

Protean eGov Technologies Limited



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

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Shifting (Migration) from NPS to UPS - Verification by DDO & 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 (Migration) from NPS to UPS - Verification by DDO & 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

Shifting (Migration) from NPS to UPS - Verification by DDO & Authorisation by PAO

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2	Verification of request by DDO
3	Authorization of request by PAO

Shifting (Migration) from NPS to UPS - Verification by DDO & 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, 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 subscriber online and verified by DDO and authorised by PAO.

Shifting (Migration) from NPS to UPS - Verification by DDO & Authorisation by PAO

2. Verification of requests by DDO

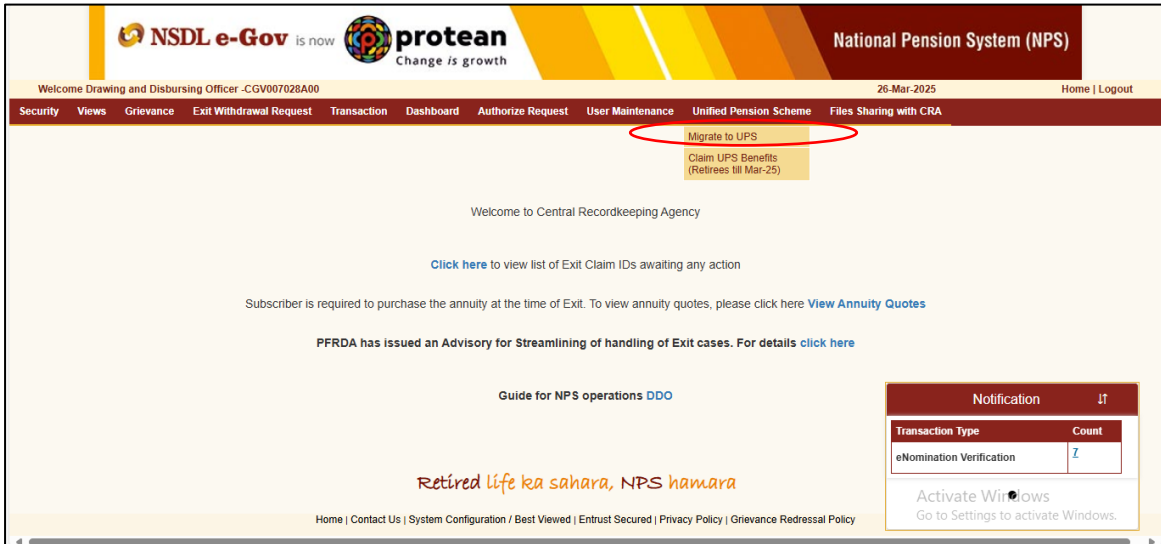
- A. DDO user (henceforth known as verifier) is required to login into the CRA system (<https://cra-nsdl.com/CRA/>) using the User ID and password.



The screenshot shows the CRA login interface. On the left is a sidebar with various service icons. The main area contains a login form for 'Nodal Offices / Other Intermediaries'. The form includes fields for User ID (CGV007043B00), Password, and a Captcha (3 9 4 8 = 47). There are 'Reset Password' and 'Submit' buttons. A 'Help/Instructions for Login' link is also present. Below the login form are QR codes for Android and iOS apps, and a note about activating Windows.

Figure 1

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



The screenshot shows the NPS portal interface. The top navigation bar includes 'Security', 'Views', 'Grievance', 'Exit Withdrawal Request', 'Transaction', 'Dashboard', 'Authorize Request', 'User Maintenance', 'Unified Pension Scheme', and 'Files Sharing with CRA'. The 'Unified Pension Scheme' menu is highlighted with a red circle. Below it, the 'Migrate to UPS' option is also highlighted. The main content area displays a welcome message to the Central Recordkeeping Agency and provides links for viewing exit claim IDs, annuity quotes, and PFRDA advisory. A notification table is visible on the right.

