Protean eGov Technologies Limited

Standard Operating Procedure
On
Shifting (Migration) from NPS to UPS

Initiated by DDO

and

Verification & Authorisation by PAO

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REVISION HISTORY

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

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

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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.

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.

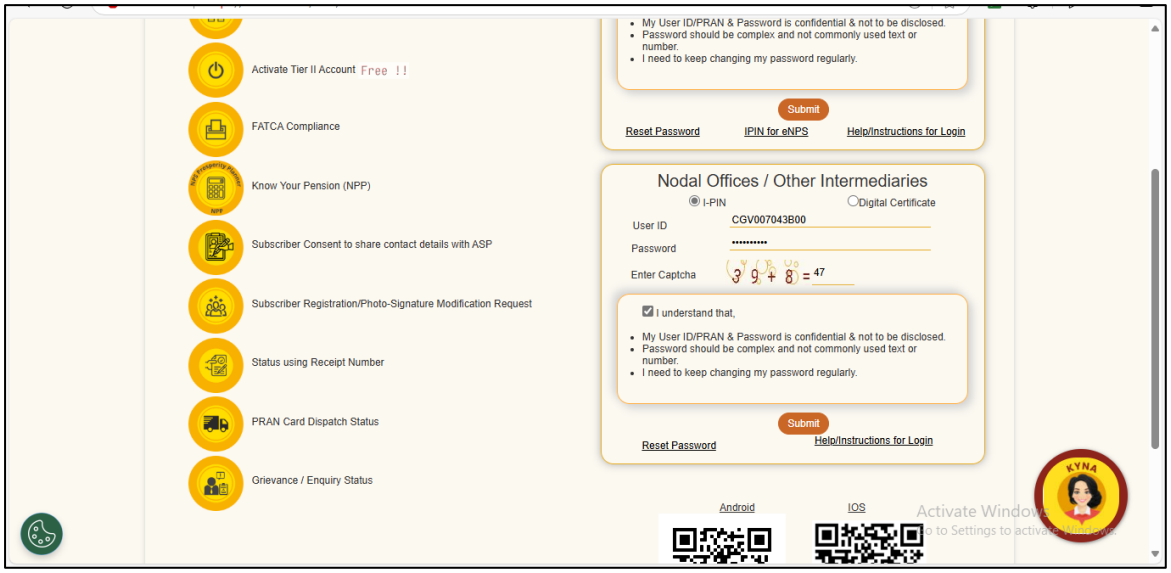


Figure 1

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.

