

Protean eGov Technologies Limited



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**Standard Operating Procedure
On
Shifting (Migration) from NPS to UPS
Initiated by DDO
and
Verification & Authorisation by PAO**

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Shifting from NPS to UPS – Initiation by DDO & Verification & Authorisation by PAO**REVISION HISTORY**

Sr. No.	Date of Revision	Ver	Section Number	Description of Change
1	25/03/2025	1.0	-	Initial Version

Shifting from NPS to UPS – Initiation by DDO & Verification & Authorisation by PAO

Acronyms and Abbreviations

The following acronyms and abbreviations have been used in this document:

ACRONYM	DESCRIPTION
CRA	Central Recordkeeping Agency
PFRDA	Pension Fund Regulatory and Development Authority
UPS	Unified Pension Scheme
NPS	National Pension System
PRAN	Permanent Retirement Account Number
CG	Central Government
Pr.AO	Principal Accounts Office
PAO	Pay & Accounts Office
DDO	Drawing & Disbursing Officer

Index

Sr. No	Topic
1	Background
2	Initiation of request by DDO
3	Verification of request by PAO
4	Authorisation of request by PAO

Shifting from NPS to UPS – Initiation by DDO & Verification & Authorisation by PAO

1. Background:

The Unified Pension Scheme (UPS) has been introduced as an option under the National Pension System (NPS) by the Central Government (CG) for the Central Government employees covered under NPS so that they may receive an assured payout after their retirement. It is a 'fund-based' payout system which relies on the regular and timely accumulation and investment of applicable contributions (from both the employee and the employer (the Central Government)) for grant of monthly payout to the retiree

The Unified Pension Scheme shall be made operational from April 1st, 2025.

An existing Central Government employee in service as on April 1st, 2025, who is covered under NPS can opt for UPS by shifting their NPS account under UPS.

The shifting process can be initiated by the subscriber online through e-NPS portal wherein the said request will be verified by DDO/PAO and needs to be authorized by PAO. Alternatively, the subscriber can submit A2 form to the Nodal Office (PAO/DDO) for shifting from NPS to UPS. On the basis of the form received, the Nodal Office will initiate the request and process the same.

This document explains the Standard Operating Procedure (SoP) for processing shifting (migration) requests initiated by the DDO on the basis of A2 Form submitted by the subscriber and verified and authorised by PAO.

Shifting from NPS to UPS – Initiation by DDO & Verification & Authorisation by PAO

2. Initiation of request by DDO

The subscriber will submit A2 form to the concerned DDO office. DDO to check the employment details of the employee as per service records and to ensure that the form is filled properly and duly signed by the Subscriber. In case, of reasons such as said employee is not eligible for shifting to UPS, form is not authorized etc. DDO to reject the form.

In case, the details are correct and form is filled and duly authorized by the Subscriber, DDO to initiate shifting request for the said subscriber based on A2 Form received.

- A. DDO user (henceforth known as maker) is required to login into the CRA system (<https://cra-nsdl.com/CRA/>) using the User ID and password.

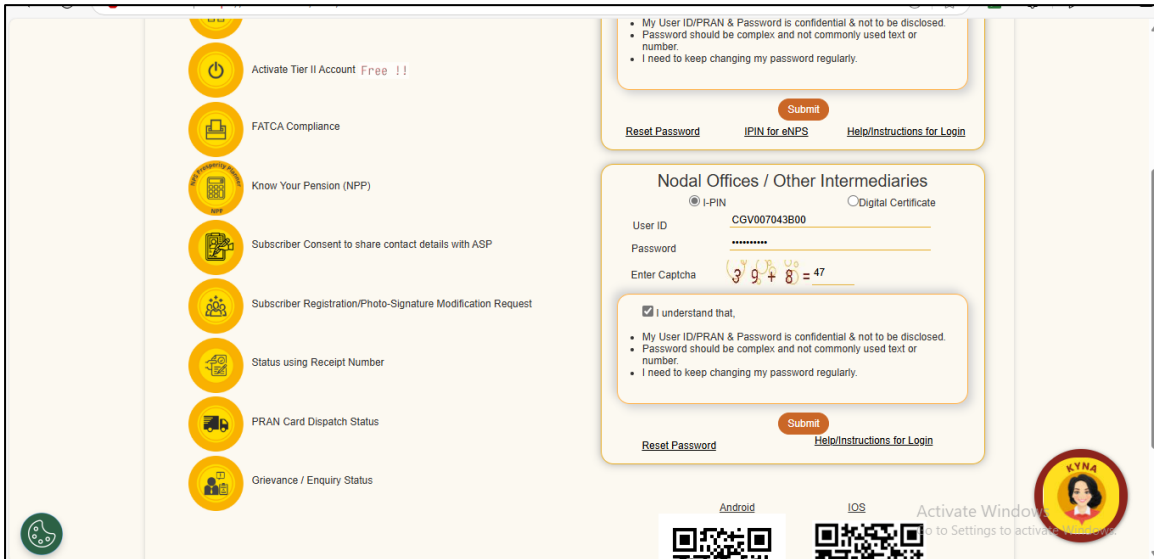


Figure 1

Shifting from NPS to UPS – Initiation by DDO & Verification & Authorisation by PAO

- B. The maker needs to click “Unified Pension Scheme” menu and click on option “migration to UPS.”



Figure 2

- C. The maker needs to select ‘Initiate’ option and enter PRAN and click on ‘Submit’ button.

