Protean eGov Technologies Limited

Standard Operating Procedures

For

Options available for Corporate Nodal Office

Version 1.1

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REVISION HISTORY

Sr. No.	Date of Revision	Ver	Section Number	Description of Change
1	28-01-2025	1	-	Options available for Corporate Nodal Office
2	04-04-2025	1.1	-	Reviewed and Updated screenshots are incorporated.

Protean e-GOV Technologies Limited

A. Online employee details verification to respective corporate for PRAN generated in NPS

1. Preface

As per the regulatory requirement, employee details verification is required to be done by a corporate for their underlying employees at the time of subscriber registration under NPS. Currently the process of verification is done in the following ways:

- Offline (Stamp and sign) on subscriber registration form (CSRF) submitted to POP for PRAN generation through offline or online (OPGM) mode
- Online employee details verification in the login provided to respective corporate for PRAN generated through eNPS/myNPS portal (voluntary option adopted by corporate).

In order to aid the corporate in bringing down the turnaround time for PRAN generation and also to help in handling NPS operations efficiently, we have extended the functionality of online employee details verification for all the subscriber registration modes. The verification to be carried out by the corporate shall be a simple two-step process. Under this functionality, once PRAN is successfully generated in the CRA system, the list of subscribers registered under the corporate will be made available in the login provided to respective corporate for employee details verification. Please note, in case PRAN is generated using PAN (on the basis of existing relationship with the POP/Service Provider), the PRAN is provided for employment verification only after the KYC verification is successfully done by the POP (service Provider). Post successful verification, PRAN will be made into active status in CRA system, with an association with the respective corporate. In case of rejection, PRAN will be associated with 'All Citizens of India' sector under the concerned POP.

2. Steps to be followed by the Corporate for employee confirmation are as under:

The Corporate will have 'Password' based authentication to perform the operational activities related to subscriber registration. CRA will create User ID for the Corporate for accessing the CRA system, based on the written request received from the Corporate / POP. Post this, a link will be sent to the registered mail id of the user for creating a password.

In case the user forgets the password, the same can be re-set by using "Go to Nodal Office" option available in forgot password option available below the login field. The user will have to provide his/her details along with the new password details. Post capturing of a re-set request, an acknowledgement no will be generated by CRA and reflected on the screen. The corporate has to send the acknowledgement no to CRA for verification &

authorization, after which the password provided by the user will be active in the CRA system. :

Step 1: Corporate User will login into CRA system and access the option Corporate Employee Confirmation under the Subscriber Registration menu as shown in **Figure 1** for employee details verification.