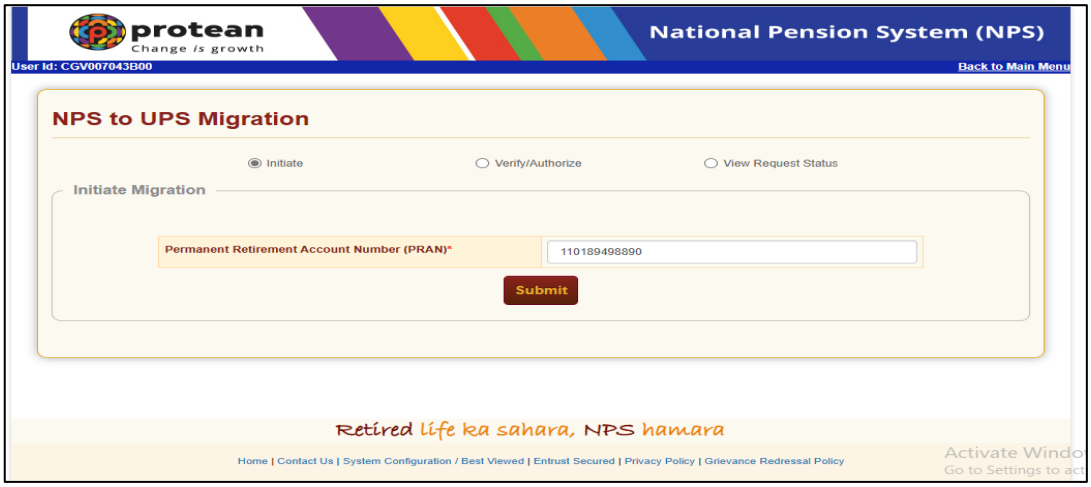


Figure 3

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

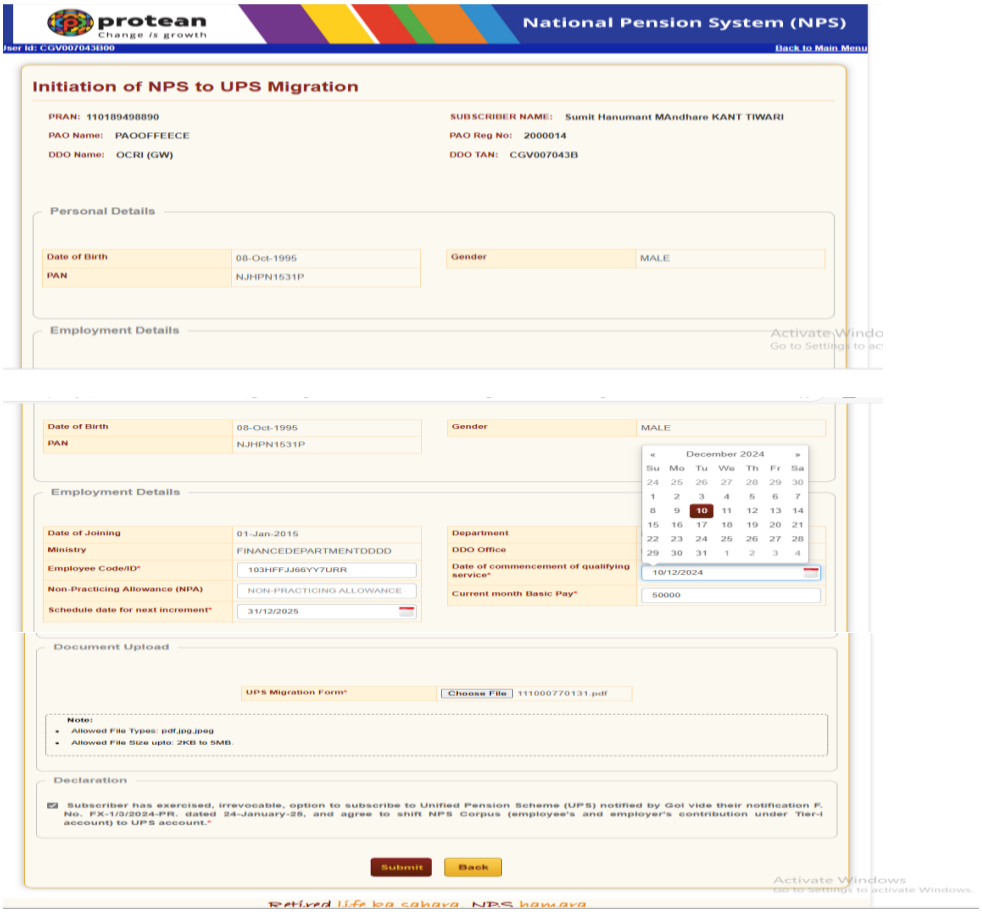


Figure 4

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.

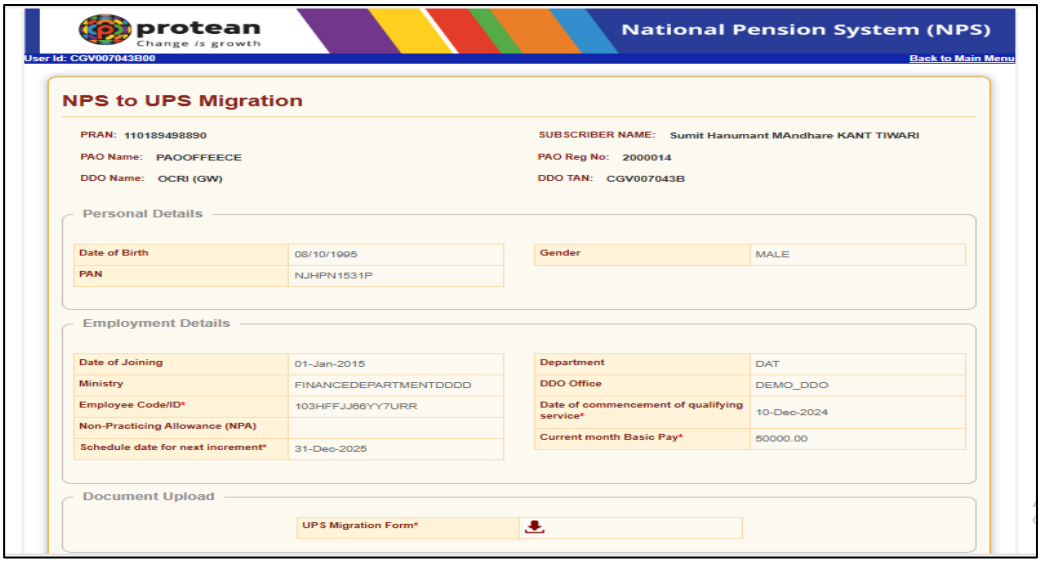
DDO should scan and upload the A2 form (UPS migration form) mandatorily - File type should be pdf or jpg or jpeg and File Size should be 2KB to 5 MB.

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:



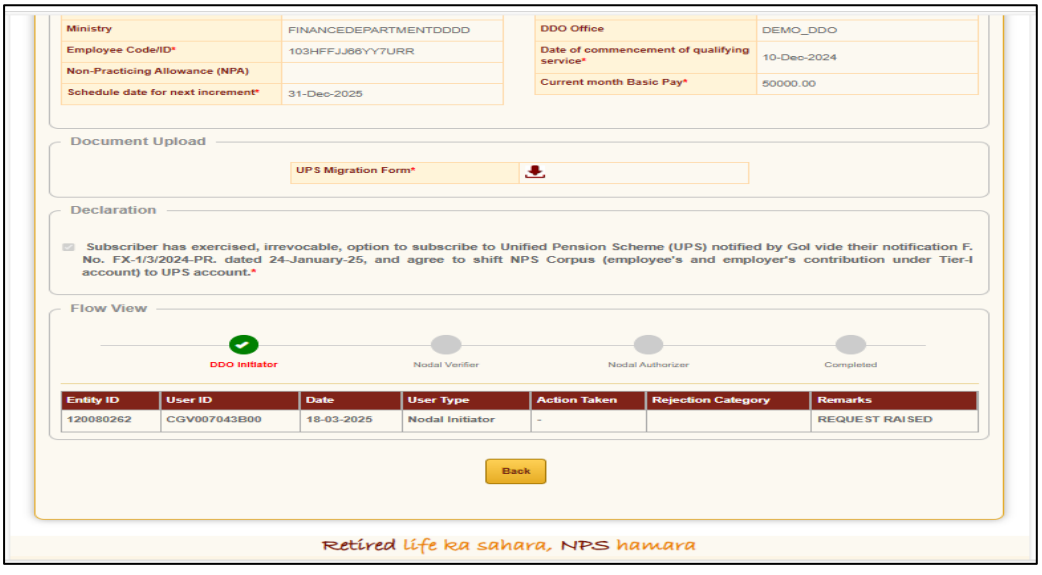


Figure 5

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.