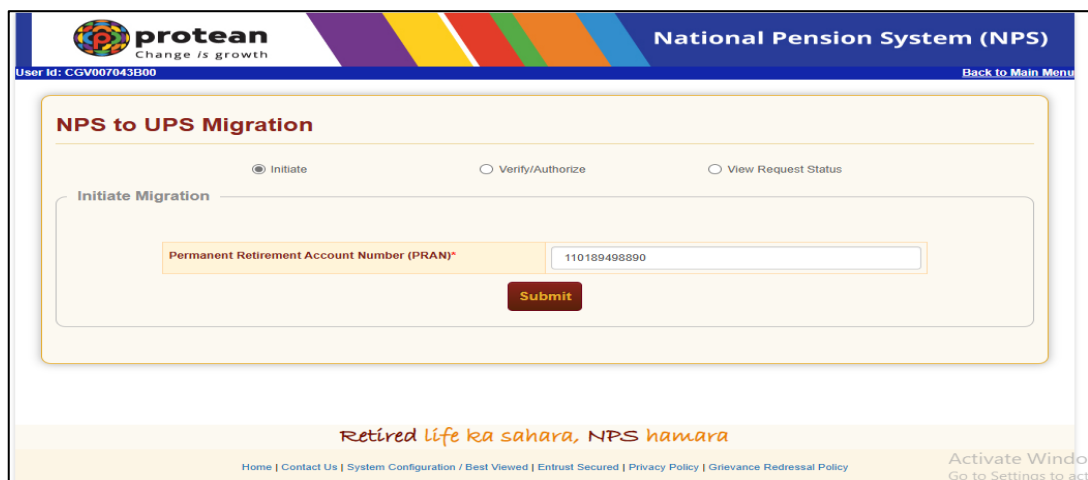


Figure 3

Shifting from NPS to UPS – Initiation by DDO & Verification & Authorisation by PAO

D. On clicking 'Submit' button, personal details and certain employment details of the subscriber already registered in the CRA system will be populated in the screen. The maker is required to enter certain additional employment details as follows:

- Employee Code/ID
- Date of commencement of qualifying service
- Current month Basic Pay
- Non-Practicing Allowance (NPA), if applicable
- Schedule date for next increment

Figure 4

It is the responsibility of the DDO to verify the eligibility of the Subscriber to migrate to UPS and also ensure that the details entered are as per the service records.

DDO should scan and upload the A2 form (UPS migration form) mandatorily - File type should be pdf or jpg or jpeg and File Size should be 2KB to 5 MB.


Shifting from NPS to UPS - Initiation by DDO & Verification & Authorisation by PAO

After upload of A2 form, the maker is required to select the declaration and click on submit. The declaration is as follows

"Subscriber has exercised, irrevocable, option to subscribe to Unified Pension Scheme (UPS) notified by GOI vide their notification F. No. FX-1/3/2024-PR, dated 24-January-25 and agree to shift NPS Corpus (employee's and employer's contribution under Tier - I account) to UPS account."

- E. Once the maker clicks on submit, acknowledgement number will be generated and will be displayed on the screen with the status as 'The request for NPS to UPS migration is raised and pending for verification.'

Status Screen: Under request status view option, status of request initiated by DDO can be viewed either on the basis of date range or PRAN/Acknowledgement no. The Status screen of the request initiated by DDO is as follows:

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National Pension System (NPS)

User Id: CGV007043B00

Back to Main Menu

NPS to UPS Migration

PRAN: 110189498890
PAO Name: PAOOFFEECE
DDO Name: OCRI (GW)

SUBSCRIBER NAME: Sumit Hanumant Mandhare KANT TIWARI
PAO Reg No: 2000014
DDO TAN: CGV007043B

Personal Details

Date of Birth	08/10/1995	Gender	MALE
PAN	NJHPN1531P		

Employment Details

Date of Joining	01-Jan-2015	Department	DAT
Ministry	FINANCEDEPARTMENTDDDD	DDO Office	DEMO_DDO
Employee Code/ID*	103HFFJ66YY7URR	Date of commencement of qualifying service*	10-Dec-2024
Non-Practicing Allowance (NPA)		Current month Basic Pay*	50000.00
Schedule date for next increment*	31-Dec-2025		

Document Upload

UPS Migration Form*

Ministry	FINANCEDEPARTMENTDDDD	DDO Office	DEMO_DDO
Employee Code/ID*	103HFFJ66YY7URR	Date of commencement of qualifying service*	10-Dec-2024
Non-Practicing Allowance (NPA)		Current month Basic Pay*	50000.00
Schedule date for next increment*	31-Dec-2025		

Document Upload

UPS Migration Form*

Declaration

☒ Subscriber has exercised, irrevocable, option to subscribe to Unified Pension Scheme (UPS) notified by GOI vide their notification F. No. FX-1/3/2024-PR, dated 24-January-25, and agree to shift NPS Corpus (employee's and employer's contribution under Tier-I account) to UPS account.*

Flow View

DDO Initiator

Nodal Verifier

Nodal Authorizer

Completed

Entity ID	User ID	Date	User Type	Action Taken	Rejection Category	Remarks
120080262	CGV007043B00	18-03-2025	Nodal Initiator	-		REQUEST RAISED

Back

Retired Life ka sahara, NPS hamara

Shifting from NPS to UPS – Initiation by DDO & Verification & Authorisation by PAO

Figure 5

3. Verification of requests by PAO

- A. PAO user (henceforth known as verifier) is required to login into the CRA system (<https://cra-nsdl.com/CRA/>) using the User ID and password.