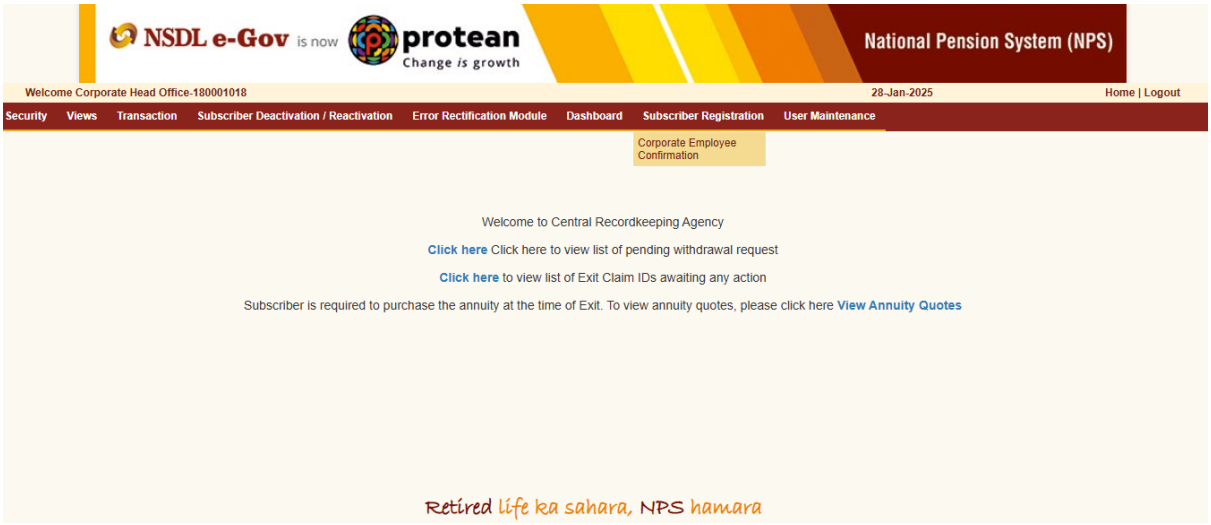


Figure 1

Step 2: The Corporate User shall enter necessary details to search for the records to be verified. The search can be based on PRAN, Acknowledgment No. or Date Range. The date range for the search cannot be greater than 15 days. Verification Status should be selected as 'To be verified'.

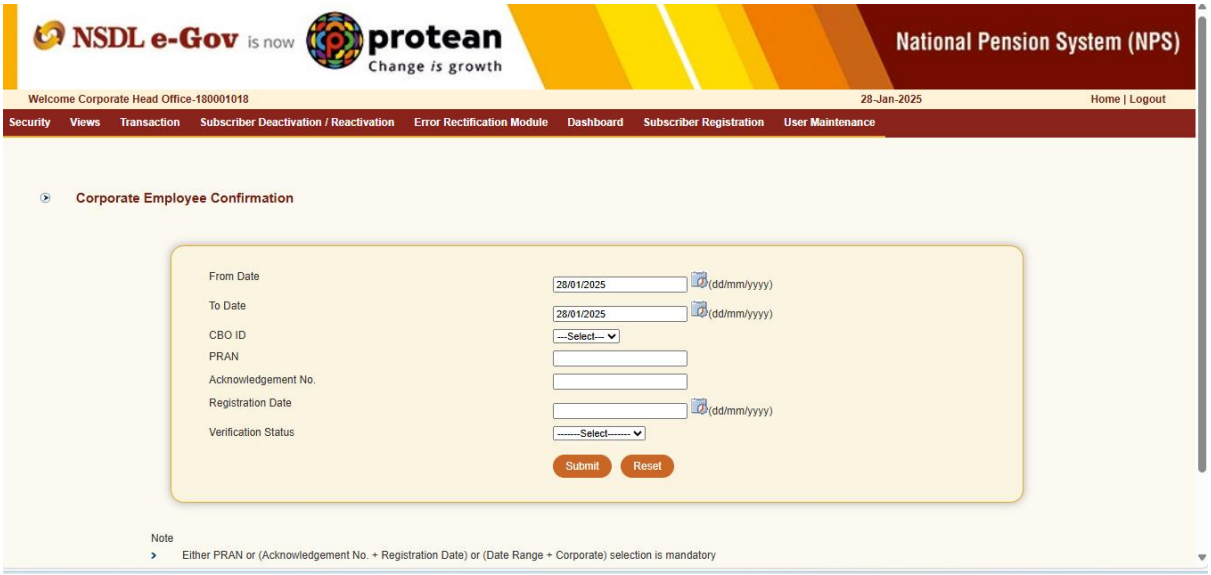


Figure 2

Step 3: In case of search output, based on date range, the list of PRAN which are pending for employee verification within the date range will be reflected as shown in **Figure 3**. The Subscriber details as shown below in **Figure 4**, will be displayed once the user clicks on the PRAN. The Corporate User will verify and compare the details provided by Subscriber in NPS with the details available in the corporate database.