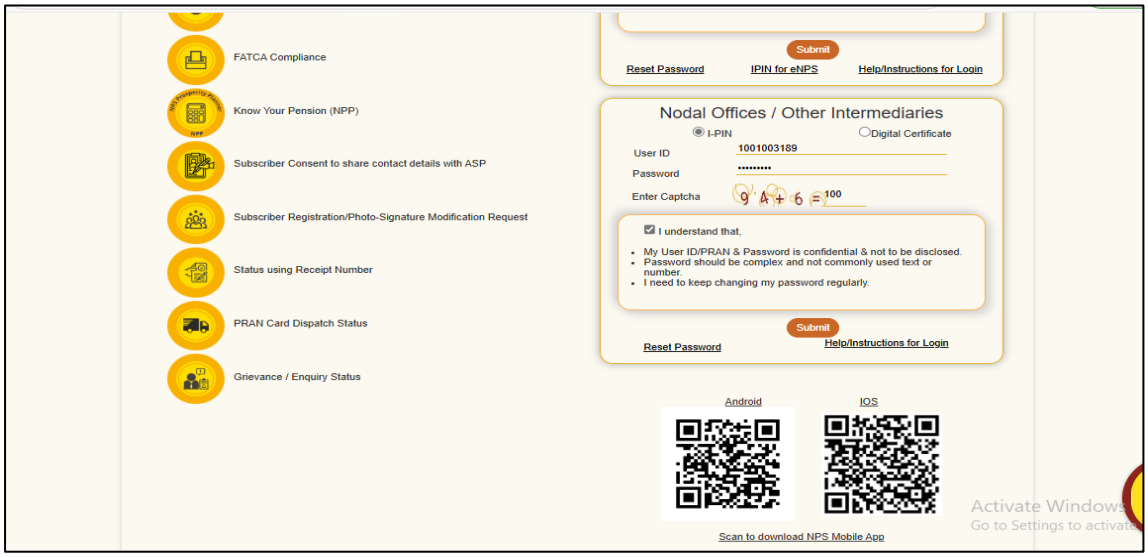


Figure 6

B. The verifier needs to select "Unified Pension Scheme" menu and click on option "**migration to UPS.**"

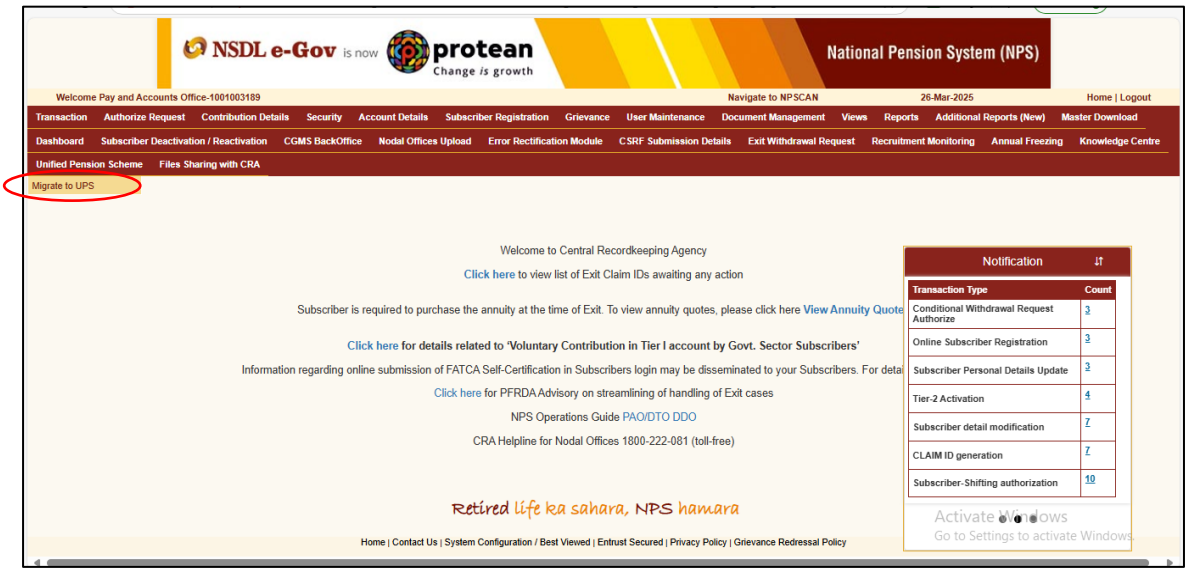


Figure 7

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.