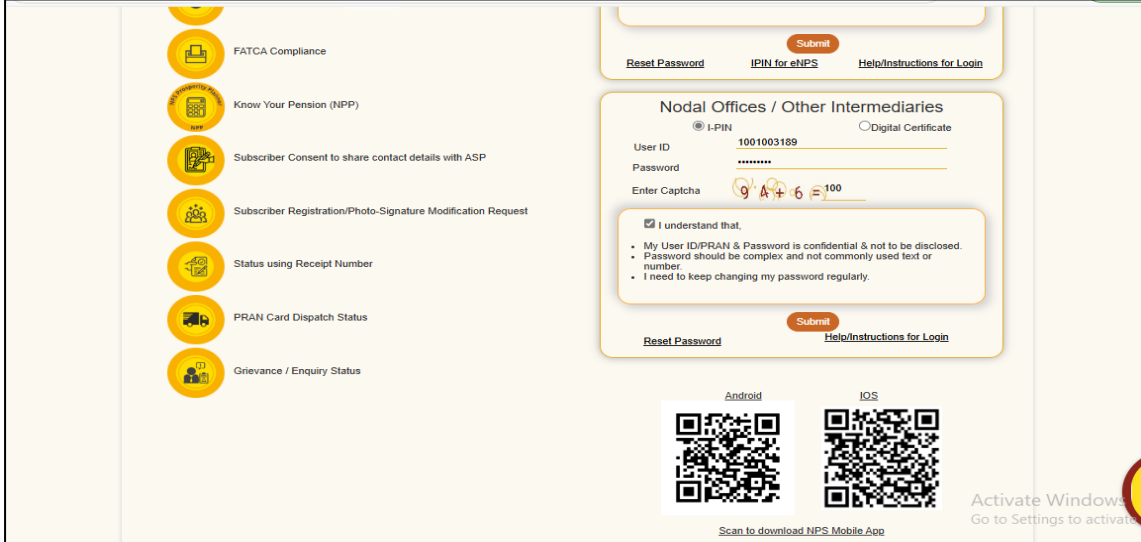
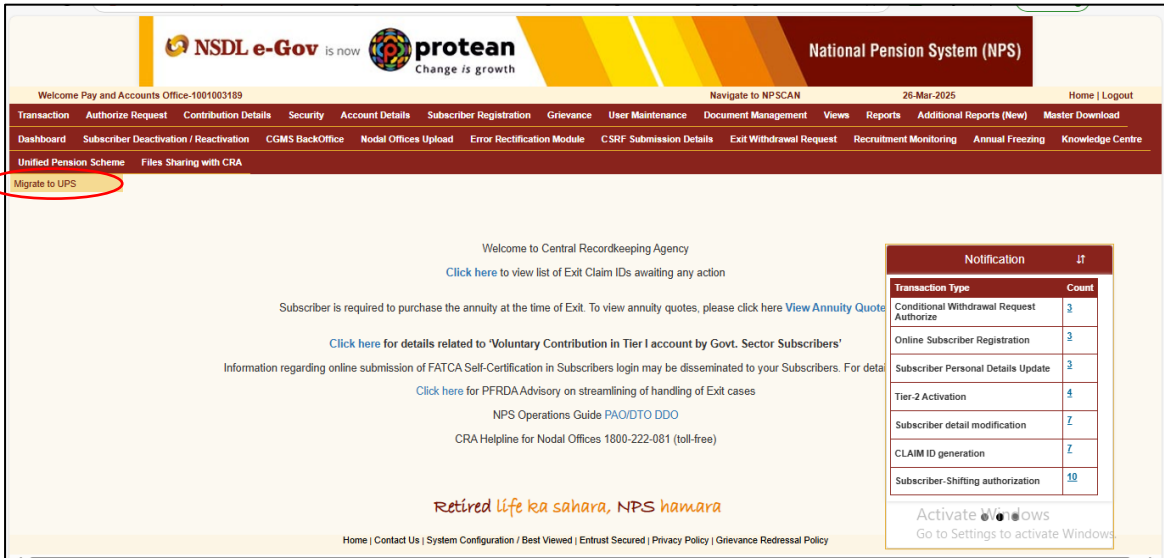


Figure 6

- B. The verifier needs to select “Unified Pension Scheme” menu and click on option “migration to UPS.”

