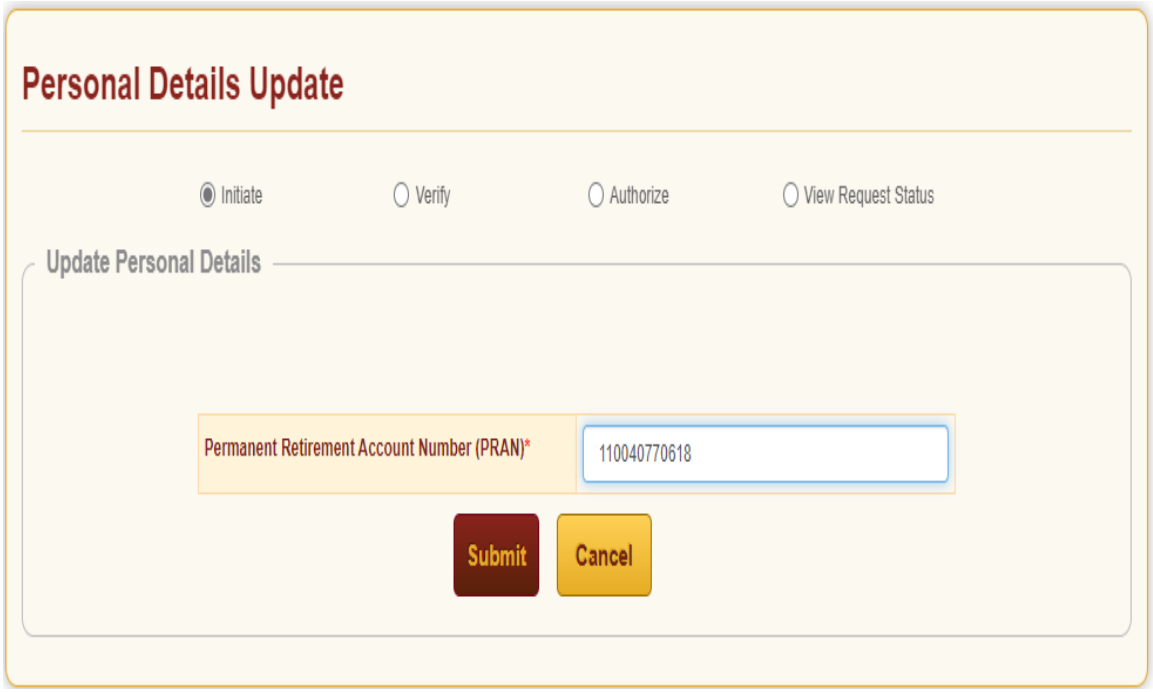


Figure 51

- CRA system will display current details present in given PRAN and to edit the same click on **"Edit"** *(Please refer Figure 52)*

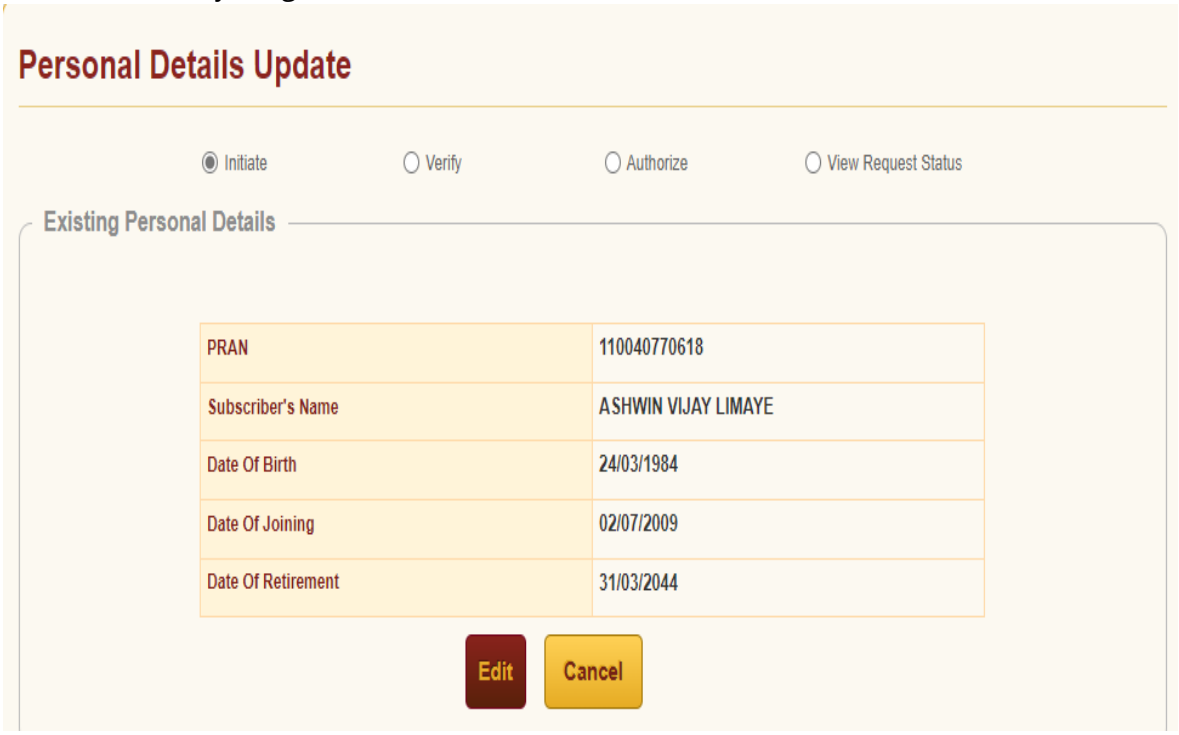


Figure 52

- Select the Change Type**, "Date of Joining".** Select supporting proof form available list and Upload document. Tick the declaration. Click on **"Submit"** *(Please refer Figure 53 and 54).* ***It is the responsibility of the office to check veracity of documents as provided by the subscriber. Also, the office has to ensure that DoJ to be updated is as per service record of the office***

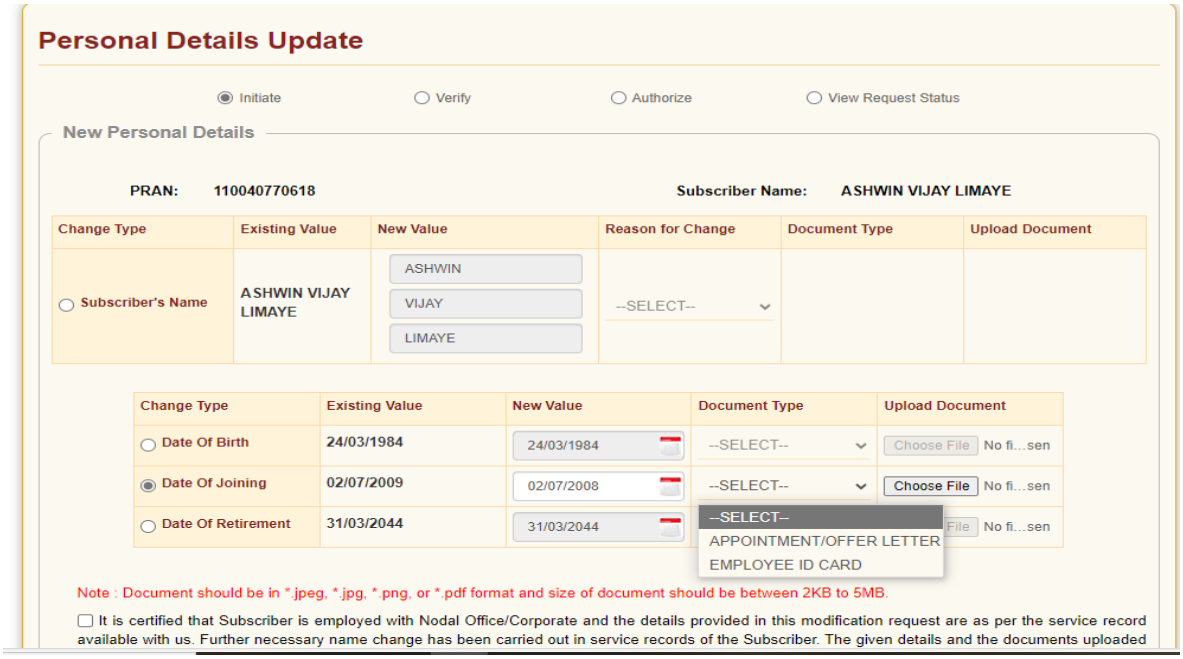


Figure 53

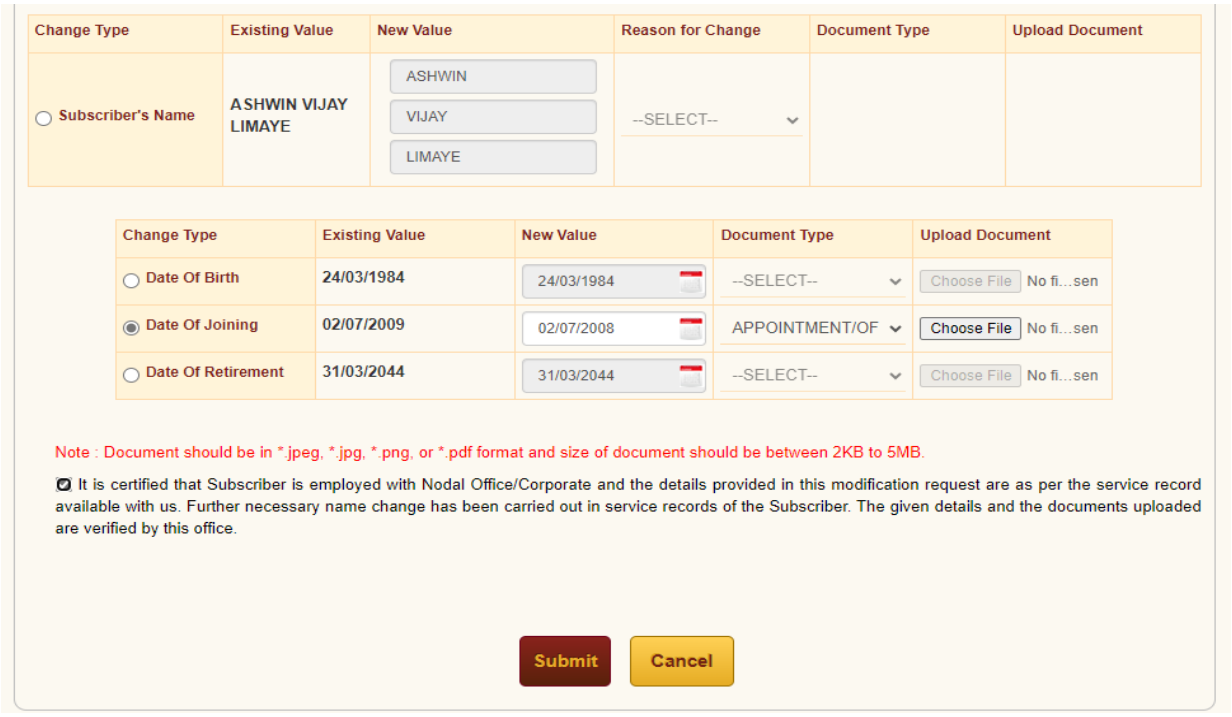


Figure 54

- Updated DoJ will be visible on screen click on "Confirm" to proceed. *(Please refer Figure 55).*