Figure 3

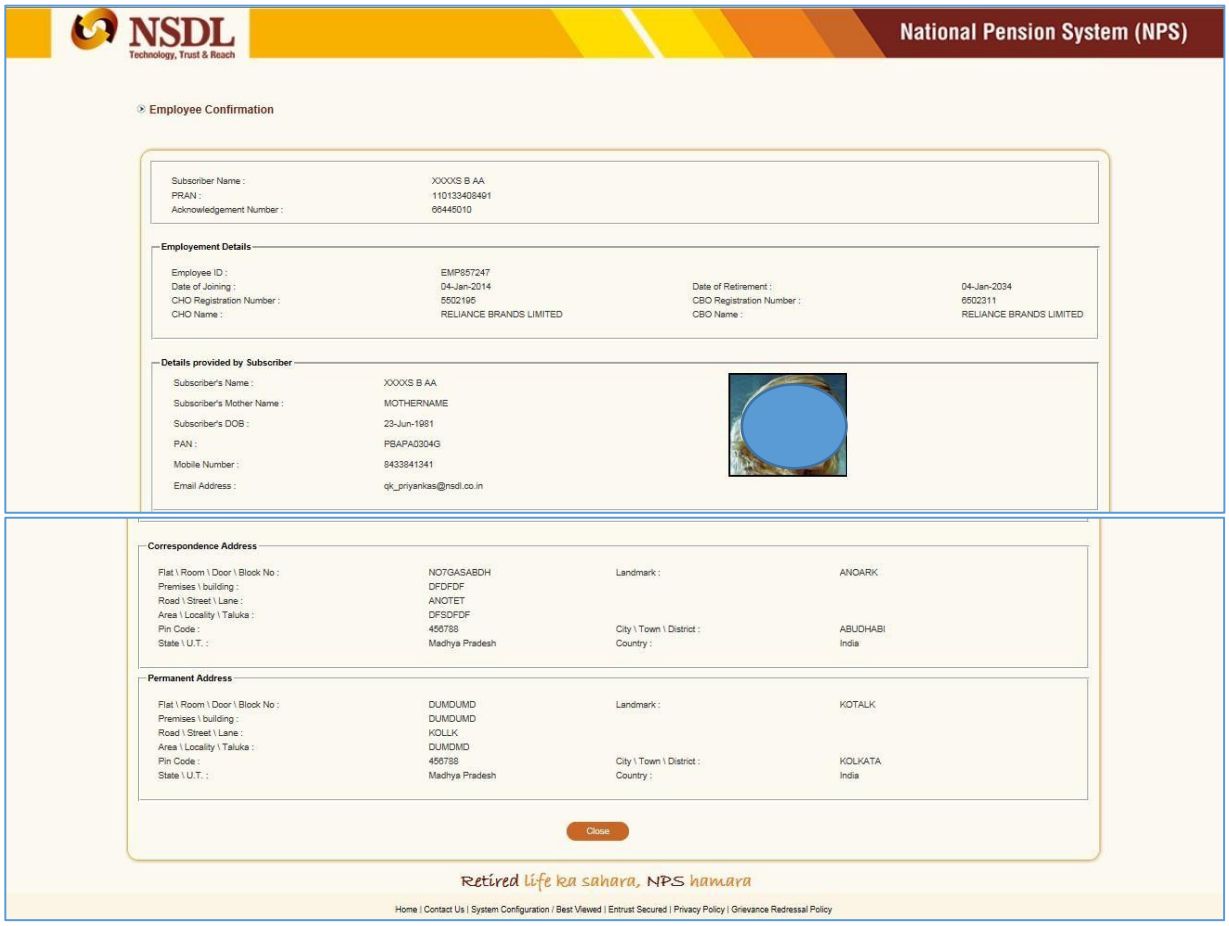


Figure 4

Step 4: In case the subscriber details available in the CRA system matched with the employee details available with the corporate, then the corporate user shall click in the checkbox 'Accept' & click on 'Confirm' so as to complete the verification. The same is shown below in **Figure 5**. Once the employee is successfully verified by corporate, PRAN will be activated in CRA system.

Figure 5

Step 5: In case the subscriber details available in the CRA system does not matched with the employee details available with the corporate, and the corporate wants to reject the subscriber verification, then the corporate user shall click in the checkbox 'Reject', and will select the Rejection Reason & click on 'Confirm' so as to complete the verification. The same is shown below in Figure 6 and Figure 7.