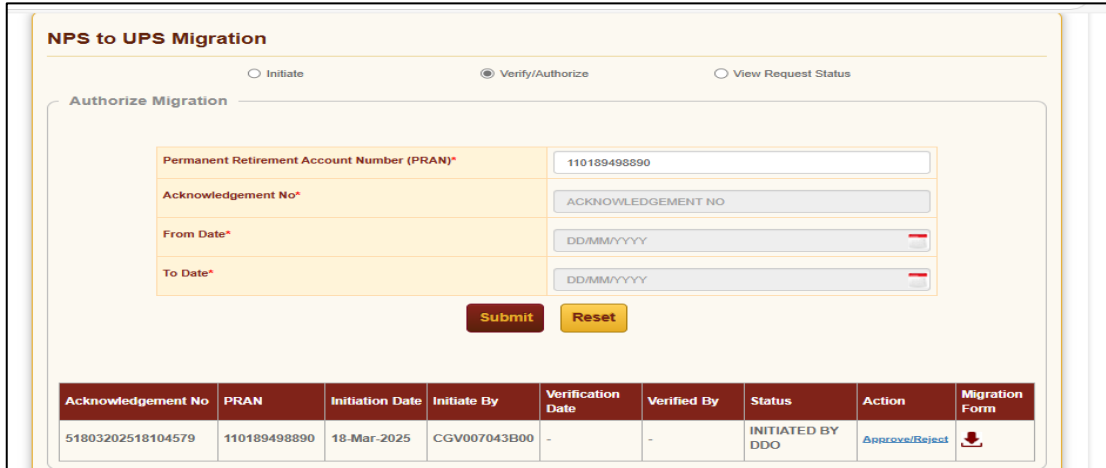


Transaction Type	Count
Conditional Withdrawal Request Authorize	3
Online Subscriber Registration	3
Subscriber Personal Details Update	2
Tier-2 Activation	4
Subscriber detail modification	7
CLAIM ID generation	7
Subscriber-Shifting authorization	10

Figure 7

Shifting from NPS to UPS – Initiation by DDO & Verification & Authorisation by PAO

- C. The verifier is required to select verify options and enter PRAN/ Acknowledgement details and click on submit button. There is option to enter date range viz “From Date” and “To Date”. On providing date range, all the requests pending for verification will appear.




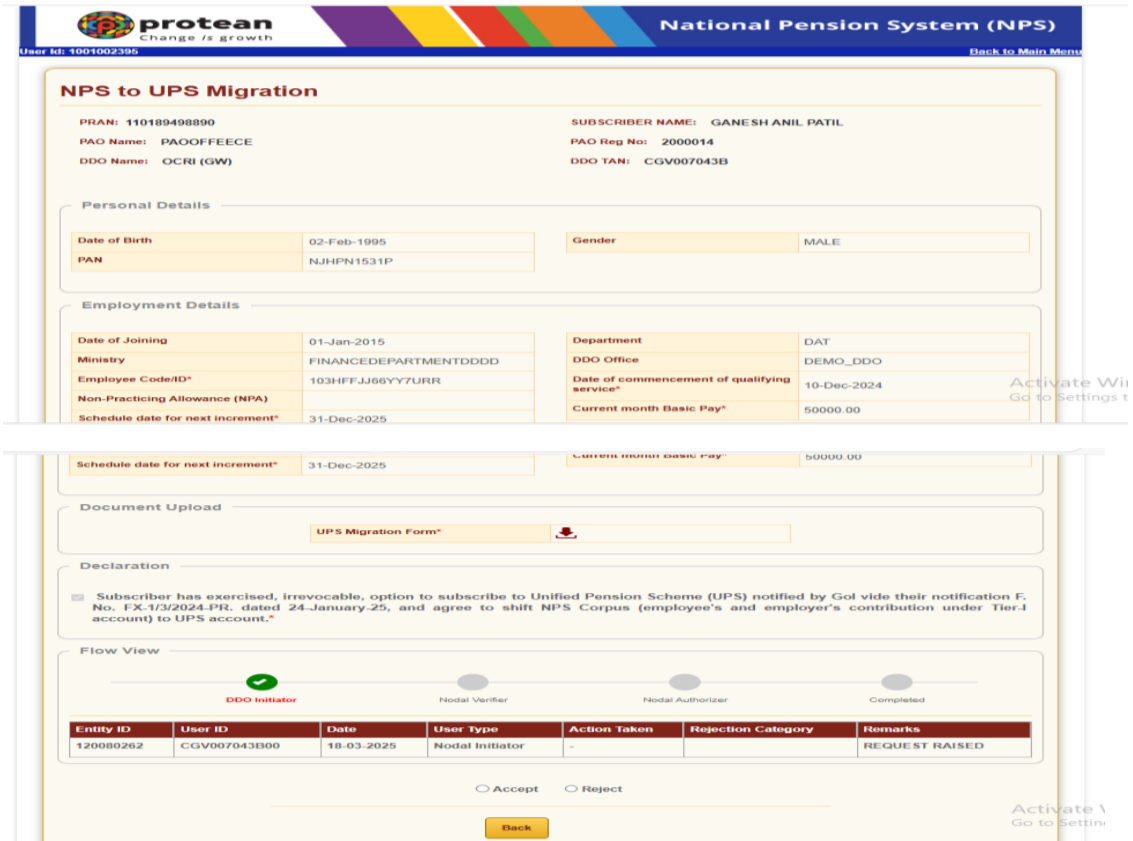
Acknowledgement No	PRAN	Initiation Date	Initiate By	Verification Date	Verified By	Status	Action	Migration Form
51803202518104579	110189498890	18-Mar-2025	CGV007043B00	-	-	INITIATED BY DDO	Approve/Reject	

Figure 8

- D. On submission, the search records will be displayed on the screen. Once the verifier clicks on “Approve/Reject” link, all the details of a request will be displayed on the screen.