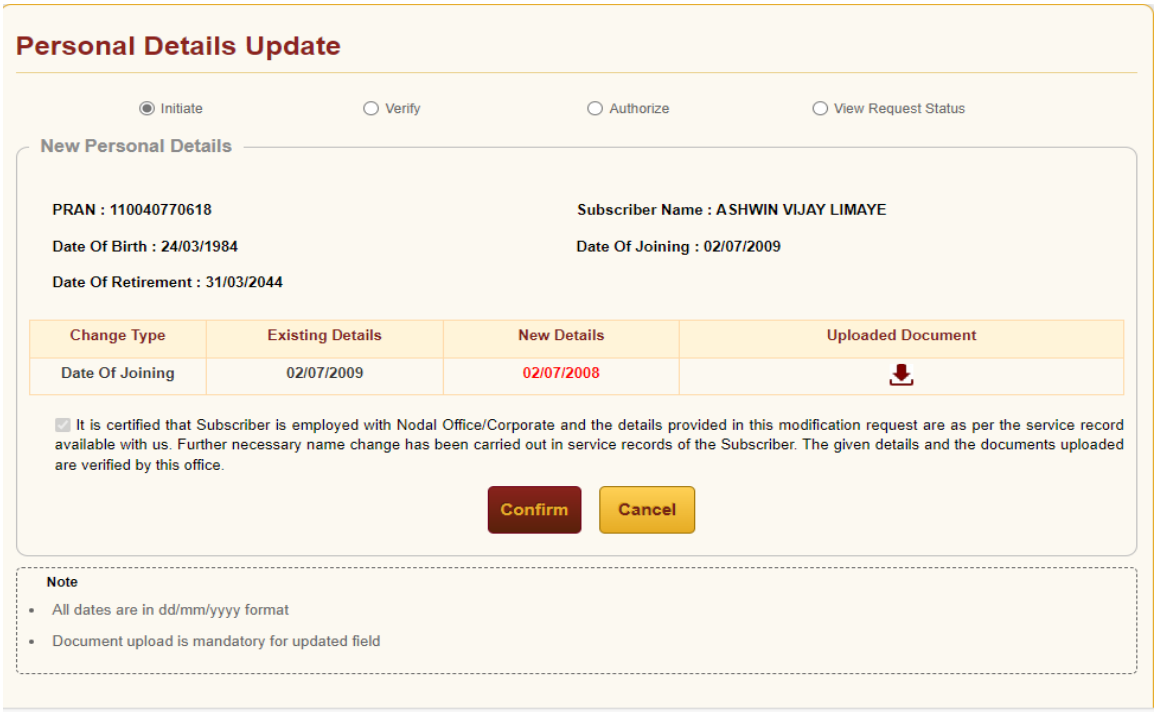


Figure 55

- Details will be saved successfully and acknowledgement number will be visible on screen.

  (Please refer Figure 56).

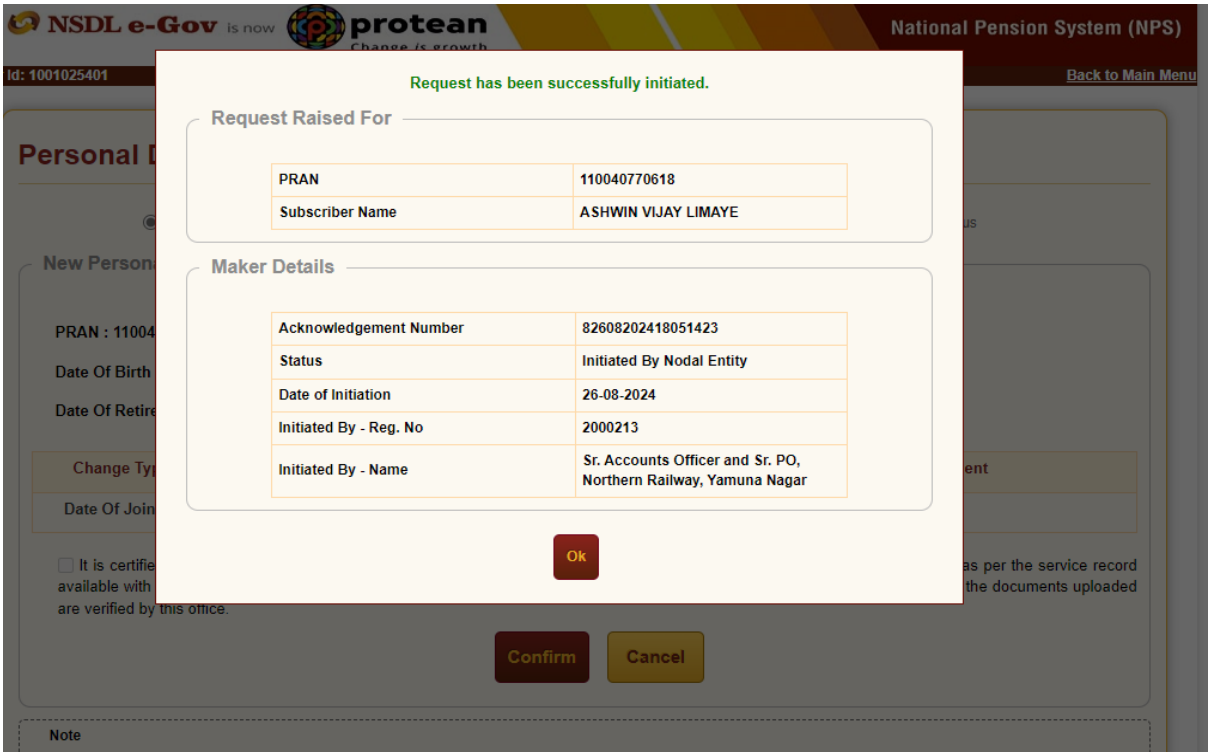


Figure 56

B. Authorization by PAO/DTO/PrAO/DTA Office

Date of Joining (DoJ) change request Initiated by nodal office PAO/DTO/PrAO/DTA user 1 can be authorized by PAO/DTO PrAO/DTA nodal office User 2. PAO/DTO/PrAO/DTA office will log in to CRA portal https://cra-nsdl.com/CRA/. Enter **"User ID"** and password click on **"Submit"** *(Please refer Figure 57)*

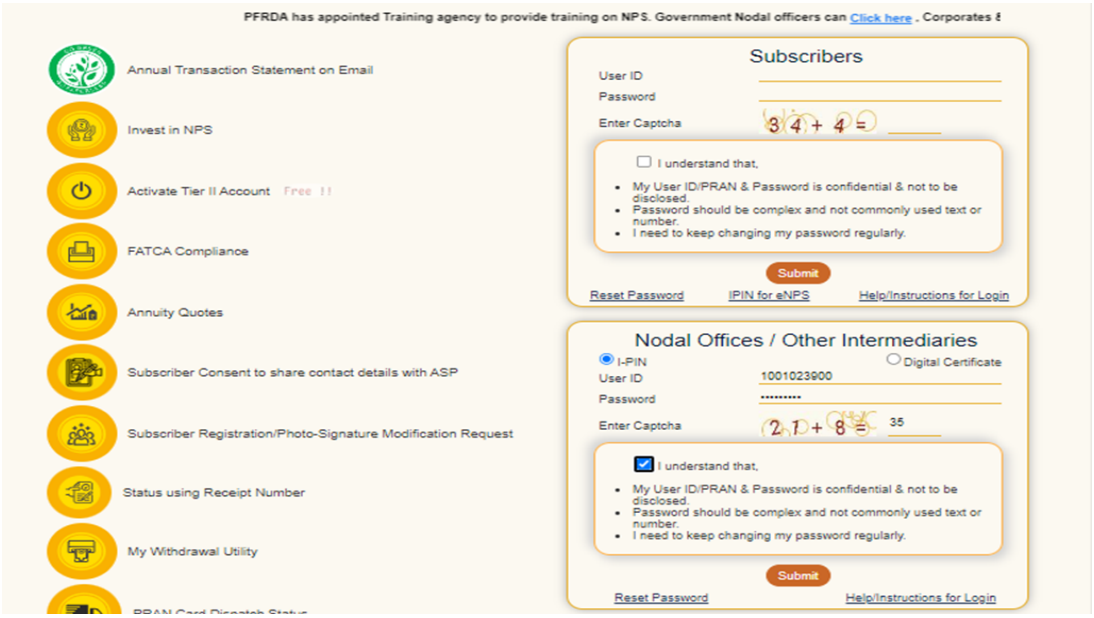


Figure 57

Click on option **"Transaction"** and sub menu **"Subscriber Personal Details Update"** *(Please refer Figure 58)*