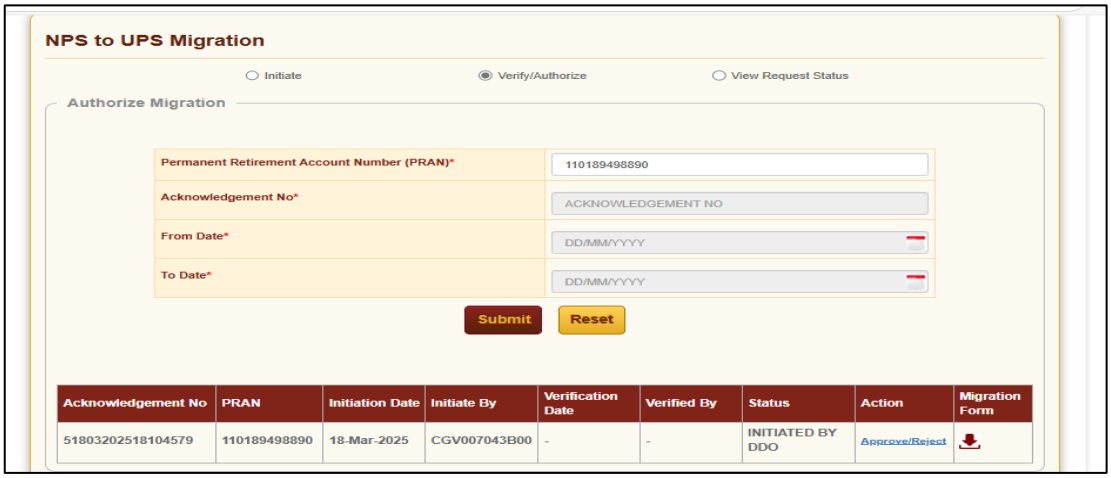


Figure 8

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.

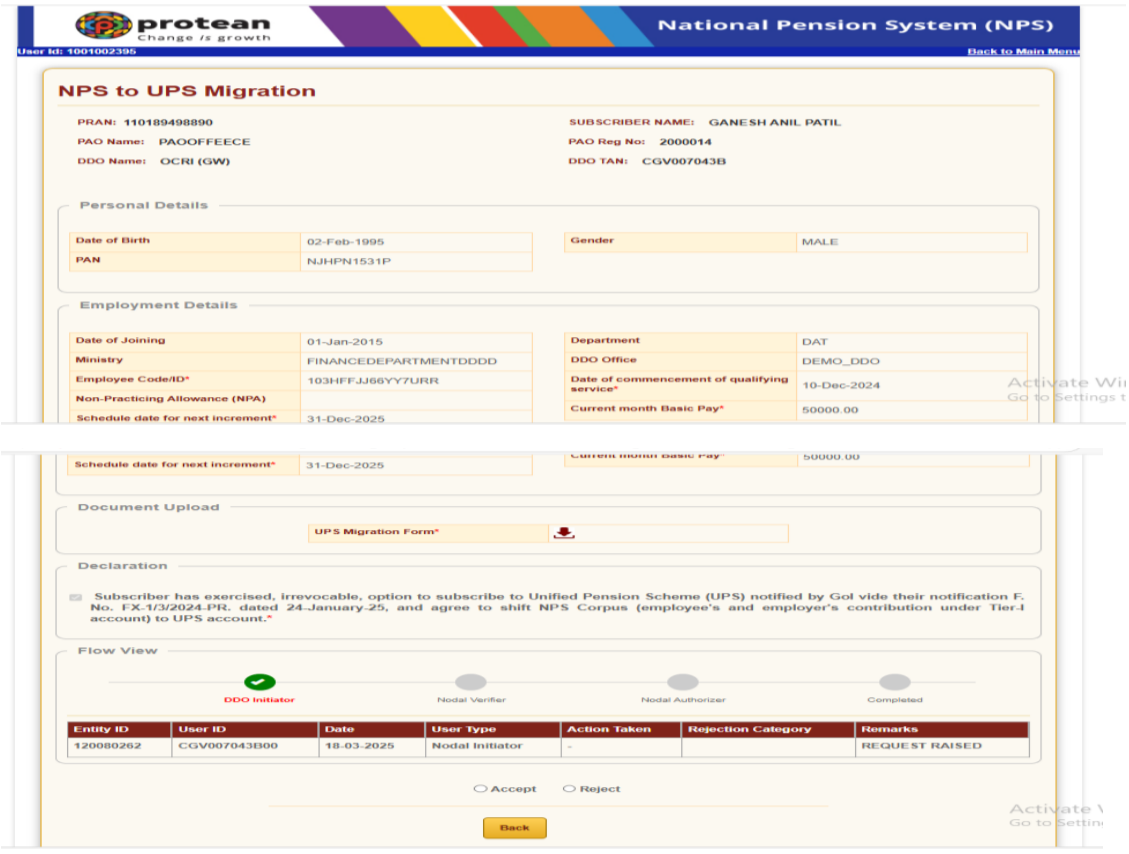


Figure 9

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.

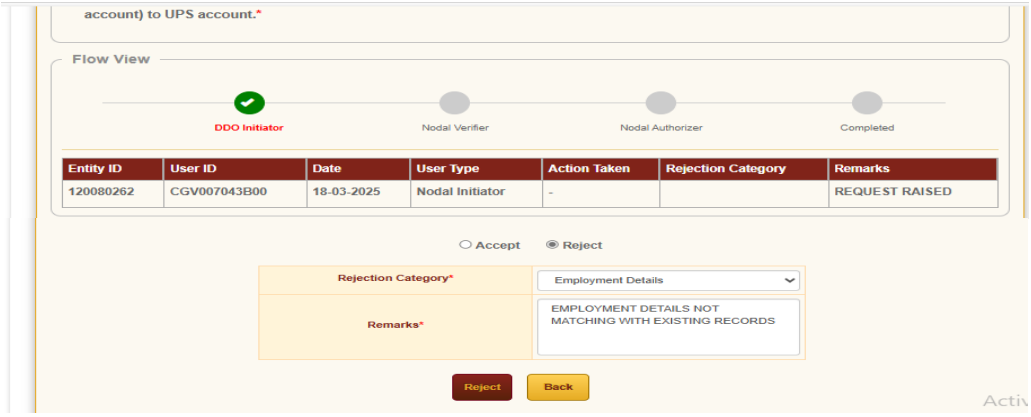


Figure 10

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.