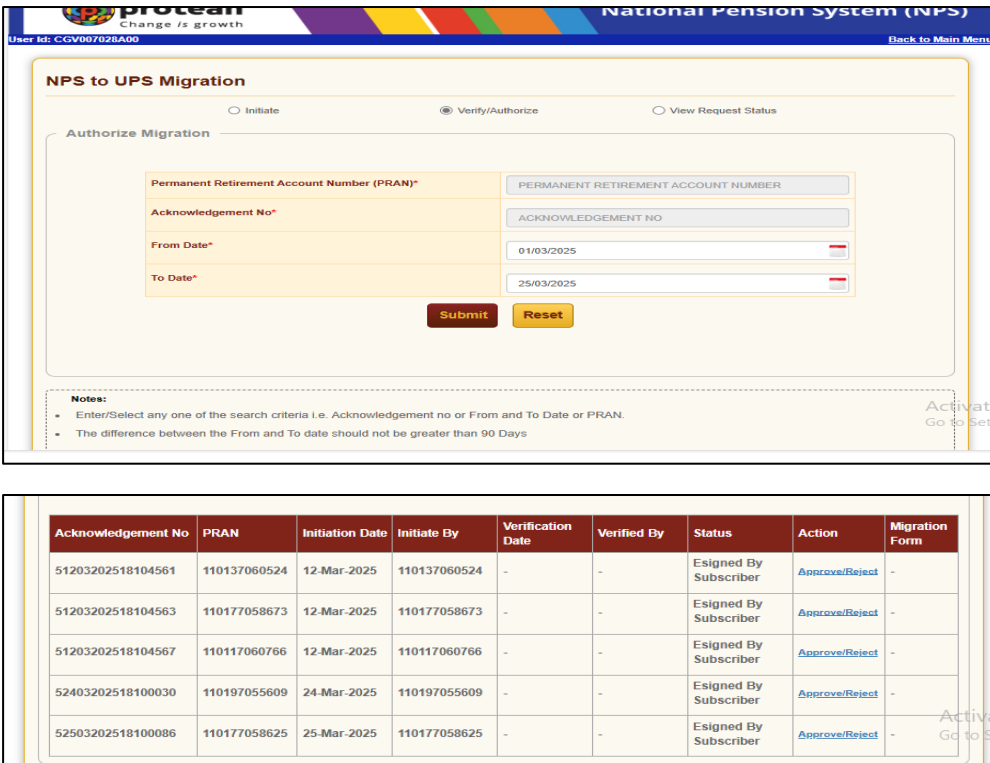
Transaction Type	Count
eNomination Verification	1

Figure 2

Shifting (Migration) from NPS to UPS - Verification by DDO & Authorisation by PAO

- C. Verifier needs to select “Verify/Authorize” tab and provide date range i.e. “From Date” and “To Date” and click on submit. On submission, search records will be displayed on the screen.

Alternatively, PRAN/Acknowledgement no. can be used to view specific request.



The screenshot displays the 'NPS to UPS Migration' interface. At the top, there are three tabs: 'Initiate', 'Verify/Authorize' (selected), and 'View Request Status'. Below the tabs, the 'Authorize Migration' section contains a form with the following fields:

- Permanent Retirement Account Number (PRAN)*
- Acknowledgement No*
- From Date* (01/03/2025)
- To Date* (25/03/2025)

Below the form are 'Submit' and 'Reset' buttons. A 'Notes' section at the bottom states:

- Enter/Select any one of the search criteria i.e. Acknowledgement no or From and To Date or PRAN.
- The difference between the From and To date should not be greater than 90 Days

Below the form, a table displays migration records:

Acknowledgement No	PRAN	Initiation Date	Initiate By	Verification Date	Verified By	Status	Action	Migration Form
51203202518104561	110137060524	12-Mar-2025	110137060524	-	-	Assigned By Subscriber	Approve/Reject	-
51203202518104563	110177058673	12-Mar-2025	110177058673	-	-	Assigned By Subscriber	Approve/Reject	-
51203202518104567	110117060766	12-Mar-2025	110117060766	-	-	Assigned By Subscriber	Approve/Reject	-
52403202518100030	110197055609	24-Mar-2025	110197055609	-	-	Assigned By Subscriber	Approve/Reject	-
52503202518100086	110177058625	25-Mar-2025	110177058625	-	-	Assigned By Subscriber	Approve/Reject	-

Figure 3

Once verifier clicks on “Approve/Reject” link, all the details of the request will be displayed on the screen. (View Figure 4)

Shifting (Migration) from NPS to UPS - Verification by DDO & Authorisation by PAO

- D. The verifier needs to verify the employment details of the employee as per service records. For reasons such as employee not eligible for shifting to UPS or employee has now resigned etc. said request can be rejected. In this process, the verifier needs to select the rejection category as "employment details" and provides remarks and click on reject button.