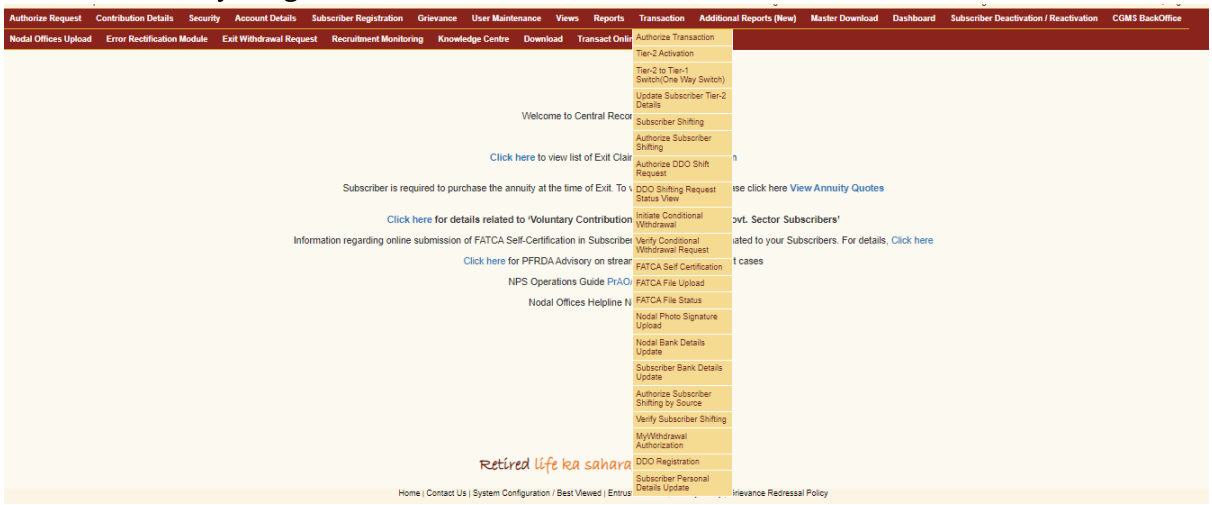


Figure 58

- Click on option **"Authorize"**, enter PRAN details and click on **"Submit"** *(Please refer Figure 59)*

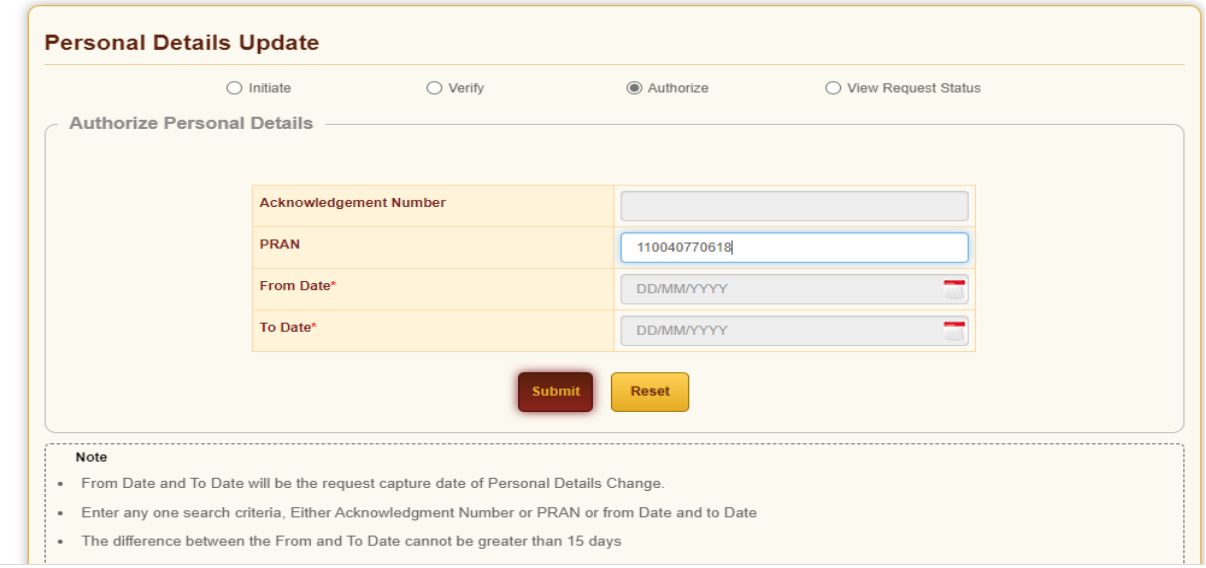


Figure 59

- Existing details pending for authorization will be available on screen. Click on hyperlink **acknowledgement number** to check the details entered by maker. Nodal office can download and see document uploaded by maker to check the details entered. Click on **"Accept".** Also tick declaration *(Please refer figure 60 and 61)*

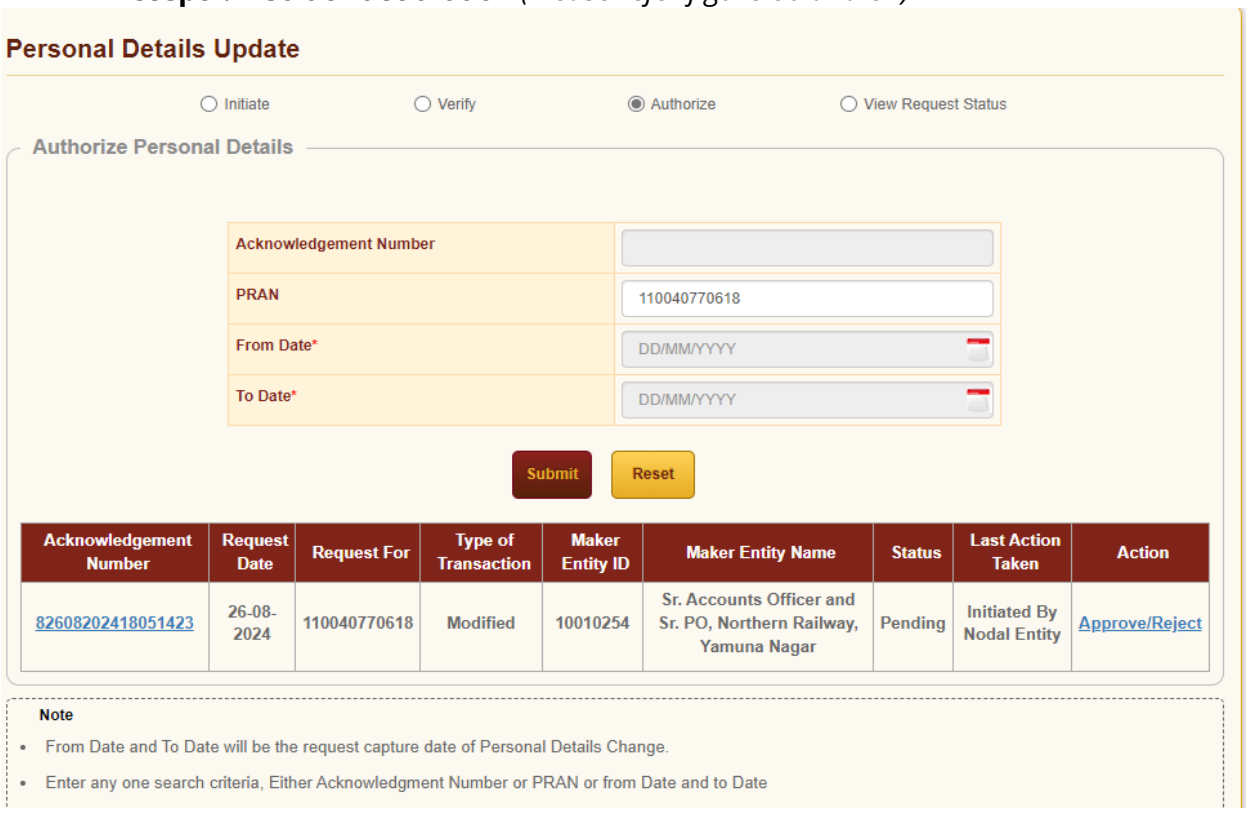


Figure 60

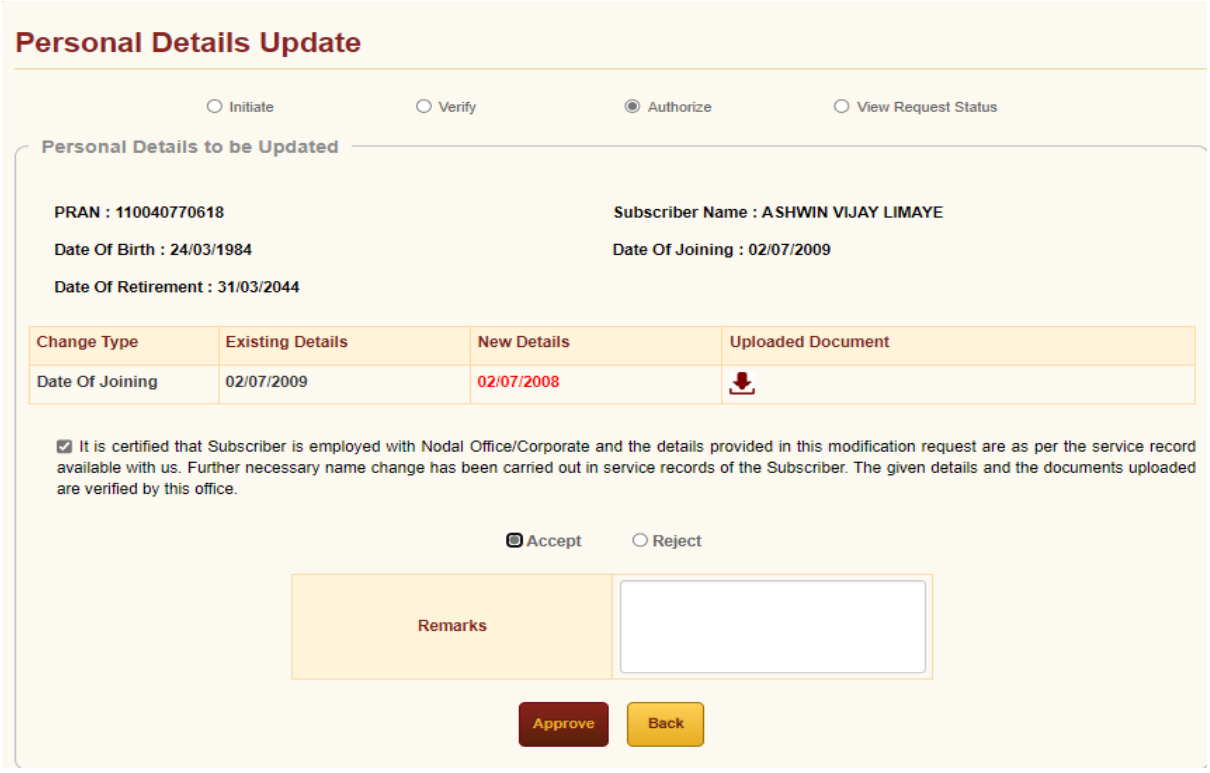


Figure 61

➢ Nodal office needs to verify confirmation screen and Click on "Confirm" (Please refer figure 62). ***It is the responsibility of the office to check veracity of documents as provided by the subscriber. Also, the office has to ensure that DoJ to be updated is as per service record of the office***