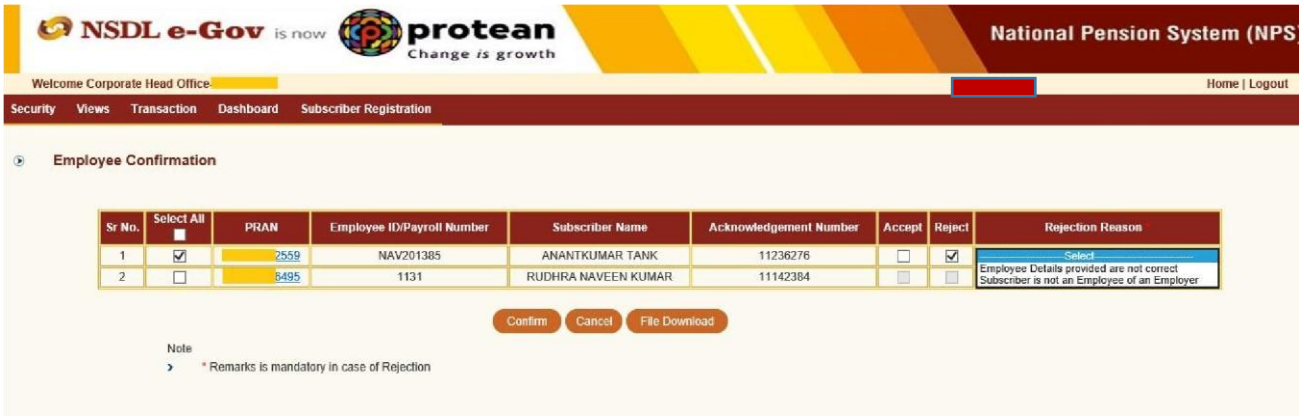


Figure 6

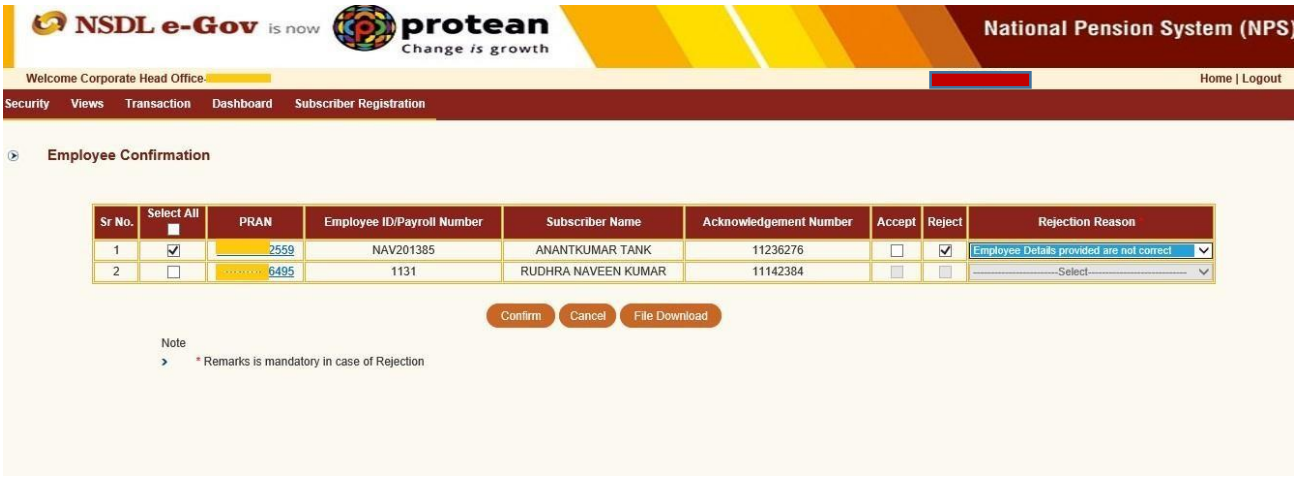


Figure 7

The Corporate User shall also download the list of file pending for employee confirmation by clicking on File Download option. The same is shown below in **Figure 8.**

Figure 8

B. For Subscriber Shifting request to be Captured and Authorized by the Corporate

1. Preface

As a part of the development process through the e-NPS online module, the functionality for 'Subscriber Shifting' has been made available to the corporate for shifting the subscribers (employed with the said corporate and having a PRAN under NPS with another entity/sector).