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User Id: CGV007028A00

Back to Main Menu

NPS to UPS Migration

PRAN: 110197055609 SUBSCRIBER NAME: Dileep Rajendra Mahato
PAO Name: Pay Section-II, CDA (R&D), Hyderabad PAO Reg No: 2000025
DDO Name: DDOOFF DDO TAN: CGV007028A

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*: 103HFFJJ68YY7URR Date of commencement of qualifying service*: DDMM/YYYY
Non-Practicing Allowance (NPA): NON-PRACTICING ALLOWANCE Current month Basic Pay*: BASIC PAY
Schedule date for next increment*: DDMM/YYYY

Document Upload

UPS Migration Form Choose File No file chosen

Note:

- Allowed File Types: pdf, jpg, jpeg
- Allowed File Size upto: 2KB to 5MB.

e-Signed Form

e-Signed Migration Form Upload

☒ 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

Start Subscriber Initiator DDO Verifier Nodal Authorizer Completed

Entity ID	User ID	Date	User Type	Action Taken	Rejection Category	Remarks
110197055609	110197055609	24-03-2025	Initiator	-		REQUEST RAISED
110197055609	110197055609	24-03-2025	Subscriber Initiator	Accepted		REQUEST E SIGNED

☐ Accept ☒ Reject

Rejection Category* Employment Details

Remarks* EMPLOYMENT DETAILS NOT MATCHING WITH EXISTING RECORDS

Reject Back

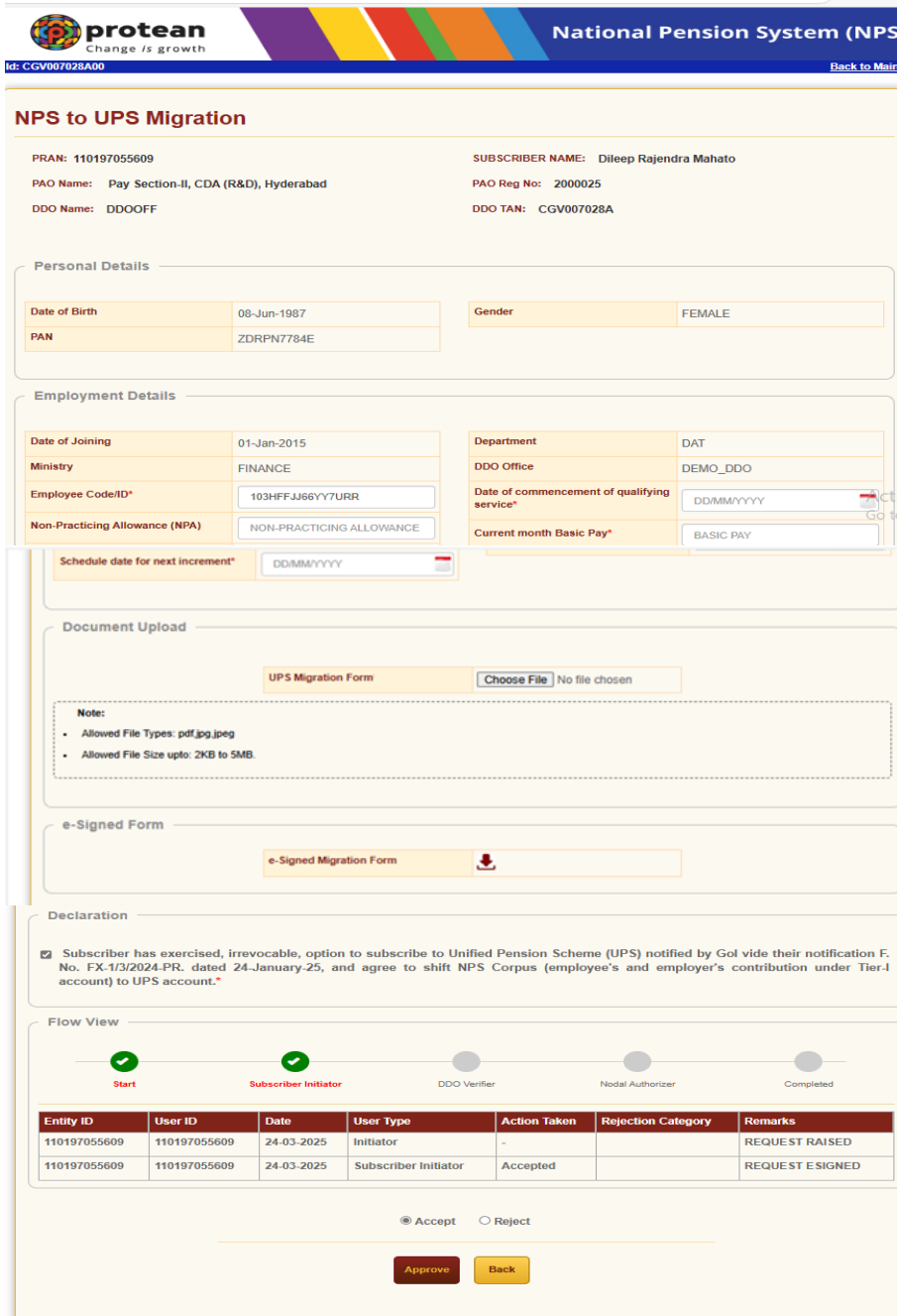
Figure 4

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

Shifting (Migration) from NPS to UPS - Verification by DDO & Authorisation by PAO