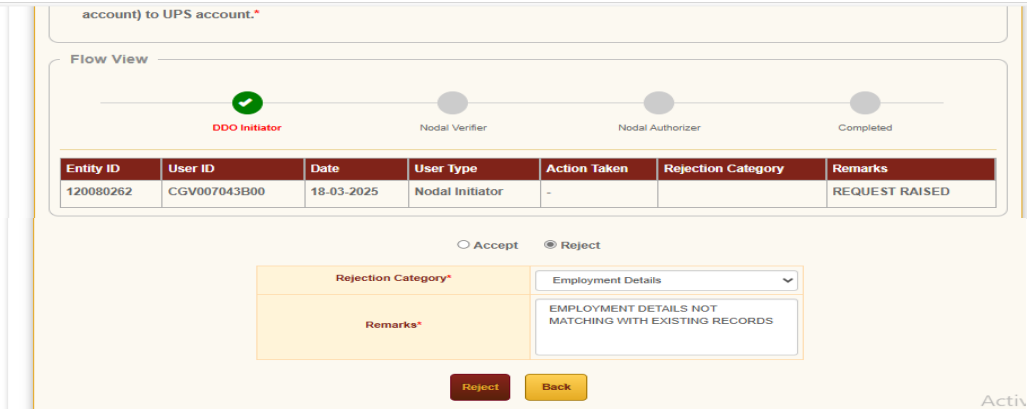


Entity ID	User ID	Date	User Type	Action Taken	Rejection Category	Remarks
120080262	CGV007043B00	18-03-2025	Nodal Initiator	-	-	REQUEST RAISED

Figure 9

Shifting from NPS to UPS – Initiation by DDO & Verification & Authorisation by PAO

- E. The verifier can view the A2 form uploaded by the maker (DDO). Verifier needs to verify the employment details of the employee and can accept or reject the request. The verifier needs to select the rejection category as “employment details” and provides remarks and click on reject button.



account) to UPS account.*

Flow View

DDO Initiator Nodal Verifier Nodal Authorizer Completed

Entity ID	User ID	Date	User Type	Action Taken	Rejection Category	Remarks
120080262	CGV007043B00	18-03-2025	Nodal Initiator	-		REQUEST RAISED

☐ Accept ☒ Reject

Rejection Category* Employment Details

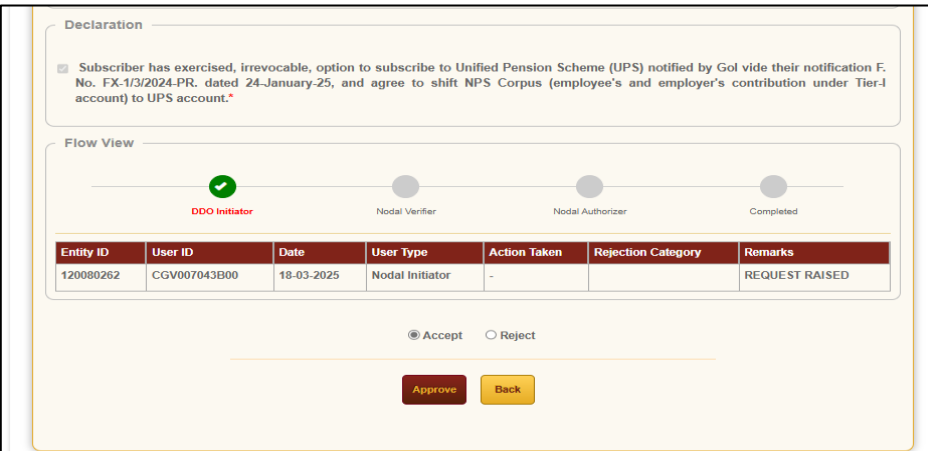
Remarks* EMPLOYMENT DETAILS NOT MATCHING WITH EXISTING RECORDS

Reject Back

Figure 10

On clicking the rejection button, the shifting request will get rejected.

- F. In case, the details are correct, the verifier needs to select 'Accept' option and click on Approve button.



Declaration

☒ Subscriber has exercised, irrevocable, option to subscribe to Unified Pension Scheme (UPS) notified by GoI vide their notification F. No. FX-1/3/2024-PR. dated 24-January-25, and agree to shift NPS Corpus (employee's and employer's contribution under Tier-I account) to UPS account.*

Flow View

DDO Initiator Nodal Verifier Nodal Authorizer Completed

Entity ID	User ID	Date	User Type	Action Taken	Rejection Category	Remarks
120080262	CGV007043B00	18-03-2025	Nodal Initiator	-		REQUEST RAISED

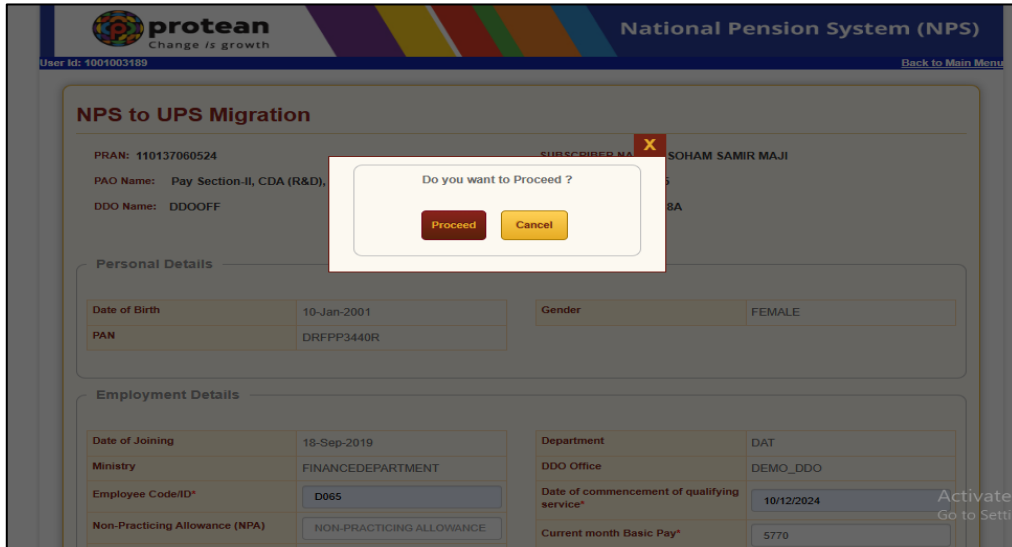
☒ Accept ☐ Reject

Approve Back

Figure 11

Shifting from NPS to UPS – Initiation by DDO & Verification & Authorisation by PAO

- G. On selecting the Approve button, the confirmation screen would appear where verifier has to select either proceed or cancel button.