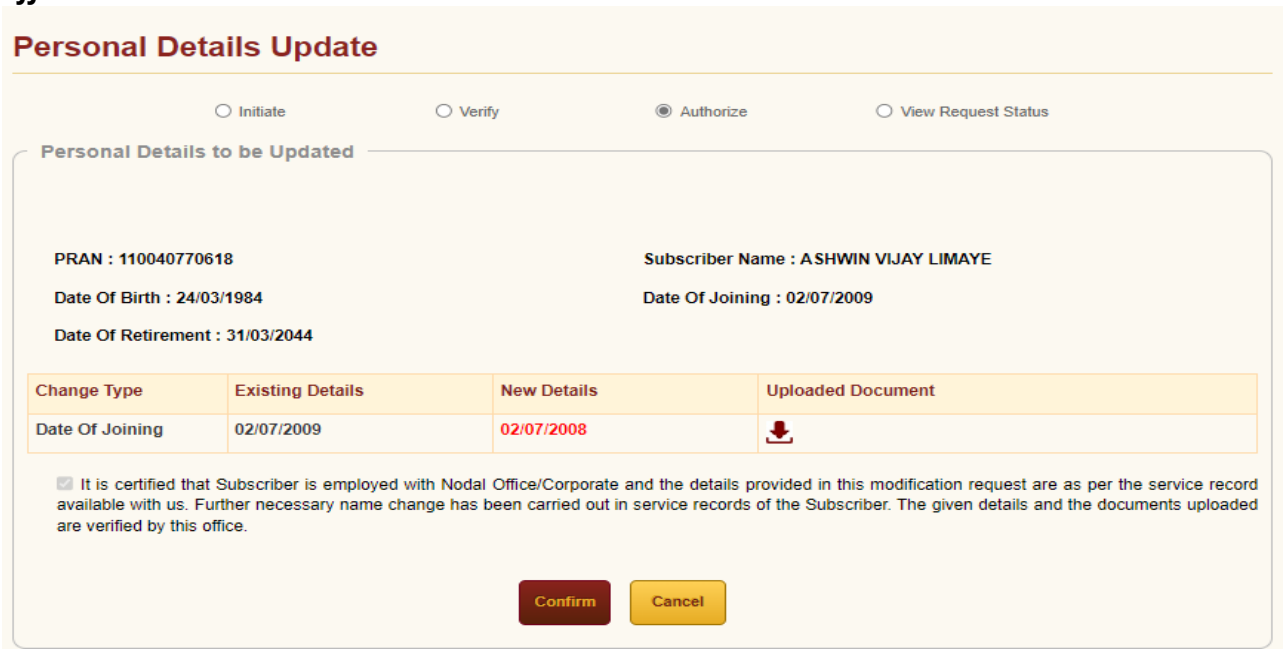


Figure 62

- The following screen will appear on successful authorization. *(Please refer Figure 63)*

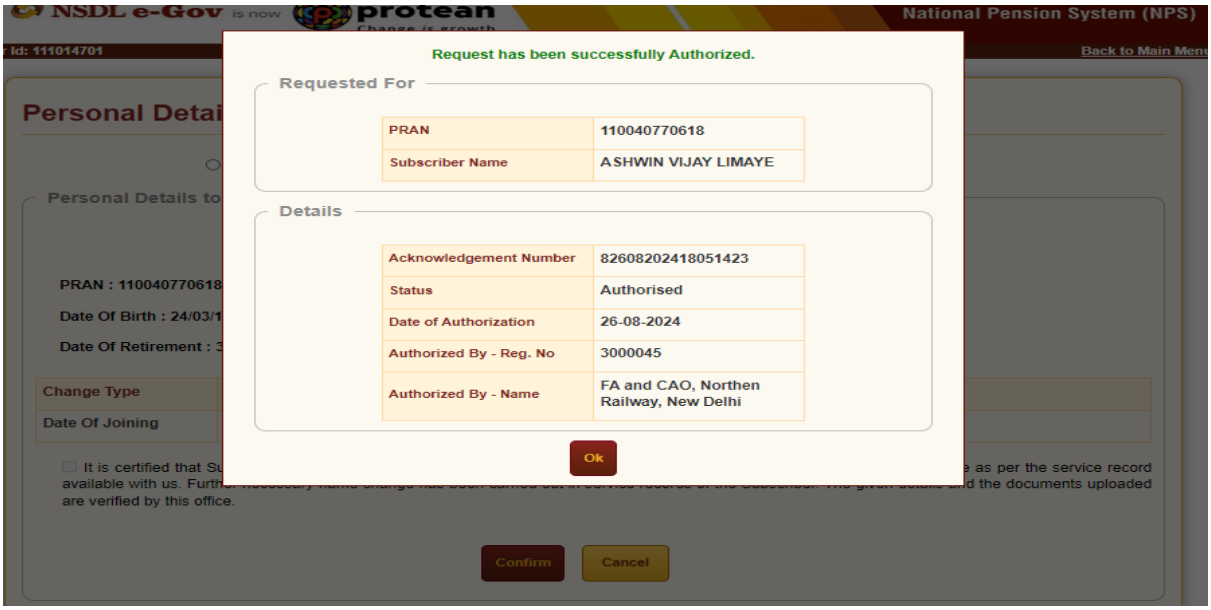
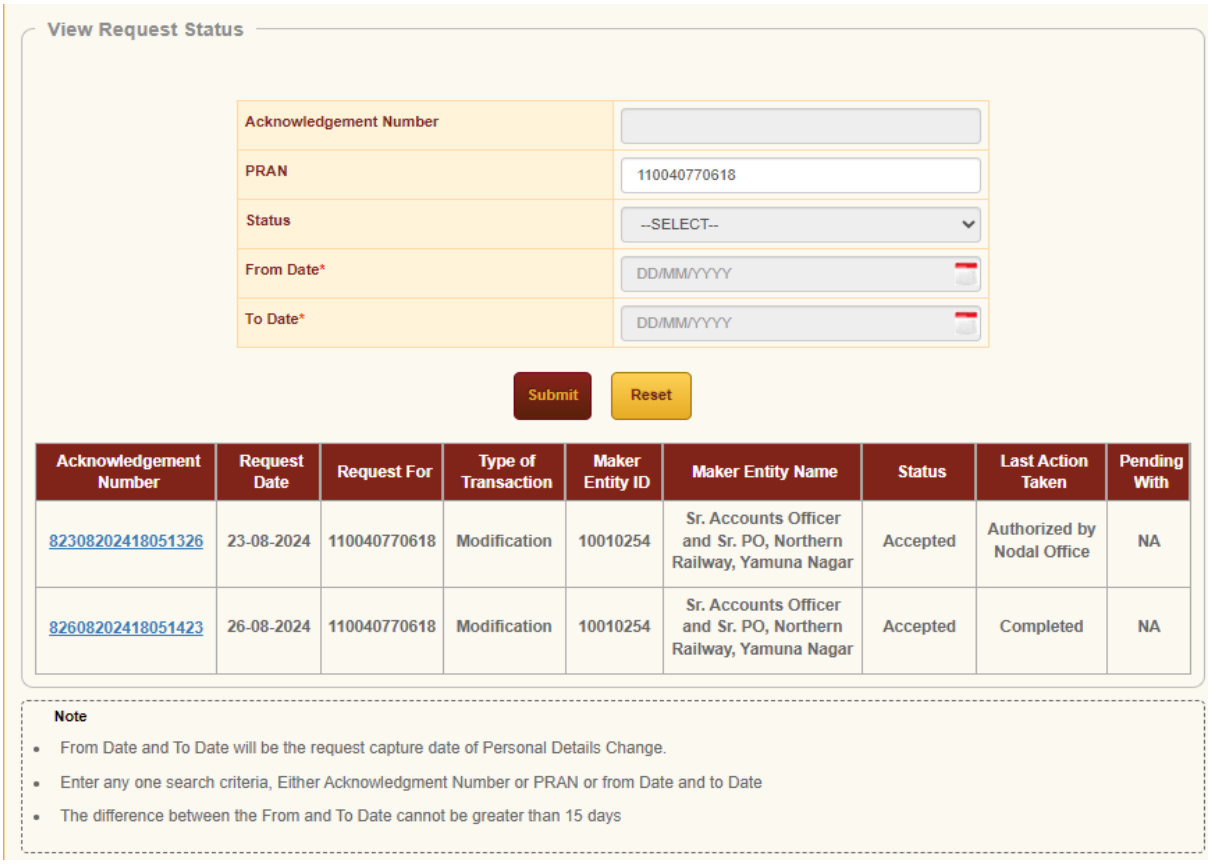


Figure 63

- Status of request can be seen in CRA log in. *(Please refer Figure 64).*



Acknowledgement Number	Request Date	Request For	Type of Transaction	Maker Entity ID	Maker Entity Name	Status	Last Action Taken	Pending With
82308202418051326	23-08-2024	110040770618	Modification	10010254	Sr. Accounts Officer and Sr. PO, Northern Railway, Yamuna Nagar	Accepted	Authorized by Nodal Office	NA
82608202418051423	26-08-2024	110040770618	Modification	10010254	Sr. Accounts Officer and Sr. PO, Northern Railway, Yamuna Nagar	Accepted	Completed	NA

Figure 64

4. Modification in Date of Retirement:

Date of Retirement (DoR) change request Initiated by **DDO** nodal office need to be **authorized** by PAO/DTO nodal office.

Date of Retirement (DoR) change request Initiated by nodal office PAO/DTO/PrAO/DTA user 1 can be authorized by PAO/DTO PrAO/DTA nodal office User 2.