E. In case the employee is eligible to shift to UPS based on employment details, as per service record, the verifier needs to enter the following details.

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



NPS to UPS Migration

PRAN: 110197055609 SUBSCRIBER NAME: Dileep Rajendra Mahato
 PAO Name: Pay Section-II, CDA (R&D), Hyderabad PAO Reg No: 2000025
 DDO Name: DDOOFF DDO TAN: CGV007028A

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*: 103HFFJJ66YY7URR Date of commencement of qualifying service*: DDMM/YYYY
 Non-Practicing Allowance (NPA): NON-PRACTICING ALLOWANCE Current month Basic Pay*: BASIC PAY
 Schedule date for next increment*: DDMM/YYYY

Document Upload

UPS Migration Form Choose File No file chosen

Note:

- Allowed File Types: pdf, jpg, jpeg
- Allowed File Size upto: 2KB to 5MB.

e-Signed Form

e-Signed Migration Form Download

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

Start Subscriber Initiator DDO Verifier Nodal Authorizer Completed

Entity ID	User ID	Date	User Type	Action Taken	Rejection Category	Remarks
110197055609	110197055609	24-03-2025	Initiator	-		REQUEST RAISED
110197055609	110197055609	24-03-2025	Subscriber Initiator	Accepted		REQUEST E SIGNED

☒ Accept ☐ Reject

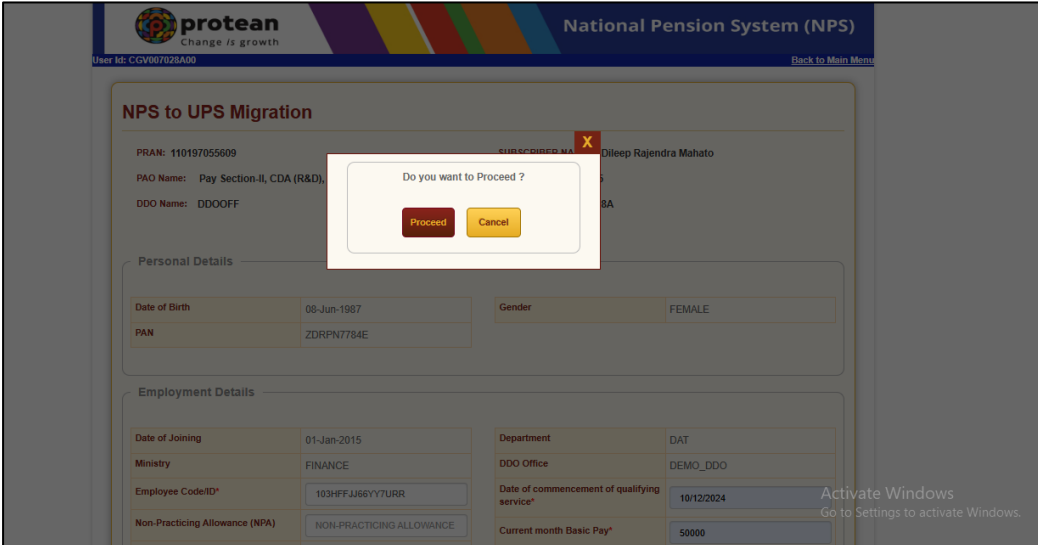
Approve **Back**

Figure 5

After entering the details, verifier needs to select 'Accept' and click on 'Approve' button

Shifting (Migration) from NPS to UPS - Verification by DDO & Authorisation by PAO

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

Do you want to Proceed ?