NPS to UPS Migration

PRAN: 110137060524
 PAO Name: Pay Section-II, CDA (R&D),
 DDO Name: DDOOFF

Do you want to Proceed ?

Proceed Cancel

Personal Details

Date of Birth: 10-Jan-2001
 PAN: DRFPF3440R
 Gender: FEMALE

Employment Details

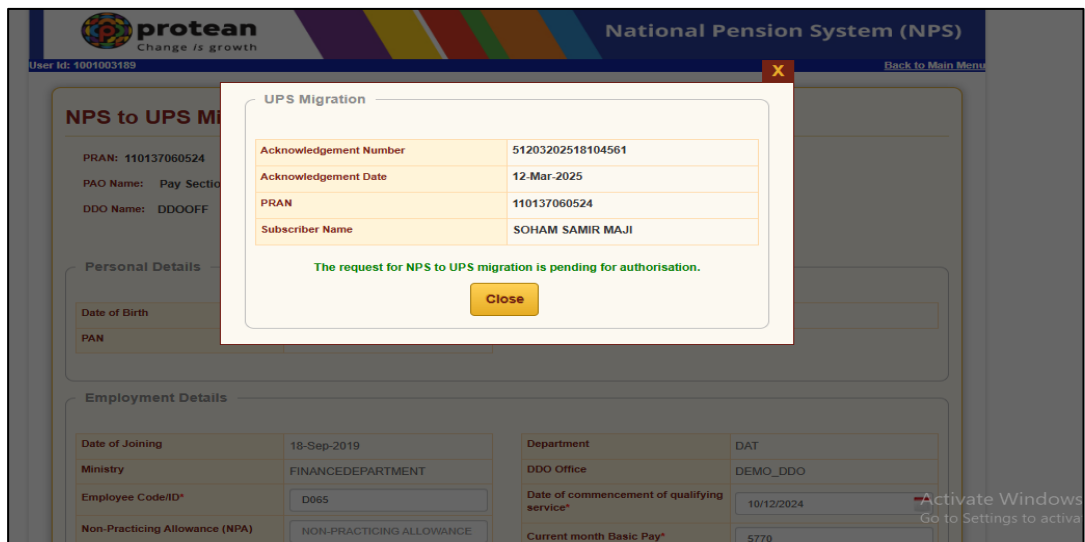
Date of Joining: 18-Sep-2019
 Ministry: FINANCEDEPARTMENT
 Employee Code/ID*: D065
 Non-Practicing Allowance (NPA): NON-PRACTICING ALLOWANCE

Department: DAT
 DDO Office: DEMO_DDO
 Date of commencement of qualifying service*: 10/12/2024
 Current month Basic Pay*: 5770

Activate Windows
Go to Settings to activate Windows.

Figure 12

- H. By clicking on “Proceed’ option, the request will get verified and the status will be updated as ‘The request for NPS to UPS migration is pending for authorisation’.



NPS to UPS Migration

PRAN: 110137060524
 PAO Name: Pay Section-II, CDA (R&D),
 DDO Name: DDOOFF

UPS Migration

Acknowledgement Number: 51203202518104561
 Acknowledgement Date: 12-Mar-2025
 PRAN: 110137060524
 Subscriber Name: SOHAM SAMIR MAJI

The request for NPS to UPS migration is pending for authorisation.

Close

Personal Details

Date of Birth: 10-Jan-2001
 PAN: DRFPF3440R

Employment Details

Date of Joining: 18-Sep-2019
 Ministry: FINANCEDEPARTMENT
 Employee Code/ID*: D065
 Non-Practicing Allowance (NPA): NON-PRACTICING ALLOWANCE

Department: DAT
 DDO Office: DEMO_DDO
 Date of commencement of qualifying service*: 10/12/2024
 Current month Basic Pay*: 5770

Activate Windows
Go to Settings to activate Windows.

Figure 13

Shifting from NPS to UPS – Initiation by DDO & Verification & Authorisation by PAO

4. Authorization of request by PAO

- A. PAO office (hereafter termed as authorizer) is required to login into the CRA system (<https://cra-nsdl.com/CRA/>) using the User ID and password.

Figure 14

- B. The authoriser needs to go to “Unified Pension Scheme” menu and click on “migrate to UPS” option.

Transaction Type	Count
Conditional Withdrawal Request	3
Online Subscriber Registration	3
Subscriber Personal Details Update	3
Tier-2 Activation	4
Subscriber detail modification	2
CLAIM ID generation	2
Subscriber-Shifting authorization	10

Figure 15

- C. The authorizer needs to select “Verify/Authorize” tab and provide date range i.e. “From Date” and “To Date” and click on submit.