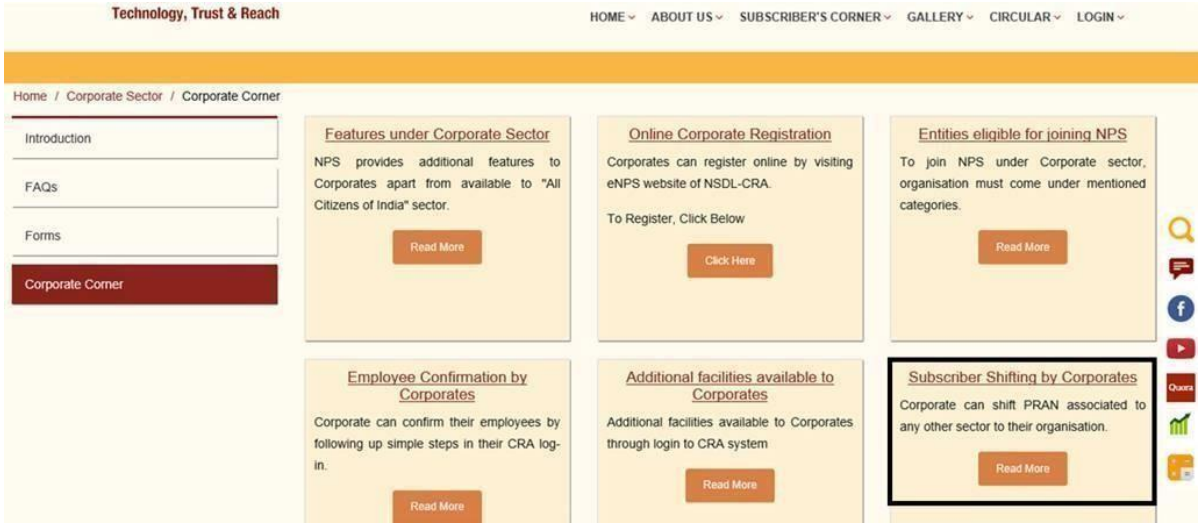
In order to aid the corporate in bringing down the turnaround time for shifting the subscribers and also to help in handling NPS operations efficiently, we have extended the said functionality to shift the subscribers.

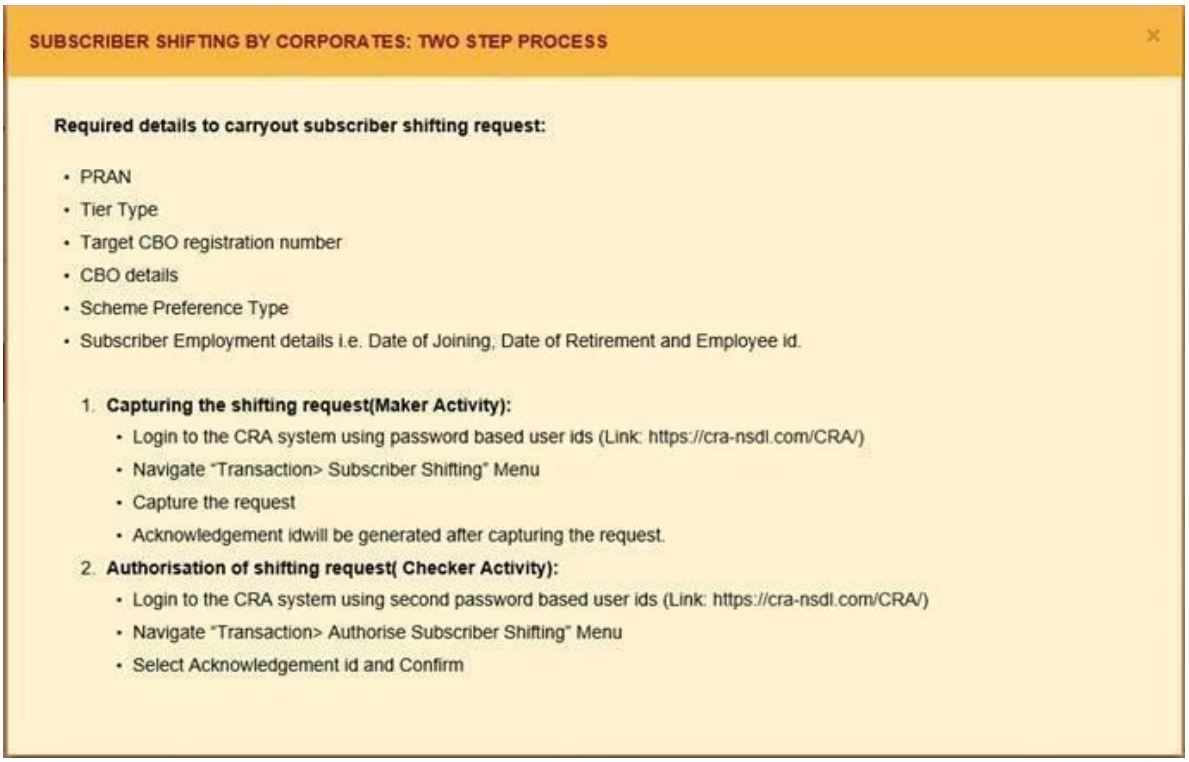
This functionality is available to the corporates registered through e-NPS through the password based user ids made available by Protean CRA.