Proceed Cancel

Personal Details

Date of Birth: 06-Jun-1987
Gender: FEMALE
PAN: ZDRPN784E

Employment Details

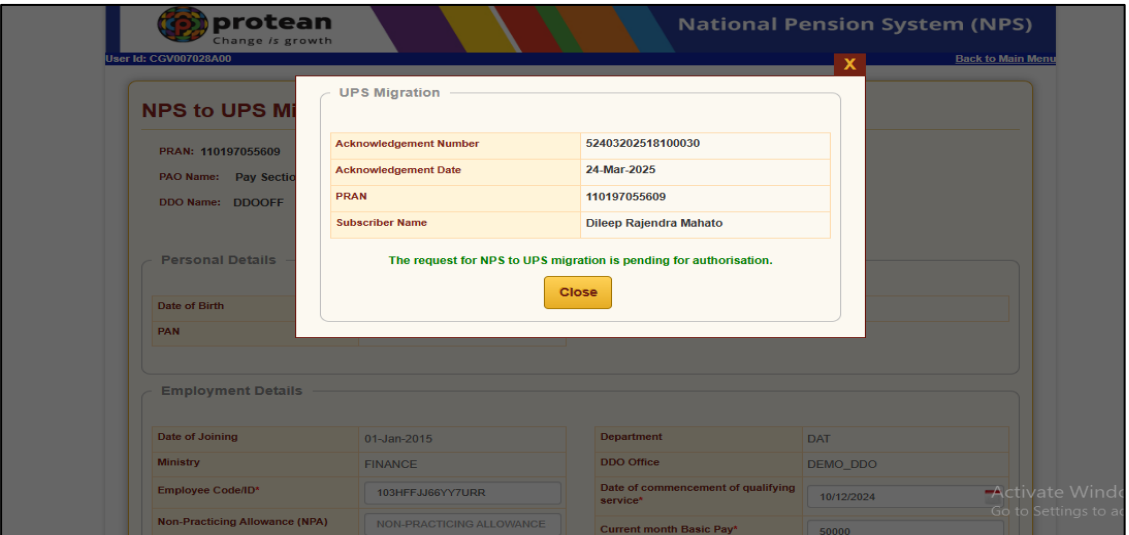
Date of Joining: 01-Jan-2015
Ministry: FINANCE
Employee Code/ID*: 103HFFJJ66YY7URR
Non-Practicing Allowance (NPA): NON-PRACTICING ALLOWANCE

Department: DAT
DDO Office: DEMO_DDO
Date of commencement of qualifying service*: 10/12/2024
Current month Basic Pay*: 50000

Activate Windows
Go to Settings to activate Windows.

Figure 6

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

UPS Migration

Acknowledgement Number: 52403202518100030
Acknowledgement Date: 24-Mar-2025
PRAN: 110197055609
Subscriber Name: Dileep Rajendra Mahato

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

Close

Personal Details

Date of Birth: 06-Jun-1987
PAN: ZDRPN784E

Employment Details

Date of Joining: 01-Jan-2015
Ministry: FINANCE
Employee Code/ID*: 103HFFJJ66YY7URR
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*: 50000

Activate Windows
Go to Settings to activate Windows.

Figure 7

Shifting (Migration) from NPS to UPS - Verification by DDO & Authorisation by PAO