Acknowledgement No	PRAN	Initiation Date	Initiate By	Verification Date	Verified By	Status	Action	Migration Form
51003202518104542	110051049779	10-Mar-2025	CGV007031D00	-	-	INITIATED BY DDO	Approve/Reject	Download
51103202518104545	110107055026	11-Mar-2025	110107055026	11-Mar-2025	CGV007028A00	Verified, awaiting authorisation	Approve/Reject	Download

Figure 16

Shifting from NPS to UPS – Initiation by DDO & Verification & Authorisation by PAO

- D. Once Authoriser clicks on “Approve/Reject” link for one request, all the details of the said request will be displayed on the screen. (View Figure 17). The authoriser can reject the request if the details entered are not correct.

The authoriser needs to select the rejection category as “employment details” and provide remarks and click on reject button.


National Pension System (NPS)
User ID: 1001002393
Back to Main Menu

NPS to UPS Migration

PRAN: 110189498890
PAO Name: PAOFFEECE
DDO Name: OCRI (GW)

SUBSCRIBER NAME: GANESH ANIL PATIL
PAO Reg No: 2000014
DDO TAN: CGV007043B


Personal Details

Date of Birth	02-Feb-1995	Gender	MALE
PAN	NJHPN1531P		

Employment Details

Date of Joining	01-Jan-2015	Department	DAT
Ministry	FINANCEDEPARTMENTDDDD	DDO Office	DEMO_DDO
Employee Code/ID*	103HFFJ66YY7URR	Date of commencement of qualifying service*	10-Dec-2024
Non-Practicing Allowance (NPA)		Current month Basic Pay*	50000.00
Schedule date for next increment*	31-Dec-2025		

Document Upload

UPS Migration Form*


Declaration

☒ Subscriber has exercised, irrevocable, option to subscribe to Unified Pension Scheme (UPS) notified by Govt vide their notification F. No. FX-1/3/2024-PR, dated 24-January-25, and agree to shift NPS Corpus (employee's and employer's contribution under Tier-I account) to UPS account.*

Flow View

DDO Initiator
Nodal Verifier
Nodal Authorizer
Completed

Entity ID	User ID	Date	User Type	Action Taken	Rejection Category	Remarks
120080262	CGV007043B00	18-03-2025	Nodal Initiator	-		REQUEST RAISED
10010023	1001002395	24-03-2025	Nodal Verifier	Accepted	PERSONAL DETAILS	

☐ Accept
☐ Reject

Back

☐ Accept
☒ Reject

Rejection Category*
Employment Details

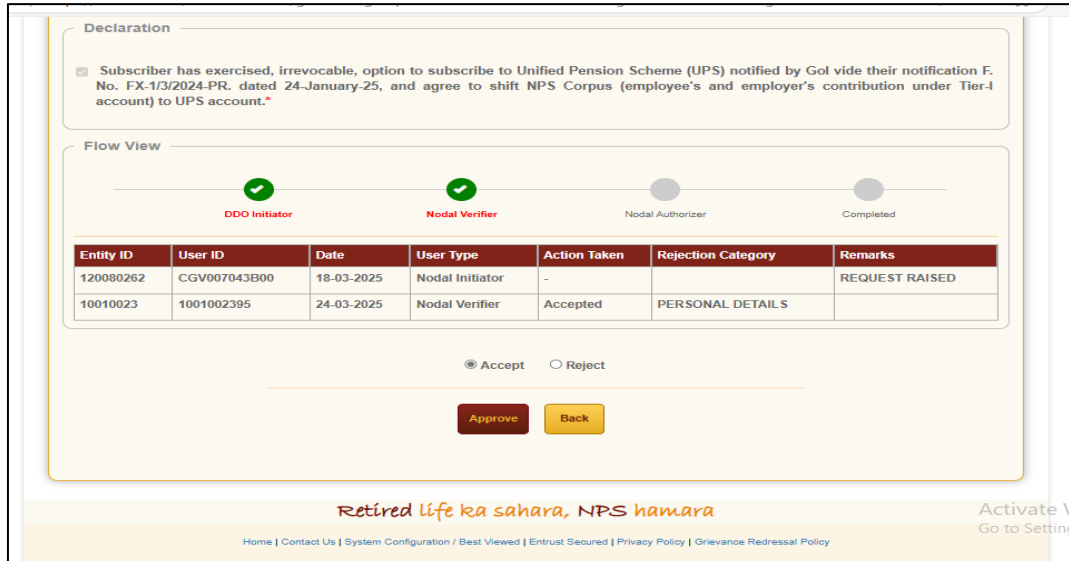
Remarks*
EMPLOYMENT DETAILS NOT MATCHING WITH EXISTING RECORDS

Reject
Back

Figure 17

Shifting from NPS to UPS – Initiation by DDO & Verification & Authorisation by PAO

- E. In case, details displayed are correct, the authoriser needs to select 'Accept' and click on 'Approve' button.