2. Steps to be followed by the Corporate for Shifting Subscribers:

The steps to shift the subscribers are available at the CRA corporate website:

https://npscra.nsdl.co.in/corporate-corner.php



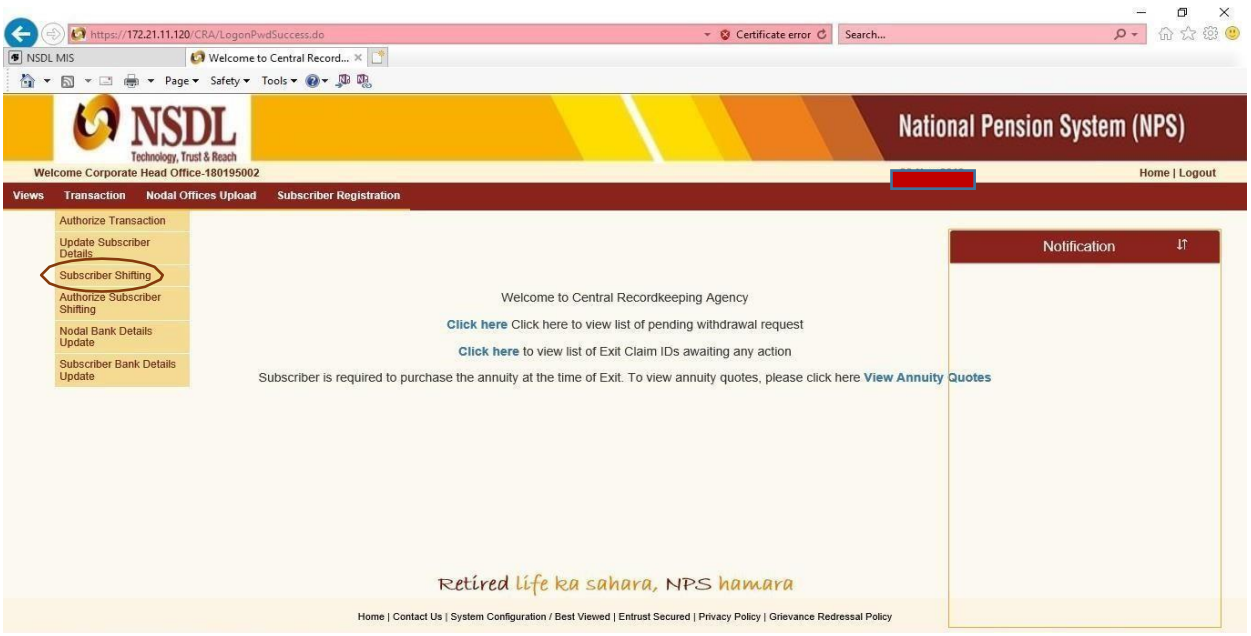


The Request has to be captured by the maker user (USER ID 1) of the corporate and has to be authorized by the checker user (USER ID 2) of the corporate.

Below are the screens through which the corporate after accessing the CRA systems has to navigate to complete the shifting request.