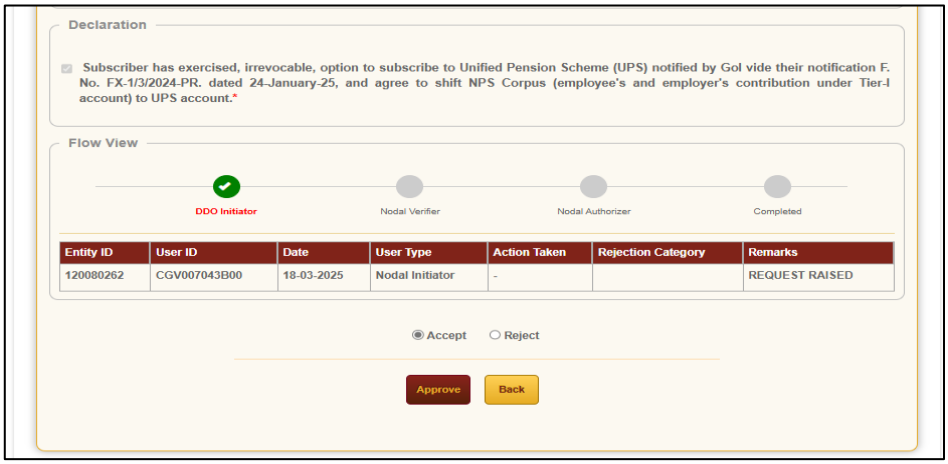


Figure 11

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

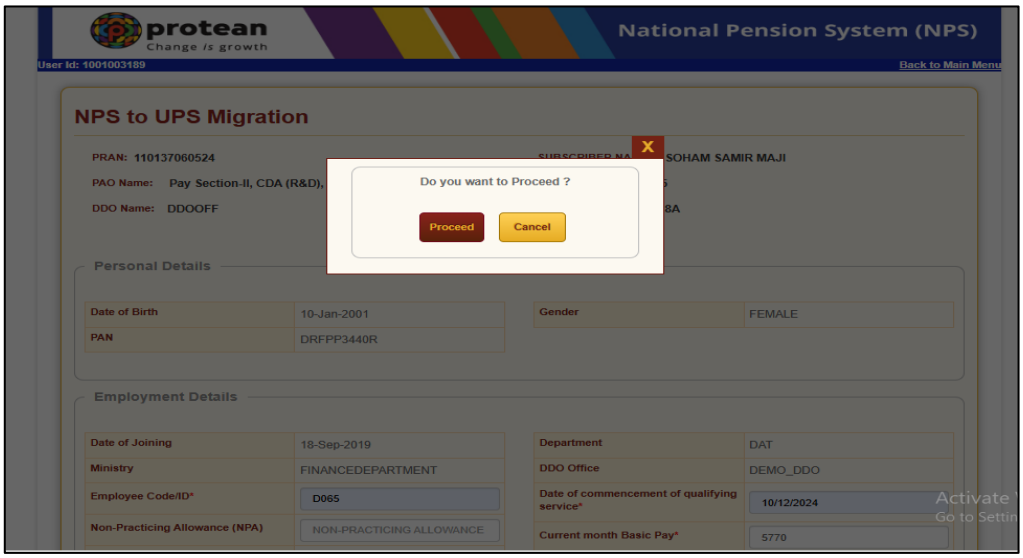


Figure 12

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'.

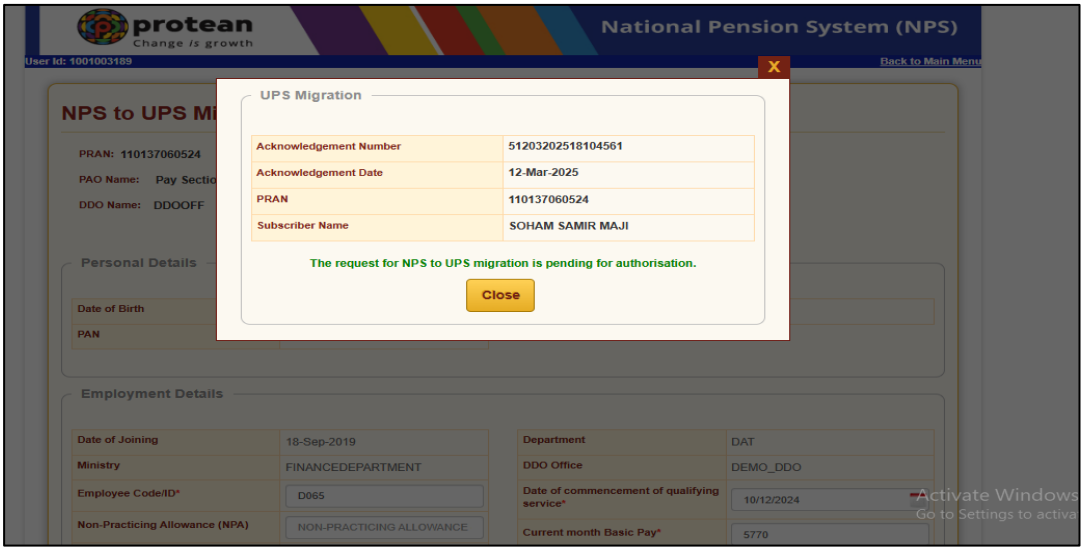


Figure 13

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.