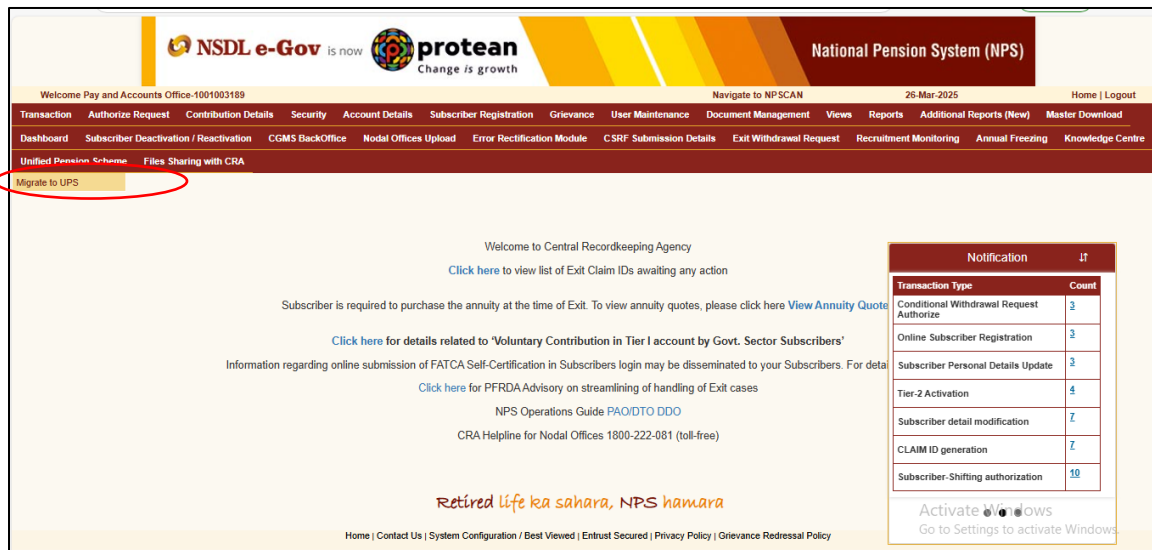
3. Authorization of request by Nodal office

- 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 8

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



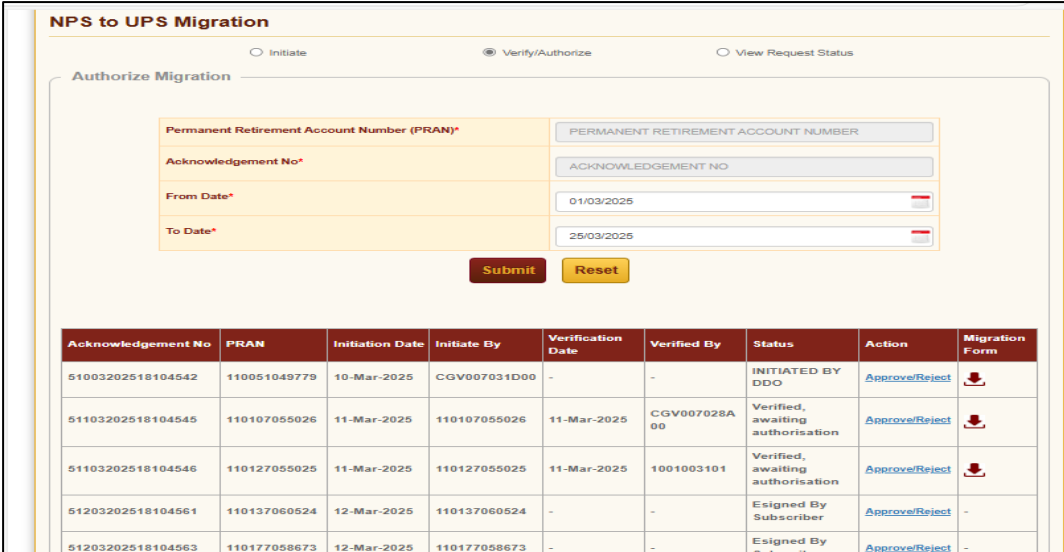
Transaction Type	Count
Conditional Withdrawal Request Authorize	3
Online Subscriber Registration	3
Subscriber Personal Details Update	3
Tier-2 Activation	4
Subscriber detail modification	7
CLAIM ID generation	7
Subscriber Shifting authorization	10

Figure 9

Shifting (Migration) from NPS to UPS - Verification by DDO & Authorisation by PAO

- C. The authorizer needs to select “Verify/Authorize” tab and provide date range i.e. “From Date” and “To Date” and click on submit. On submission, record(s) if any pending for authorization based on the date range will be displayed on the screen.

There is an option of searching for specific requests based on PRAN/Acknowledgement number also.