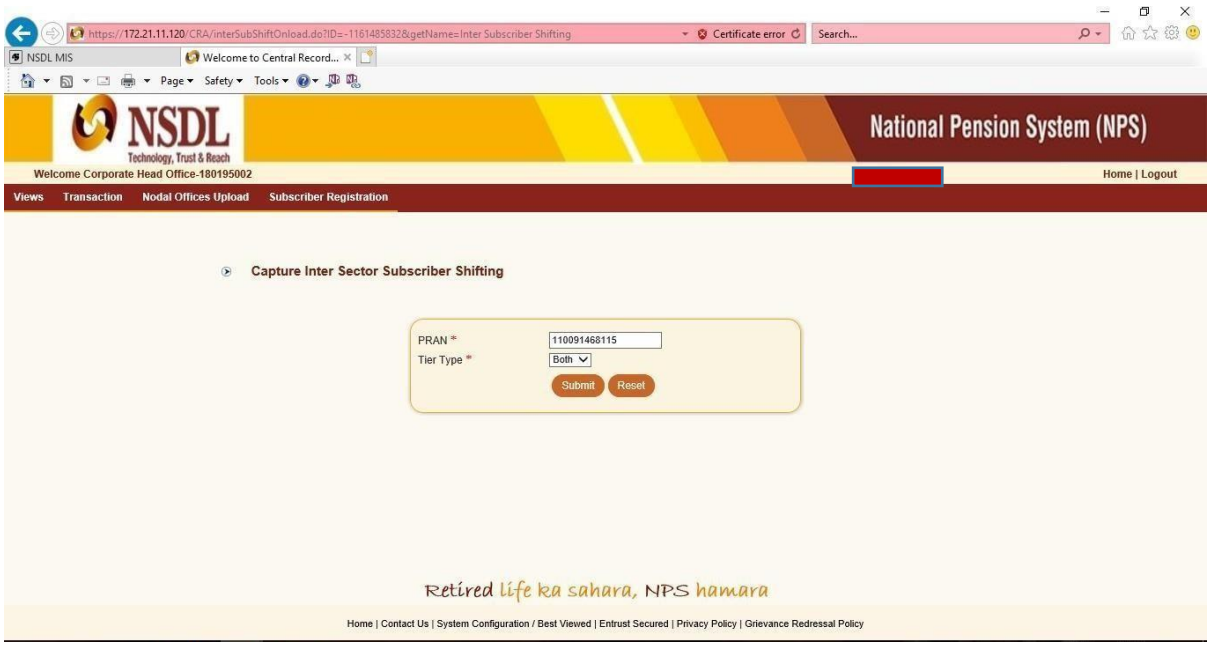
Step 1:

The Corporate accesses the CRA system https://cra-nsdl.com/CRA/ using 'USER ID 1'.