A. Change Request initiation by PAO/DTO

- DDO/PAO office will log in to CRA portal https://cra-nsdl.com/CRA/. Enter **"User ID"** and password click on **"Submit"** *(Please refer Figure 65)*

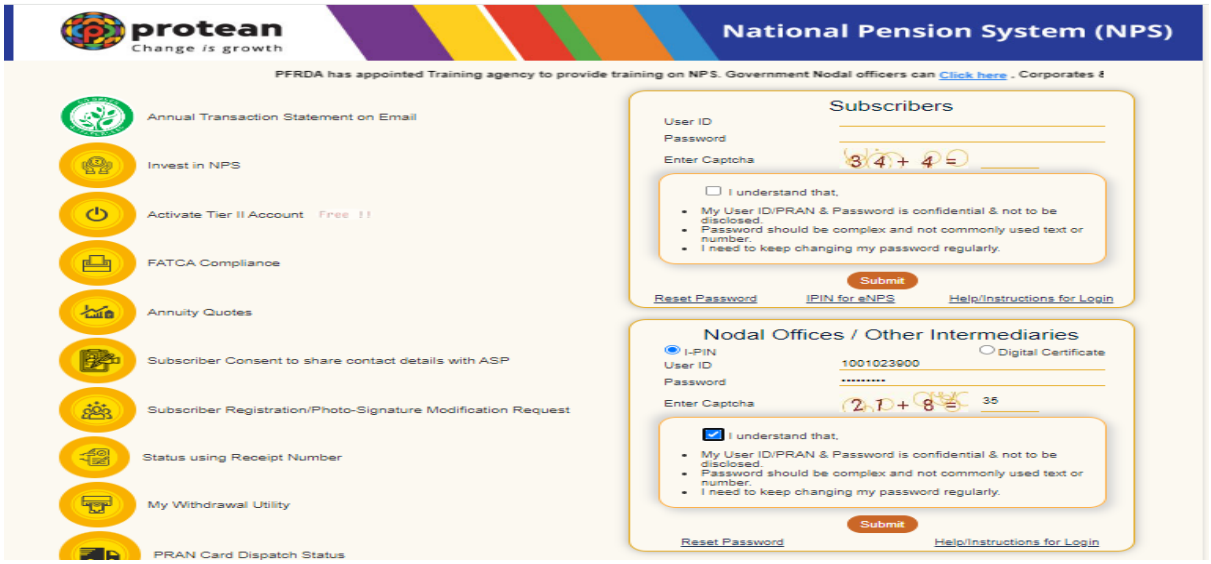


Figure 65

- Click on option **"Transaction"** and sub menu **"Subscriber Personal Details Update"** *(Please refer Figure 66)*

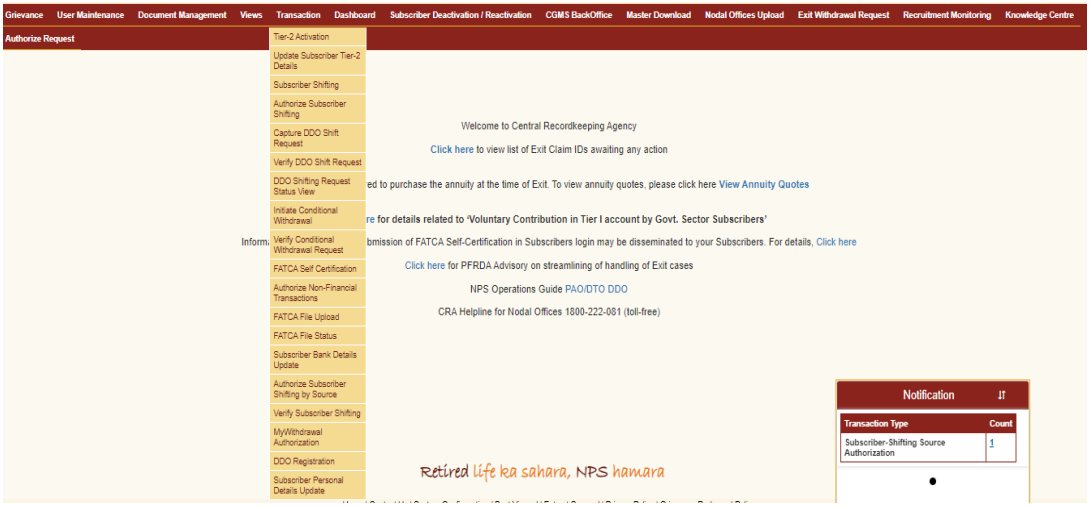


Figure 66

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

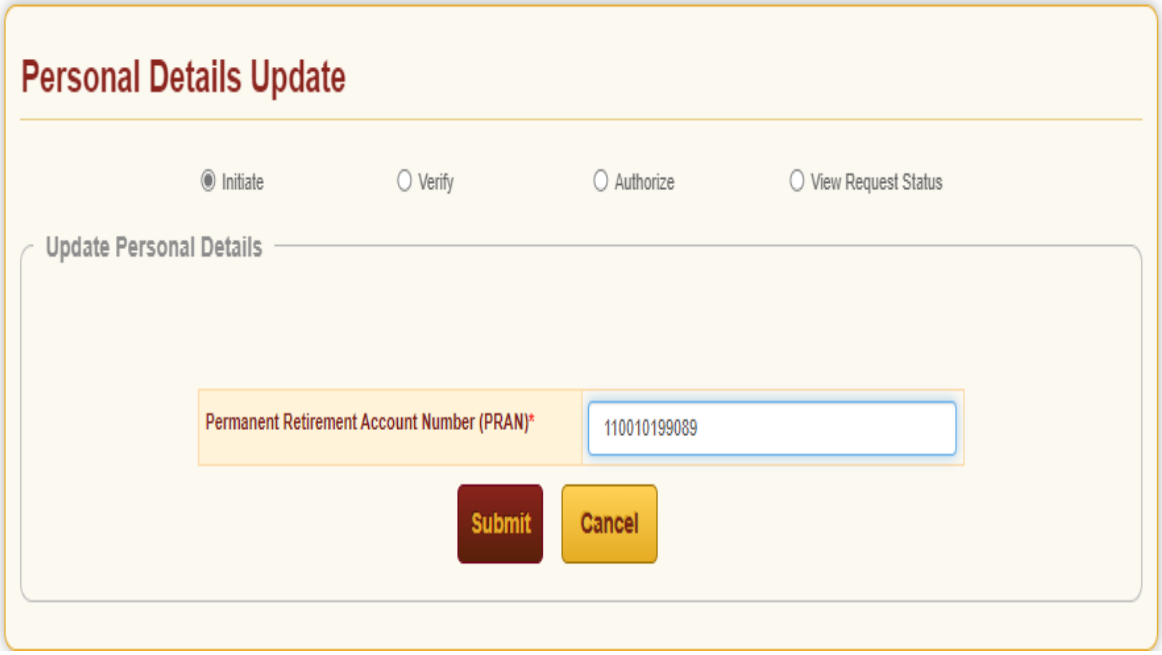


Figure 67

- CRA system will display current details present in given PRAN and to edit the same click on **"Edit"** *(Please refer Figure 68)*

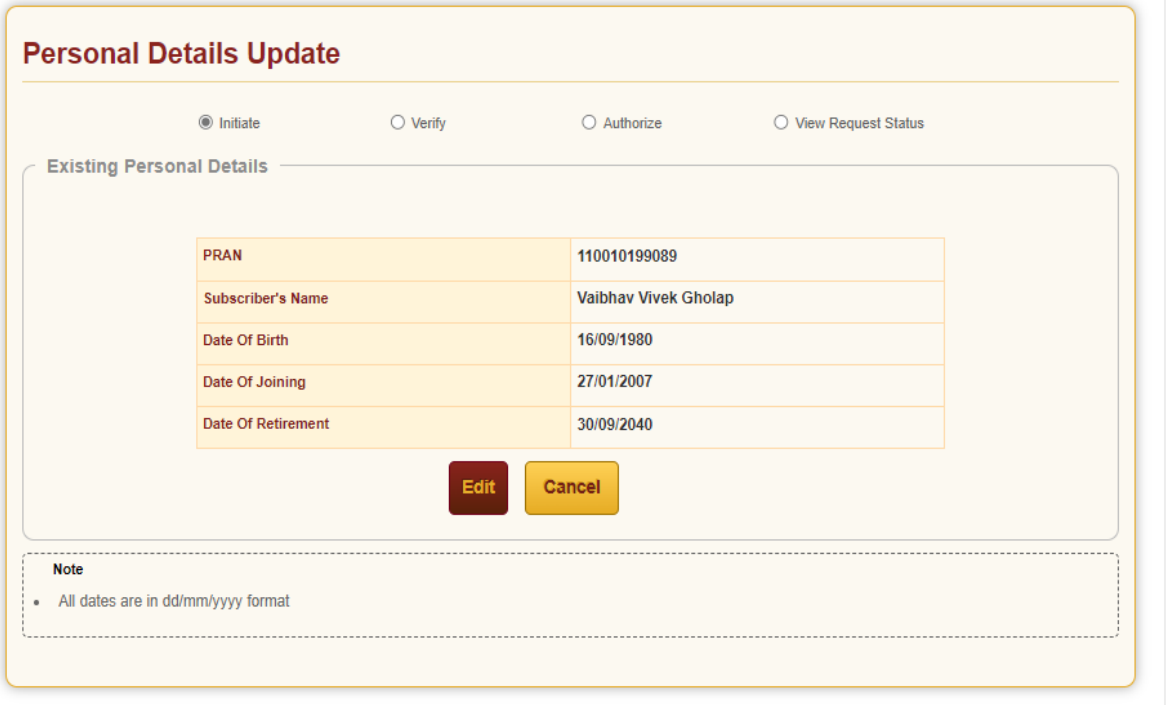


Figure 68

- Select the Change Type **as "Date of Retirement".** Select supporting proof form available list and Upload document. Tick the declaration. Click on **"Submit"** *(Please refer Figure 69 and 70).* ***It is the responsibility of the office to check veracity of documents as provided by the subscriber. Also, the office has to ensure that DoR to be updated is as per service record of the office***