NPS to UPS Migration

☐ Initiate
 ☒ Verify/Authorize
 ☐ View Request Status

Authorize Migration

Permanent Retirement Account Number (PRAN)*
 Acknowledgement No*
 From Date*
 To Date*

PERMANENT RETIREMENT ACCOUNT NUMBER
 ACKNOWLEDGEMENT NO
 01/03/2025
 25/03/2025





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	
51103202518104545	110107055026	11-Mar-2025	110107055026	11-Mar-2025	CGV007028A00	Verified, awaiting authorisation	Approve/Reject	
51103202518104546	110127055025	11-Mar-2025	110127055025	11-Mar-2025	1001003101	Verified, awaiting authorisation	Approve/Reject	
51203202518104561	110137060524	12-Mar-2025	110137060524	-	-	Esigned By Subscriber	Approve/Reject	-
51203202518104563	110177058673	12-Mar-2025	110177058673	-	-	Esigned By Subscriber	Approve/Reject	-

Figure 10

Once authoriser clicks on “Approve/Reject” link for one request, all the details of the request will be displayed on the screen. (View Figure 11)

Shifting (Migration) from NPS to UPS - Verification by DDO & Authorisation by PAO

- D. The authoriser can reject the request for any specific reason. In this process, the authoriser needs to select the rejection category as “employment details” and provides remarks and click on reject button.


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National Pension System (NPS)

User Id: 1001003189

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NPS to UPS Migration

PRAN: 110197055609
 SUBSCRIBER NAME: Dileep Rajendra Mahato

PAO Name: Pay Section-II, CDA (R&D), Hyderabad
 PAO Reg No: 2000025

DDO Name: DDOOFF
 DDO TAN: CGV007028A

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*	103HFFJJ66YY7URR	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

e-Signed Form

e-Signed 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

Start

Subscriber Initiator

DDO Verifier

Nodal Authorizer

Completed

Entity ID	User ID	Date	User Type	Action Taken	Rejection Category	Remarks
110197055609	110197055609	24-03-2025	Subscriber Initiator	-		REQUEST RAISED
110197055609	110197055609	24-03-2025	Subscriber Initiator	Accepted		REQUEST SIGNED
120080114	CGV007028A00	26-03-2025	Nodal Verifier	Accepted		

☐ Accept
 ☒ Reject

Rejection Category*

Employment Details

Remarks*

EMPLOYMENT DETAILS NOT MATCHED

Reject

Back

Figure 11

Shifting (Migration) from NPS to UPS - Verification by DDO & Authorisation by PAO

- E. In case the employee is eligible for shifting to UPS and details are correct, the authoriser needs to select 'Accept' and click on 'Approve' button.

☒ 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

Start

Subscriber Initiator

DDO Verifier

Nodal Authorizer

Completed

Entity ID	User ID	Date	User Type	Action Taken	Rejection Category	Remarks
110197055609	110197055609	24-03-2025	Subscriber Initiator	-		REQUEST RAISED
110197055609	110197055609	24-03-2025	Subscriber Initiator	Accepted		REQUEST E SIGNED
120080114	CGV007028A00	26-03-2025	Nodal Verifier	Accepted		

☒ Accept
 ☐ Reject

Approve


Back

Retired life ka sahara, NPS hamara

Activate W
Go to Settings

Figure 12

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


National Pension System (NPS)

User Id: 1001003189
 Back to Main Menu

NPS to UPS Migration

PRAN: 110197055609
 PAO Name: Pay Section-II, CDA (R&D),
 DDO Name: DD00FF

Do you want to Proceed ?

Proceed

Cancel

Personal Details

Date of Birth

09-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*

103HFFJJ66YY7URR

Date of commencement of qualifying service*

10-Dec-2024

Non-Practicing Allowance (NPA)