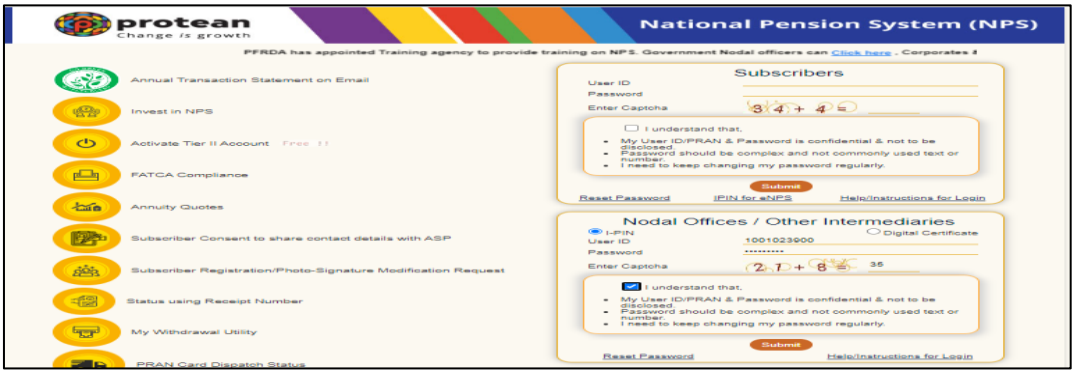


Figure 14

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

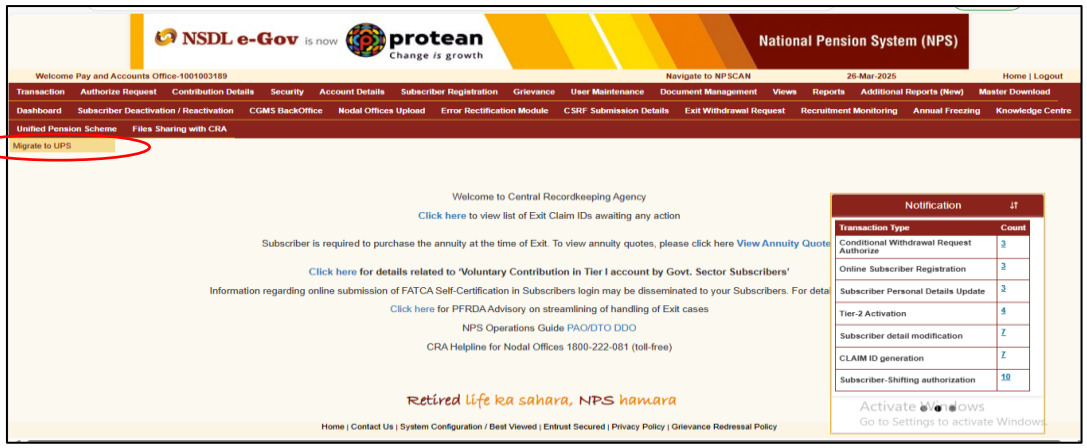


Figure 15

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

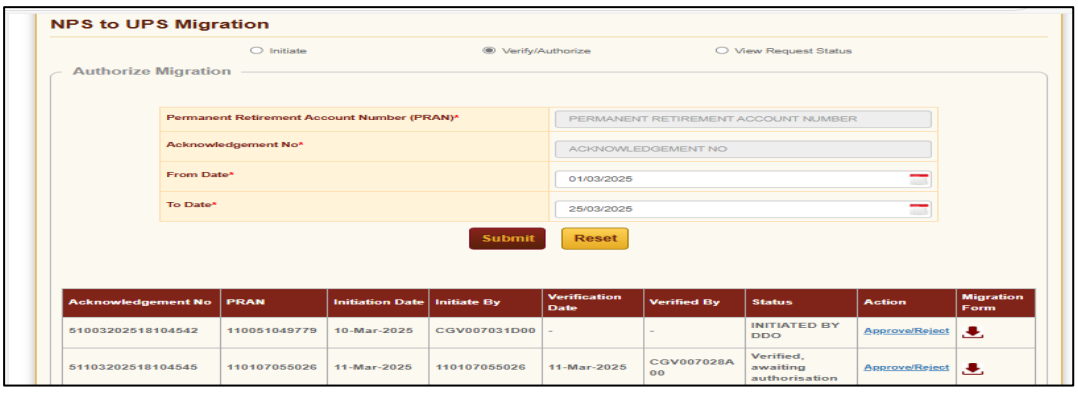


Figure 16

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.