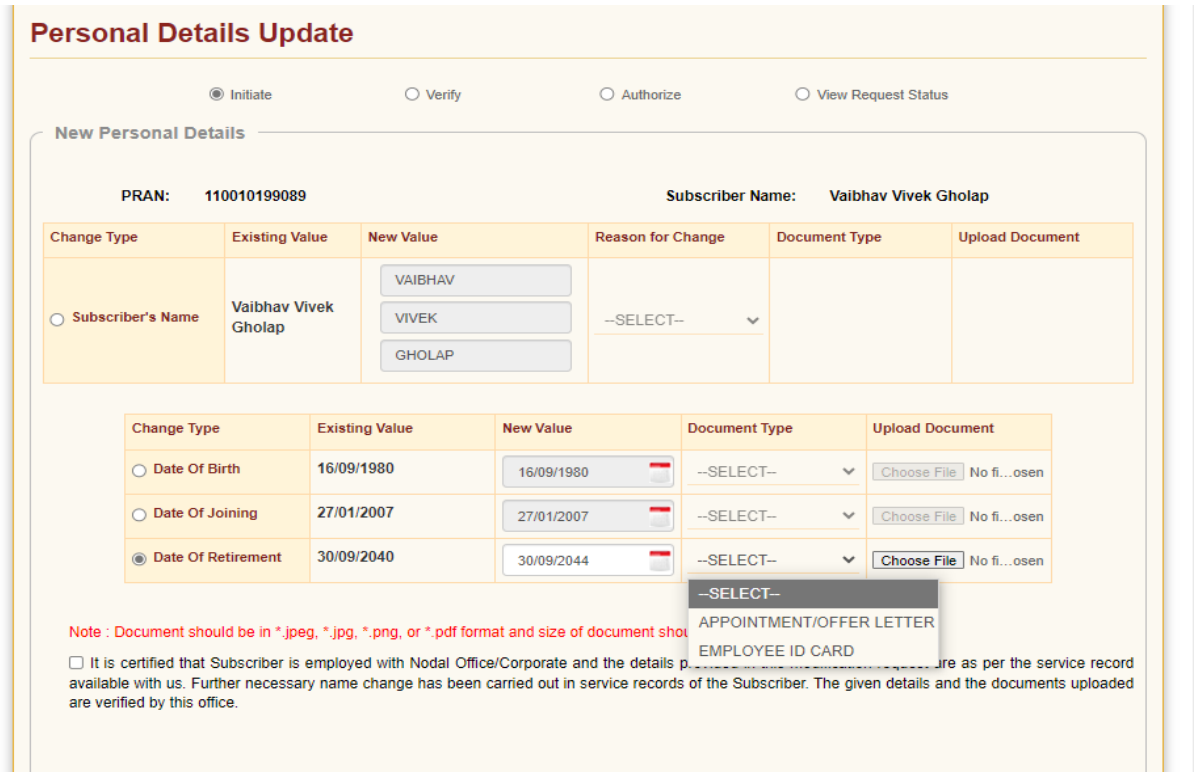


Figure 69

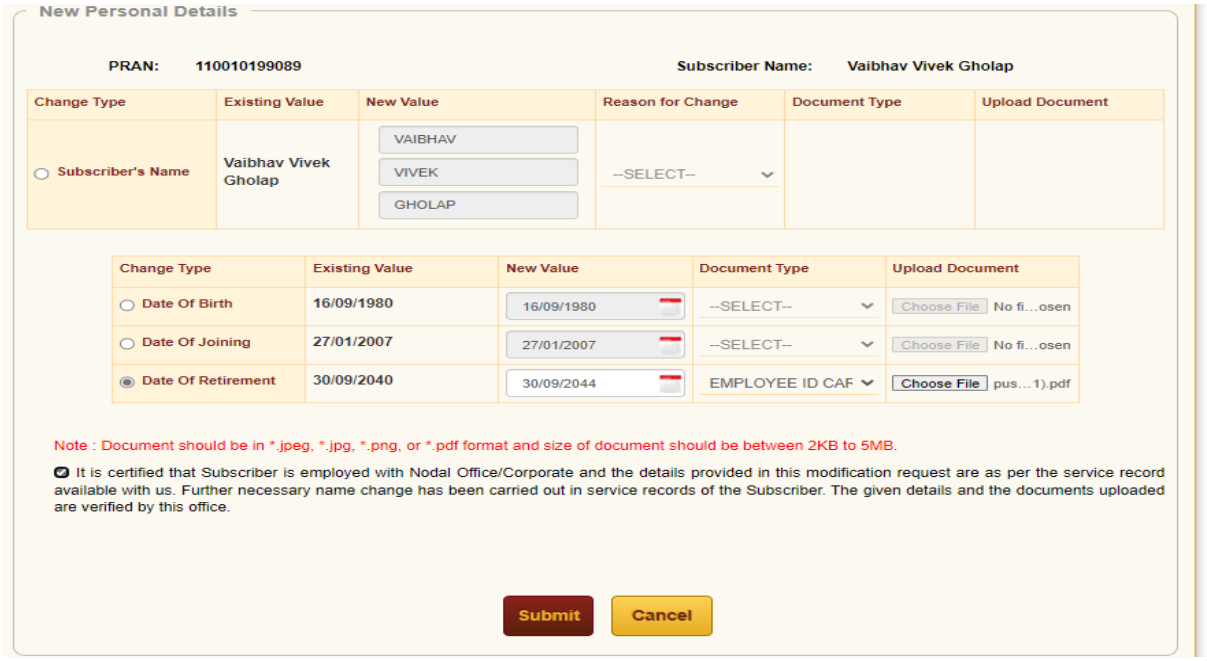


Figure 70

- Updated DoR will be visible on screen click on "Confirm" to proceed. *(Please refer Figure 71).*

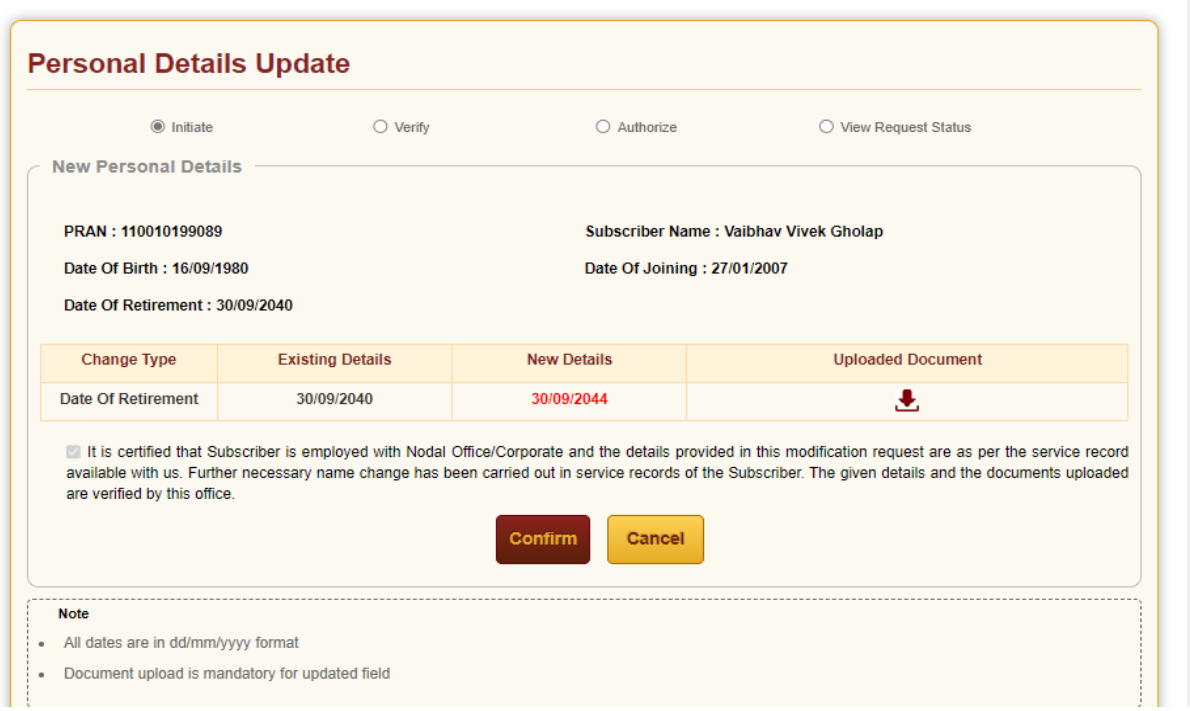


Figure 71

- Details will be saved successfully and acknowledgement number will be visible on screen. *(Please refer Figure 72).*

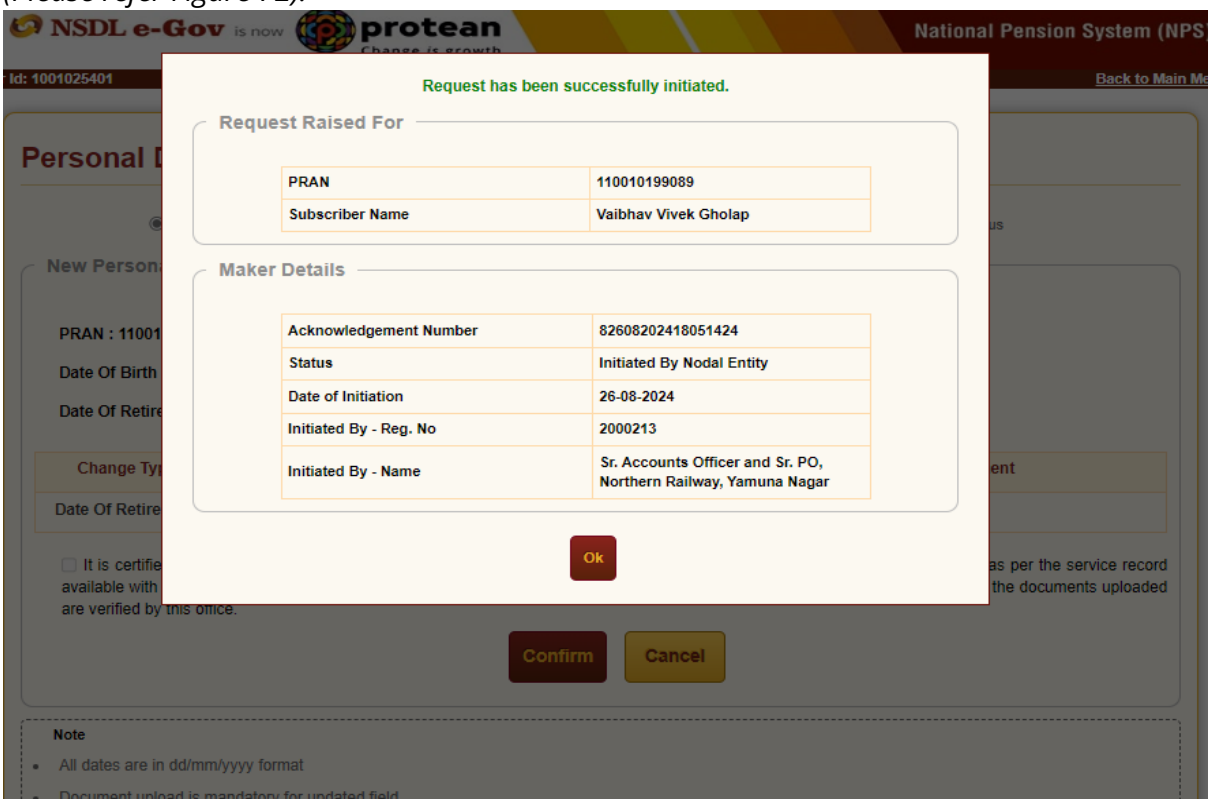


Figure 72

B. Authorization by PAO/DTO/PrAO/DTA Office

Date of Retirement (DoR) change request Initiated by nodal office PAO/DTO/PrAO/DTA user 1 can be authorized by PAO/DTO PrAO/DTA nodal office User 2. PAO/DTO/PrAO/DTA office will log in to CRA portal https://cra-nsdl.com/CRA/. Enter **"User ID"** and password click on **"Submit"** *(Please refer Figure 73)*