Declaration

☒ Subscriber has exercised, irrevocable, option to subscribe to Unified Pension Scheme (UPS) notified by Govt vide their notification F. No. FX-1/3/2024-PR. dated 24-January-25, and agree to shift NPS Corpus (employee's and employer's contribution under Tier-I account) to UPS account.*

Flow View

DDO Initiator ✔ Nodal Verifier ✔ Nodal Authorizer ● Completed ●

Entity ID	User ID	Date	User Type	Action Taken	Rejection Category	Remarks
120080262	CGV007043B00	18-03-2025	Nodal Initiator	-		REQUEST RAISED
10010023	1001002395	24-03-2025	Nodal Verifier	Accepted	PERSONAL DETAILS	

☒ Accept ☐ Reject

Approve **Back**

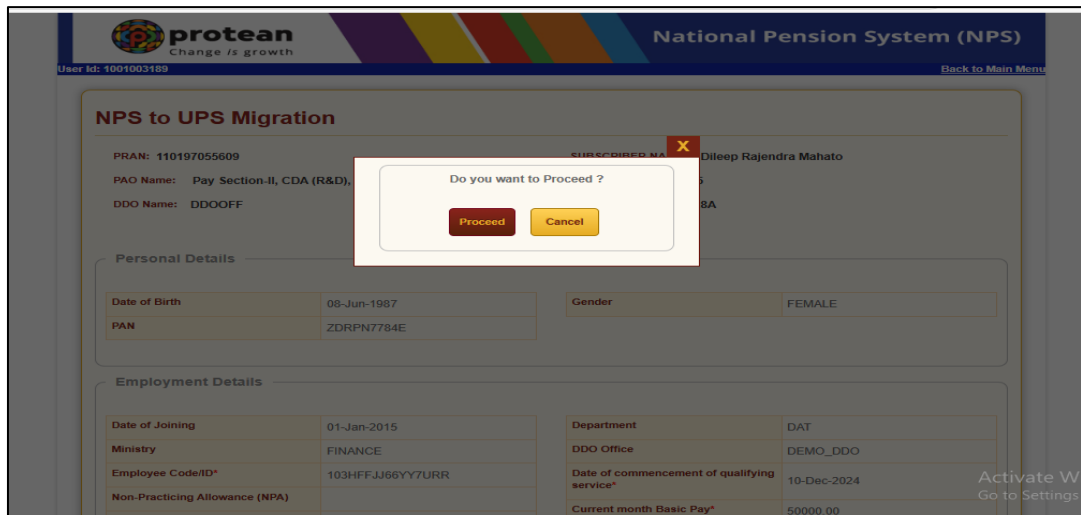
Retired life ka sahara, NPS hamara

Home | Contact Us | System Configuration / Best Viewed | Entrust Secured | Privacy Policy | Grievance Redressal Policy

Activate V
Go to Setting

Figure 18

- F. On selecting the Approve button, the confirmation screen would appear where authoriser has to select either proceed or cancel button.



NPS to UPS Migration

PRAN: 110197055609
 PAO Name: Pay Section-II, CDA (R&D),
 DDO Name: DDOOFF

Personal Details

Date of Birth: 08-Jun-1987 Gender: FEMALE
 PAN: ZDRPN7784E

Employment Details

Date of Joining: 01-Jan-2015 Department: DAT
 Ministry: FINANCE DDO Office: DEMO_DDO
 Employee Code/ID*: 103HFFJ66YY7URR Date of commencement of qualifying service*: 10-Dec-2024
 Non-Practicing Allowance (NPA) Current month Basic Pay*: 50000.00

Do you want to Proceed ?

Proceed **Cancel**

Activate W
Go to Settings

Figure 19

Shifting from NPS to UPS - Initiation by DDO & Verification & Authorisation by PAO

- G. By clicking on "Proceed" option, the request will get authorised and the status will be updated as 'The request for NPS to UPS migration is authorised.'

The screenshot shows the 'NPS to UPS Migration' window. It contains a confirmation message: "The request for NPS to UPS migration is authorized." Below the message is a "Close" button. The background shows the user's profile details, including PRAN, PAO Name, DDO Name, Personal Details, and Employment Details.

Figure 20

Status View: The nodal office can check the request status by selecting 'view request status' and enter date range or PRAN/acknowledgement no.

The screenshot shows the 'NPS to UPS Migration' interface with the 'View Request Status' option selected. It displays a table of migration requests with the following columns: Acknowledgement No, PRAN, Initiation Date, Initiate By, Verification Date, Verified By, Status, and Migration Form. The table contains 10 rows of data, all with a status of 'Authorized'.

Acknowledgement No	PRAN	Initiation Date	Initiate By	Verification Date	Verified By	Status	Migration Form
52503202518100087	111102170604	25-Mar-2025	111102170604	25-Mar-2025	1001003101	Authorized	Download
52503202518100086	110177058625	25-Mar-2025	110177058625	-	-	Esigned By Subscriber	-
52503202518100083	110184018585	25-Mar-2025	CGV020330C00	25-Mar-2025	111006301	Authorized by Nodal	Download
52503202518100052	110109496532	25-Mar-2025	1001003189	25-Mar-2025	1001003101	Authorized by Nodal	Download
52503202518100051	110003708167	25-Mar-2025	1001003189	25-Mar-2025	1001003101	Authorized by Nodal	Download
52503202518100050	110020323952	25-Mar-2025	1001003189	25-Mar-2025	1001003101	Authorized by Nodal	Download
52503202518100049	110060341011	25-Mar-2025	1001003189	25-Mar-2025	1001003101	Authorized by Nodal	Download
52503202518100048	110010338606	25-Mar-2025	1001003189	25-Mar-2025	1001003101	Authorized by Nodal	Download
52503202518100047	110040341303	25-Mar-2025	1001003189	25-Mar-2025	1001003101	Authorized by Nodal	Download
52503202518100046	110050341308	25-Mar-2025	1001003189	25-Mar-2025	1001003101	Authorized by Nodal	Download

Figure 21

The Subscriber Shifting requests with status as "**Authorized**" will indicate that PRAN is shifted from **NPS to UPS** and the said PRAN will be prefixed with **UPS** for identification.