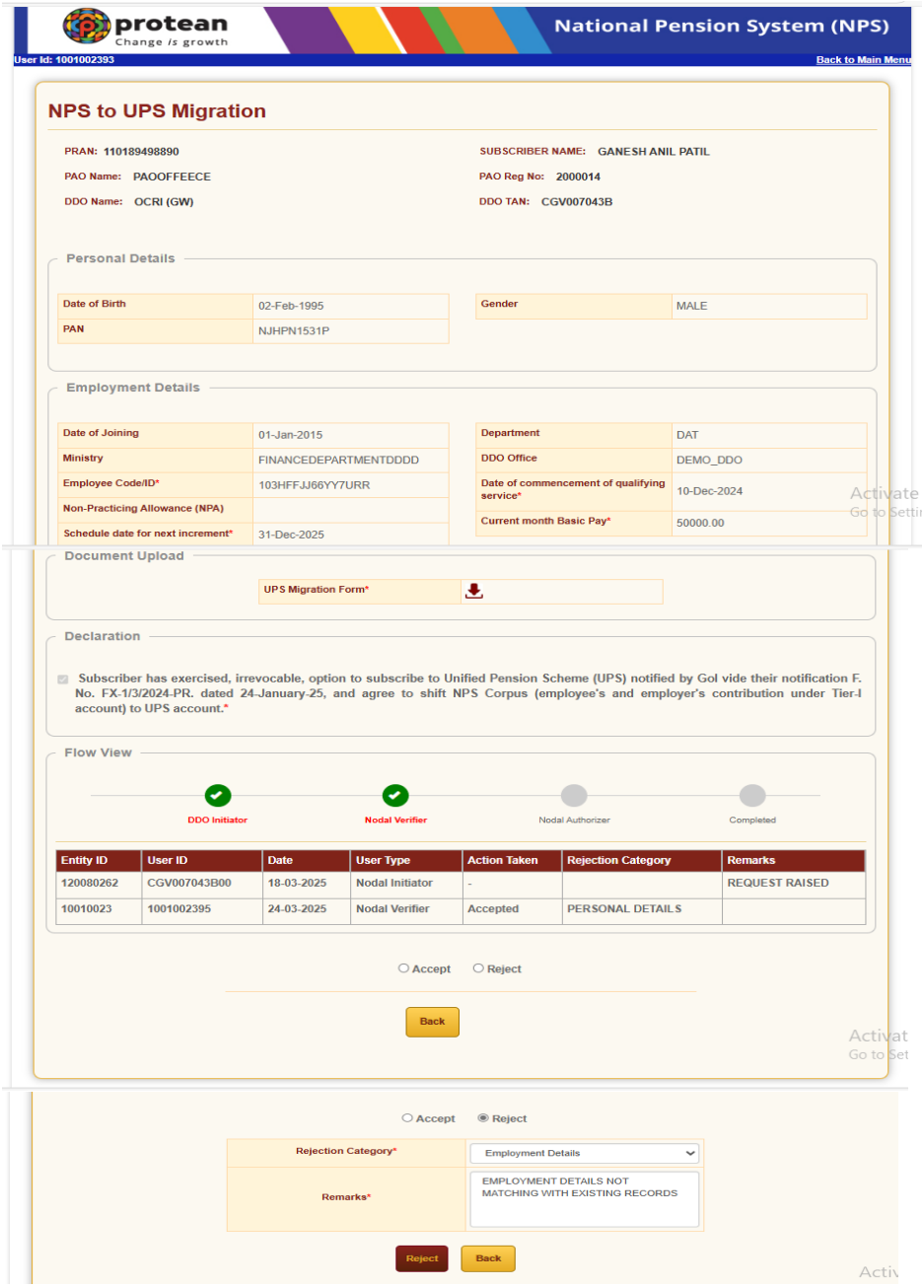


Figure 17

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

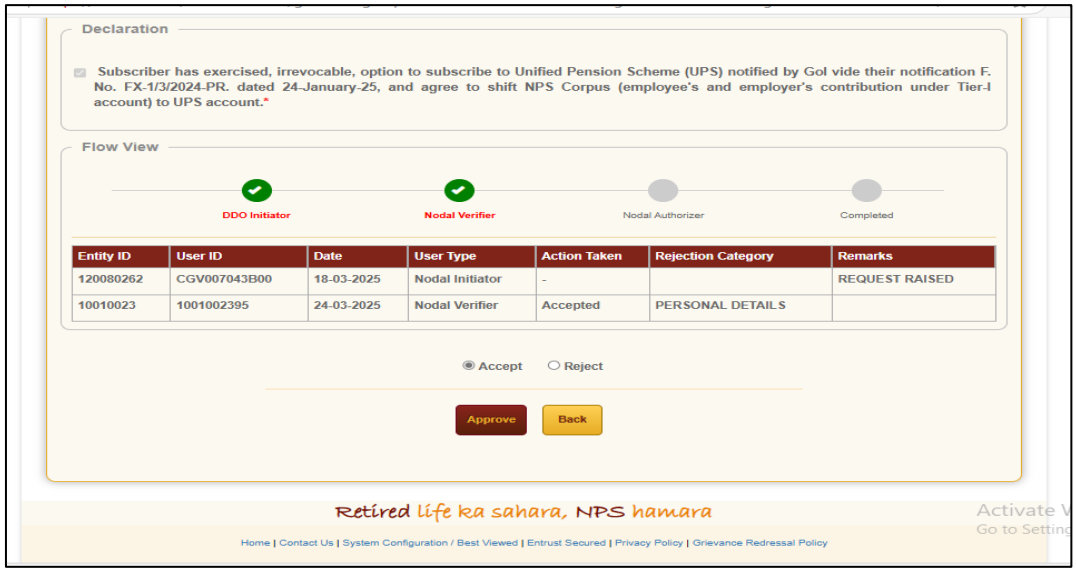


Figure 18

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

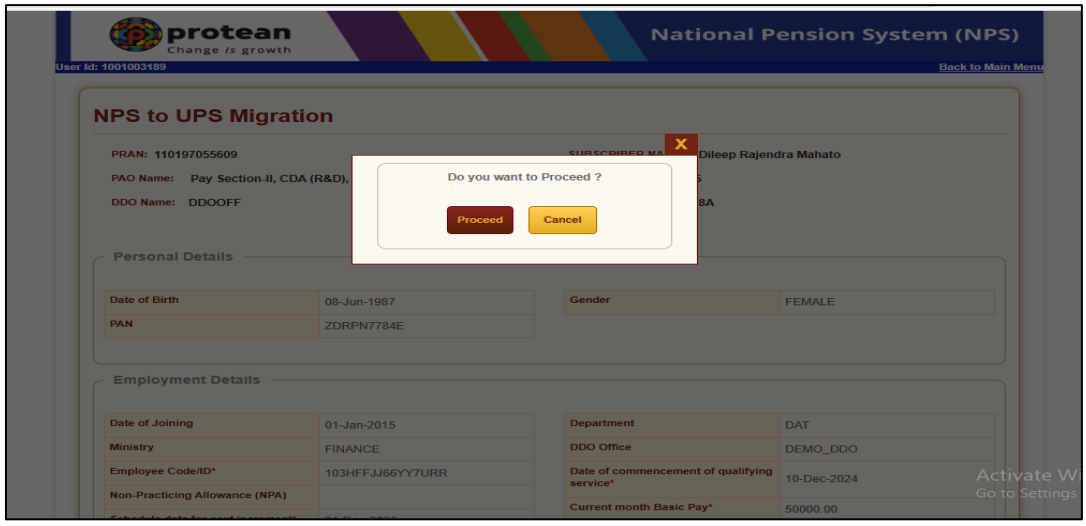


Figure 19