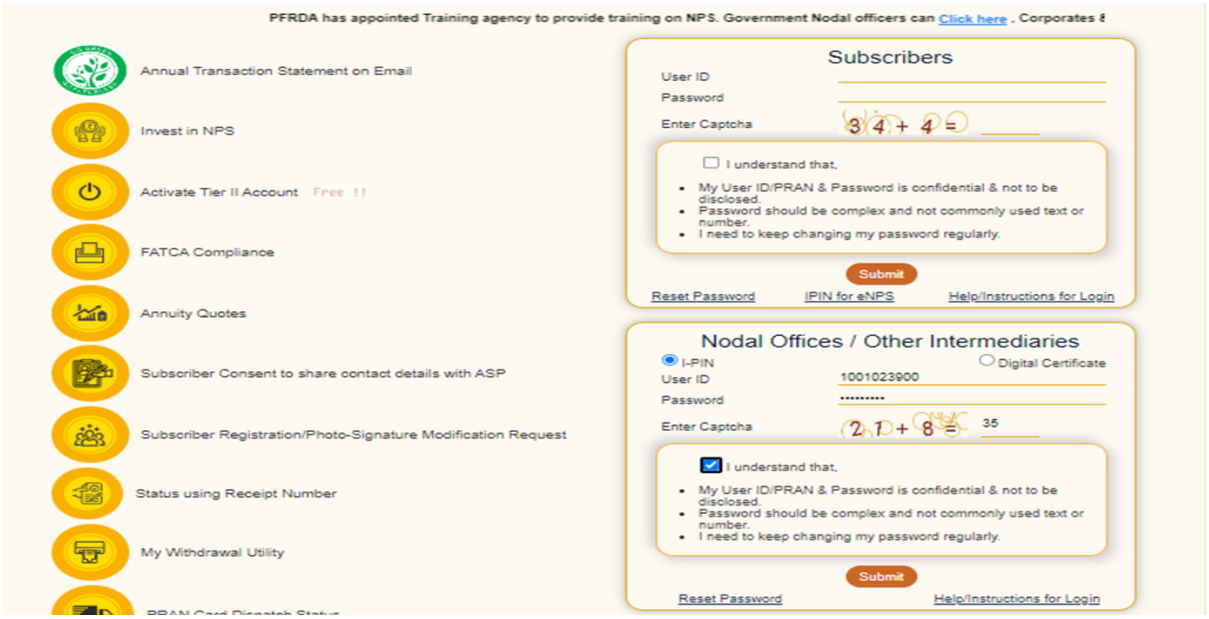


Figure 73

- Click on option **"Transaction"** and sub menu **"Subscriber Personal Details Update"** *(Please refer Figure 74)*

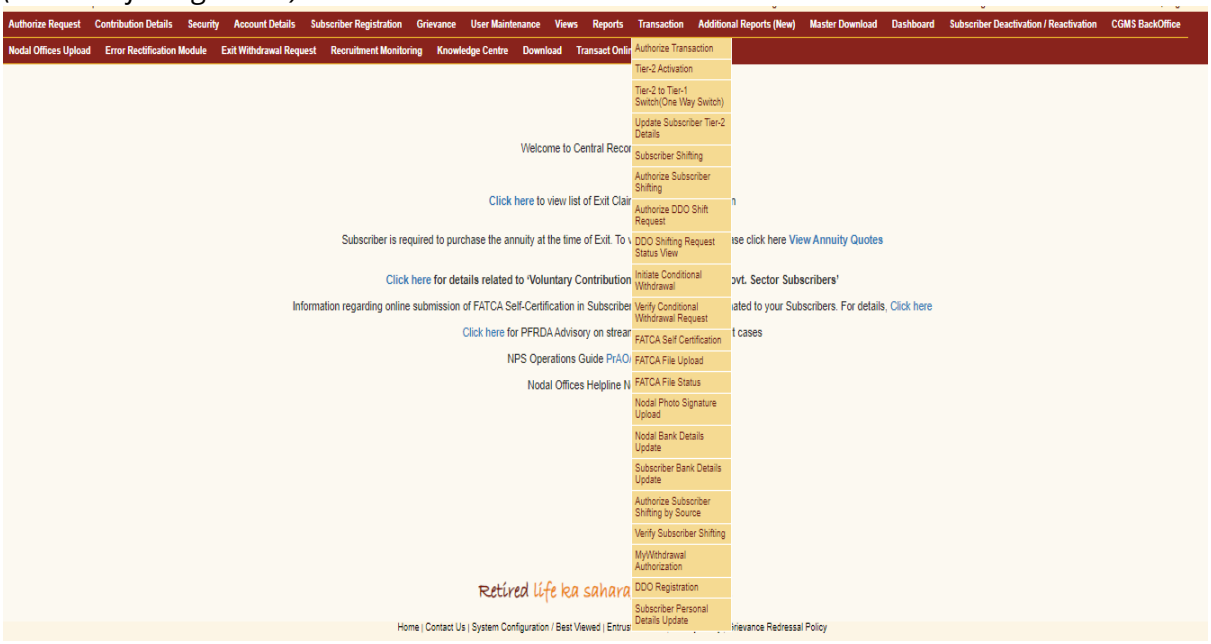


Figure 74

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

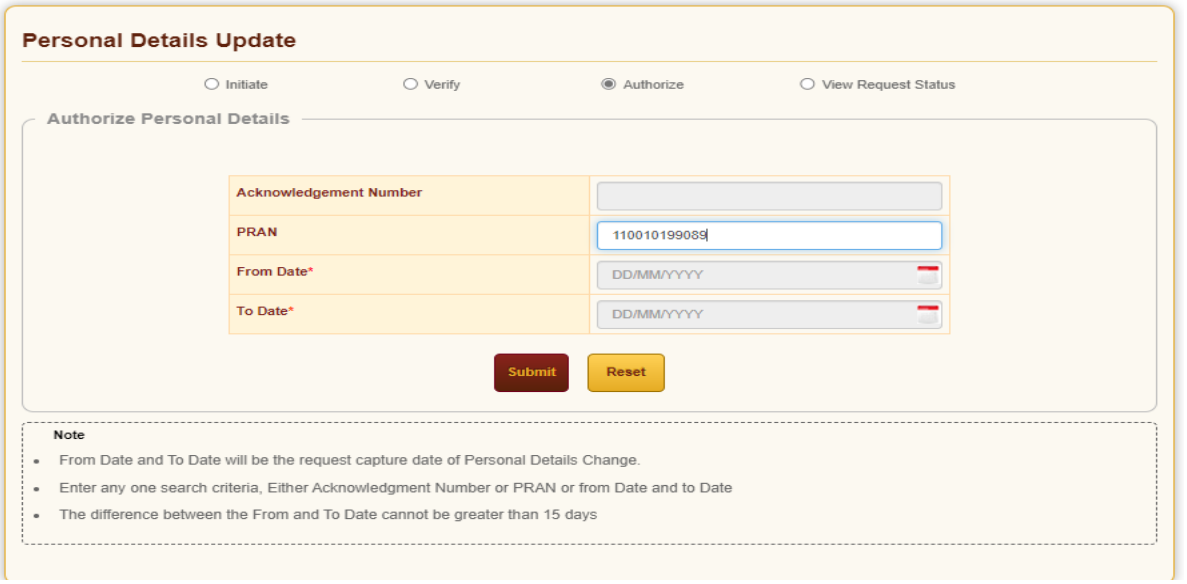


Figure 75

- Existing details pending for authorization will be available on screen. Click on hyperlink **acknowledgement number** to check the details entered by maker. Nodal office can download and see document uploaded by maker to check the details entered. Click on **"Accept".** Also tick declaration *(Please refer figure 76 and 77).* ***It is the responsibility of the office to check veracity of documents as provided by the subscriber. Also, the office has to ensure that DoR to be updated is as per service record of the office***