Current month Basic Pay*

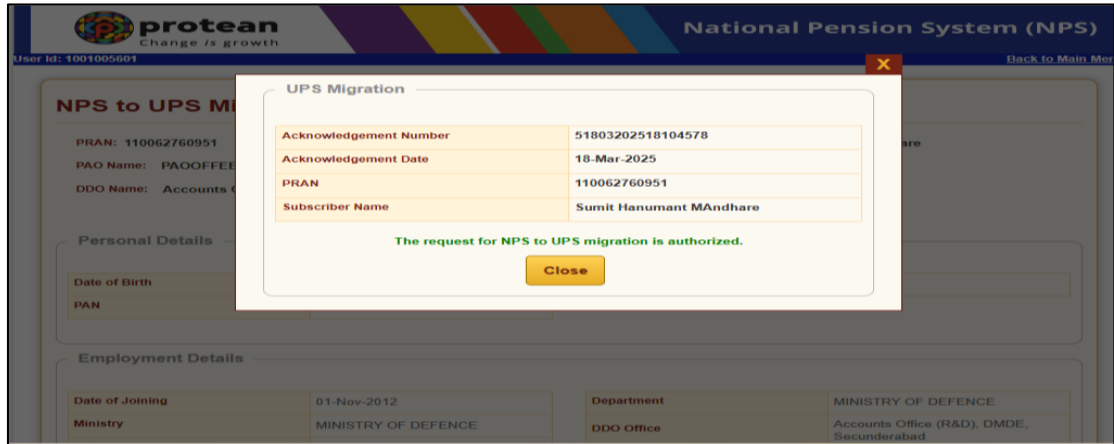
50000.00

Activate W
Go to Settings

Figure 13

Shifting (Migration) from NPS to UPS - Verification by DDO & 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.’



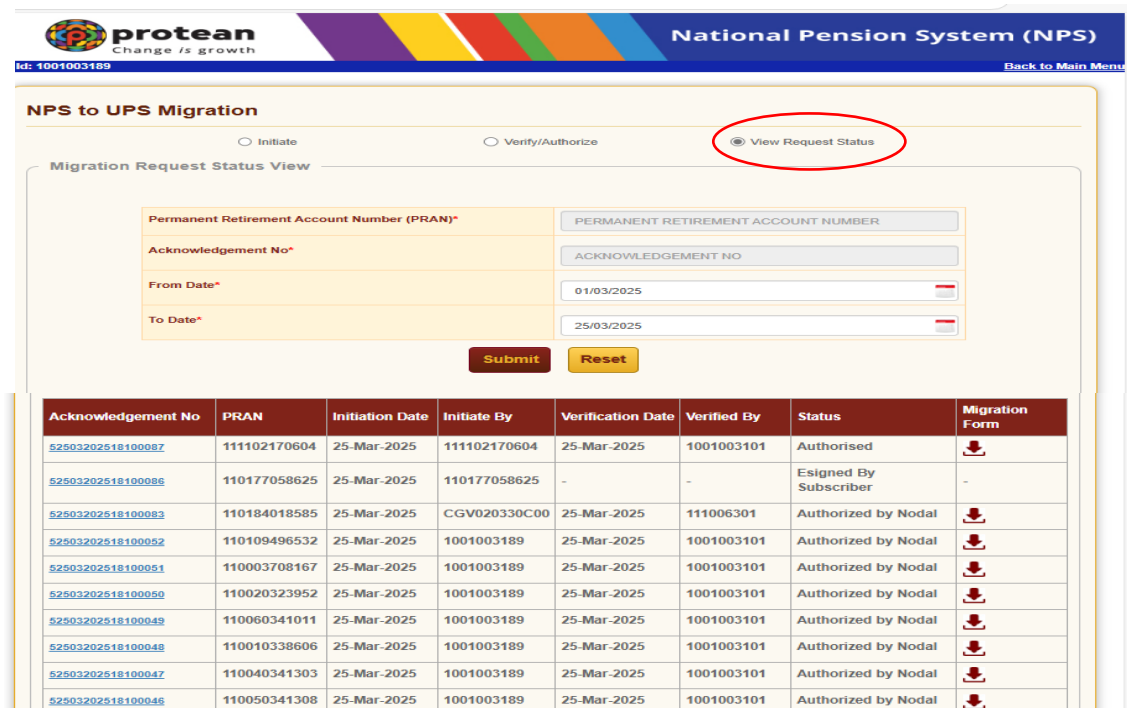
The screenshot shows the 'NPS to UPS Migration' window. A modal box displays the following details:

Acknowledgement Number	51803202518104578
Acknowledgement Date	18-Mar-2025
PRAN	110062760951
Subscriber Name	Sumit Hanumant MANDHARE

Below the details, a green message states: "The request for NPS to UPS migration is authorized." with a "Close" button.

Figure 14

Status View: The nodal office can check the request status by selecting ‘view request status’ and enter date range for PRAN/Acknowledgement No.



The screenshot shows the 'NPS to UPS Migration' interface with the 'View Request Status' option selected. Below the selection buttons, there are input fields for 'Permanent Retirement Account Number (PRAN)*', 'Acknowledgement No*', 'From Date*', and 'To Date*'. A table below these fields displays the migration request status.










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

Figure 15

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.