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.'

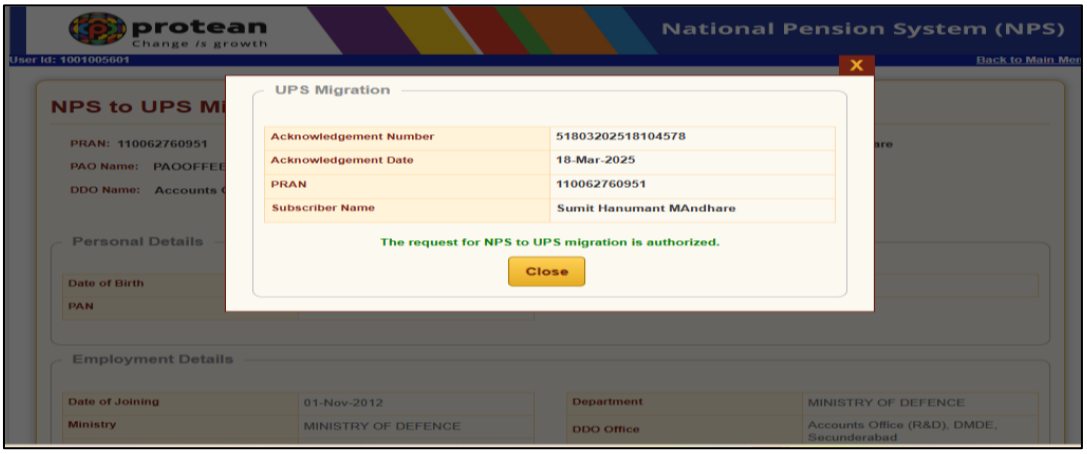


Figure 20

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

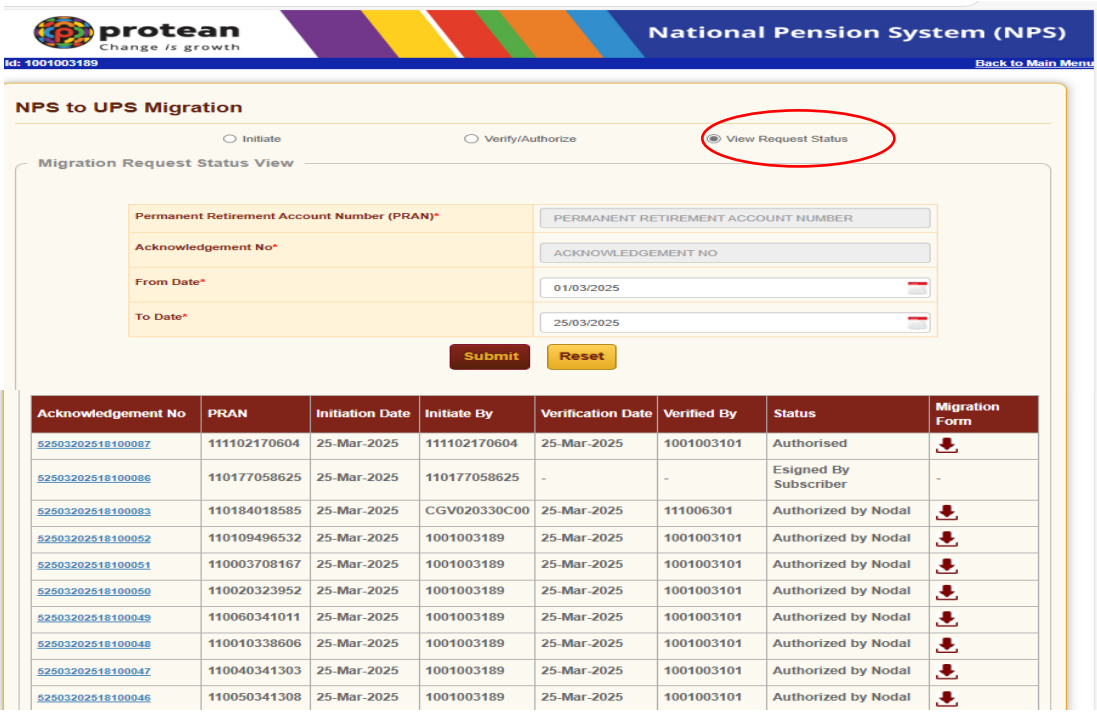


Figure 21

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.

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