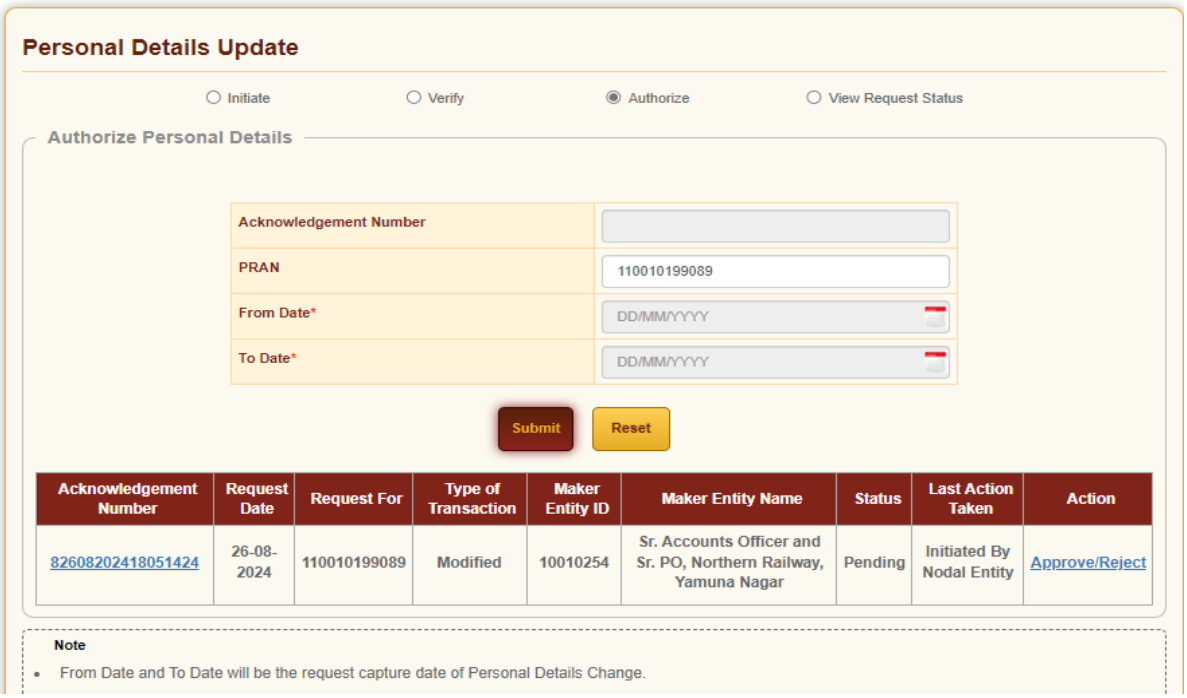


Figure 76

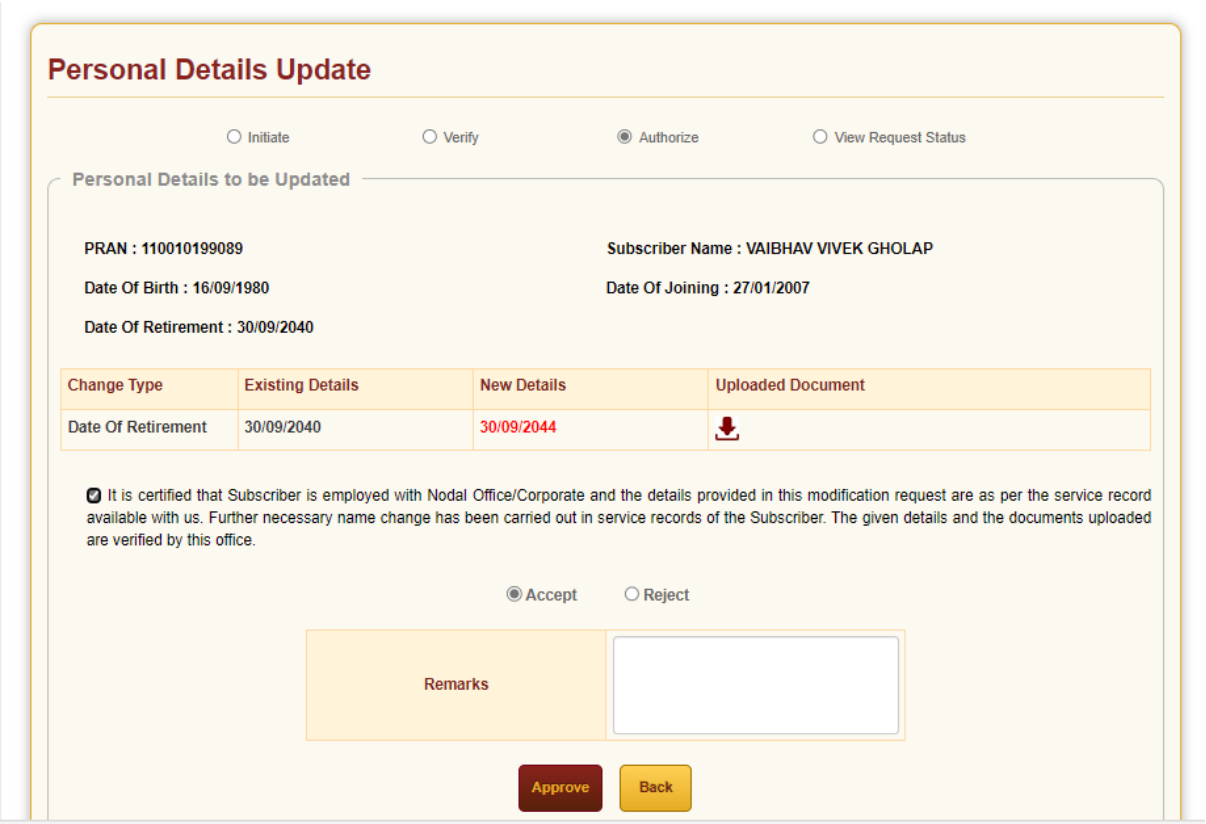


Figure 77

- Nodal office needs to verify confirmation screen and Click on “Confirm” (Please refer figure 78)

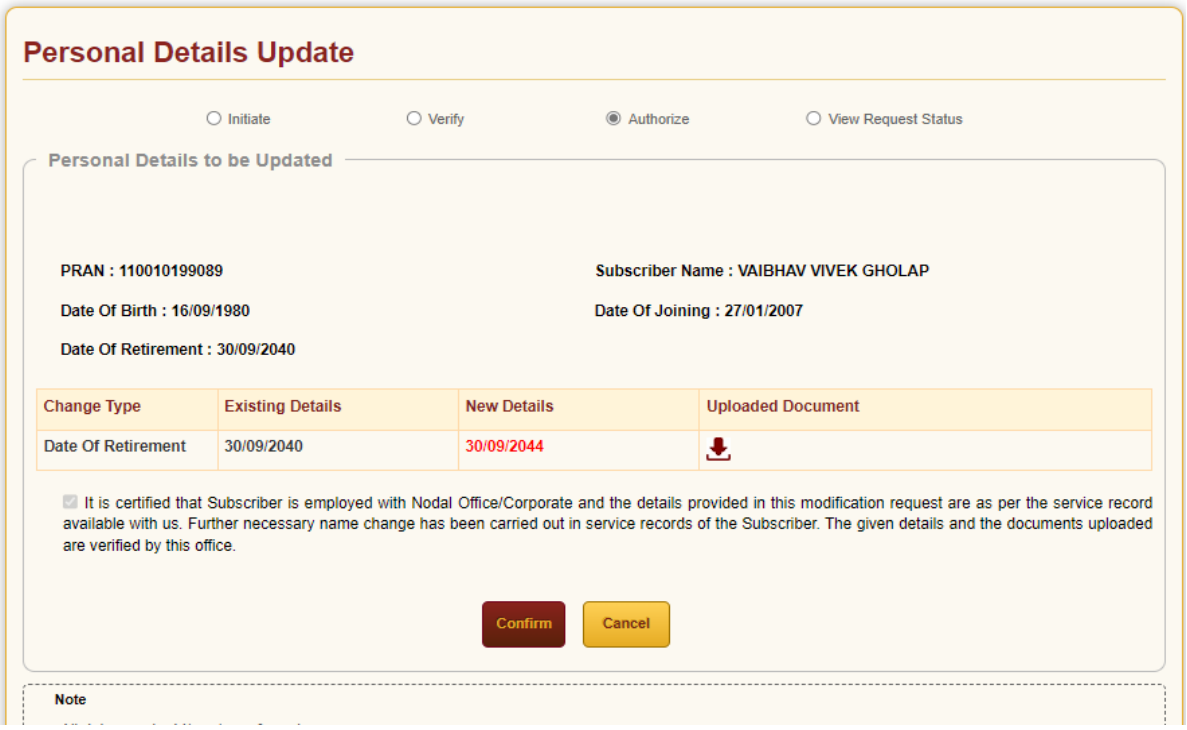


Figure 78

- The following screen will appear on successful authorization. *(Please refer Figure 79)*

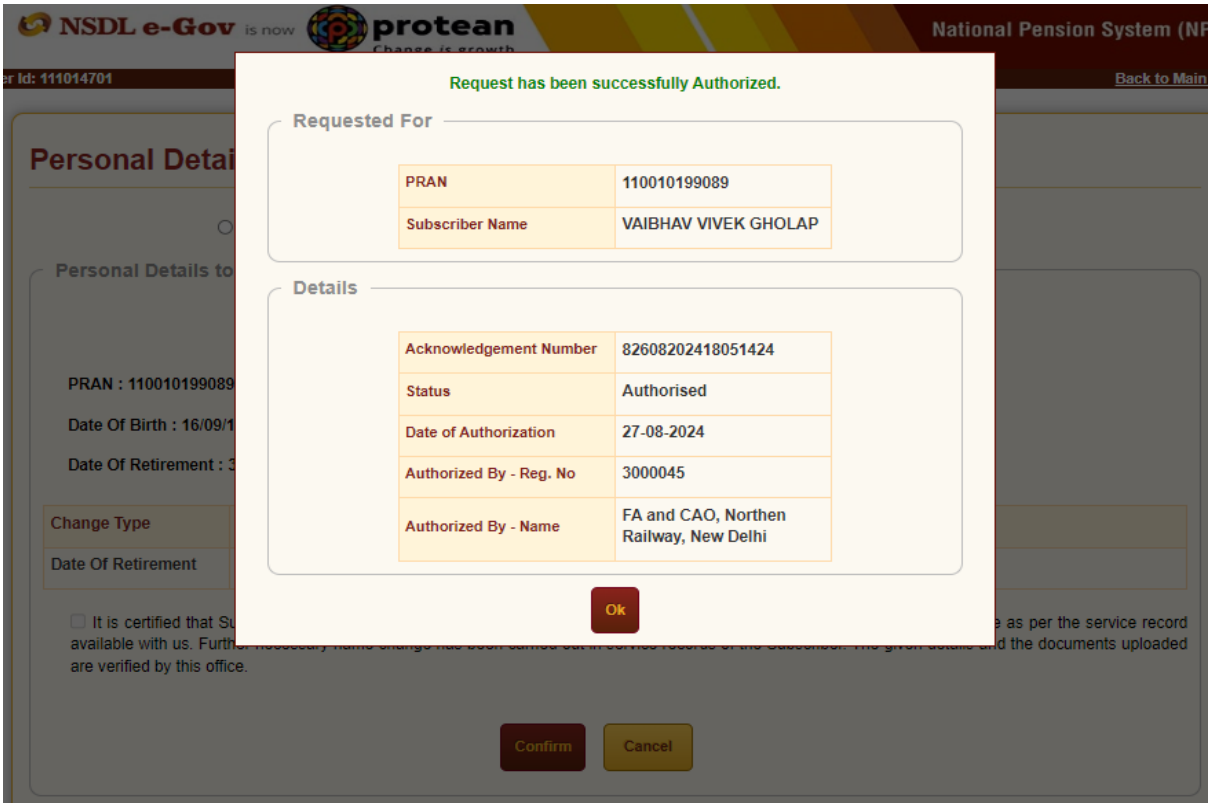


Figure 79