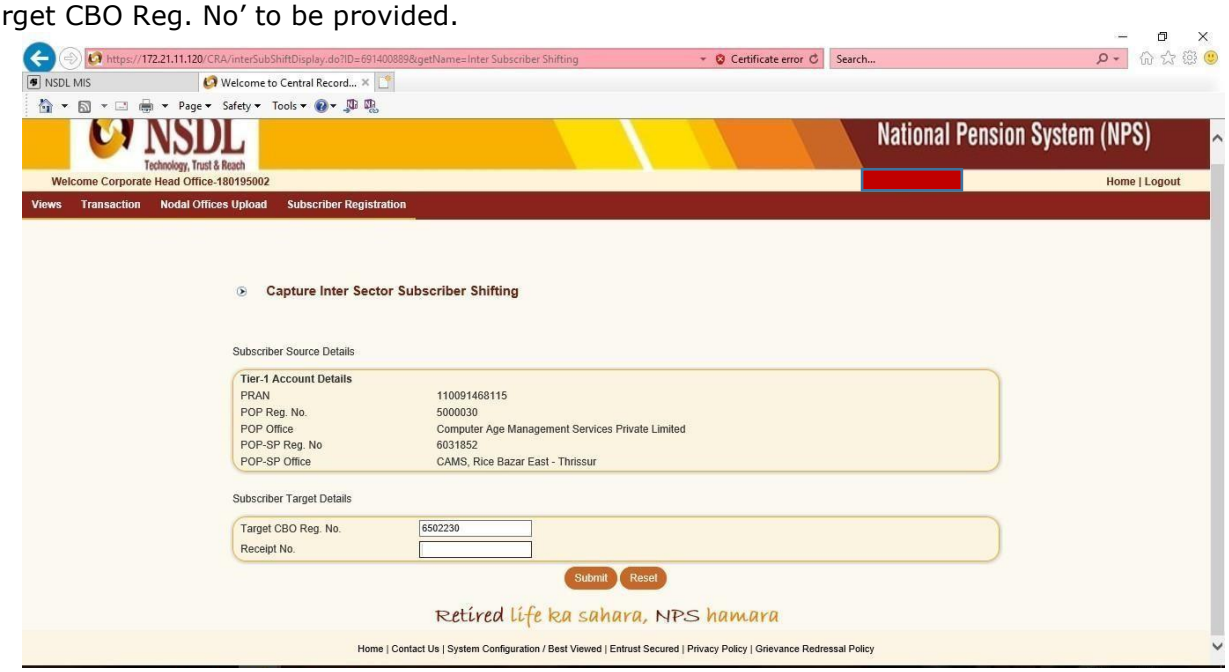
Step 2:

Provide PRAN to be shifted.



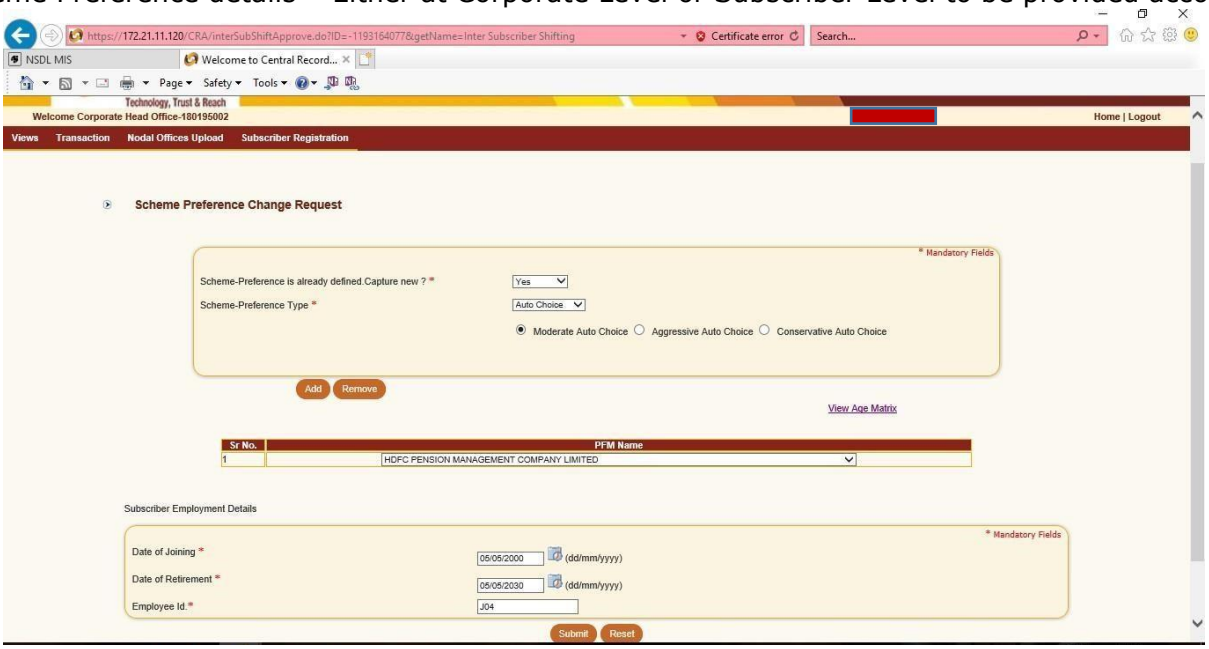
Step 3 :

'Target CBO Reg. No' to be provided.



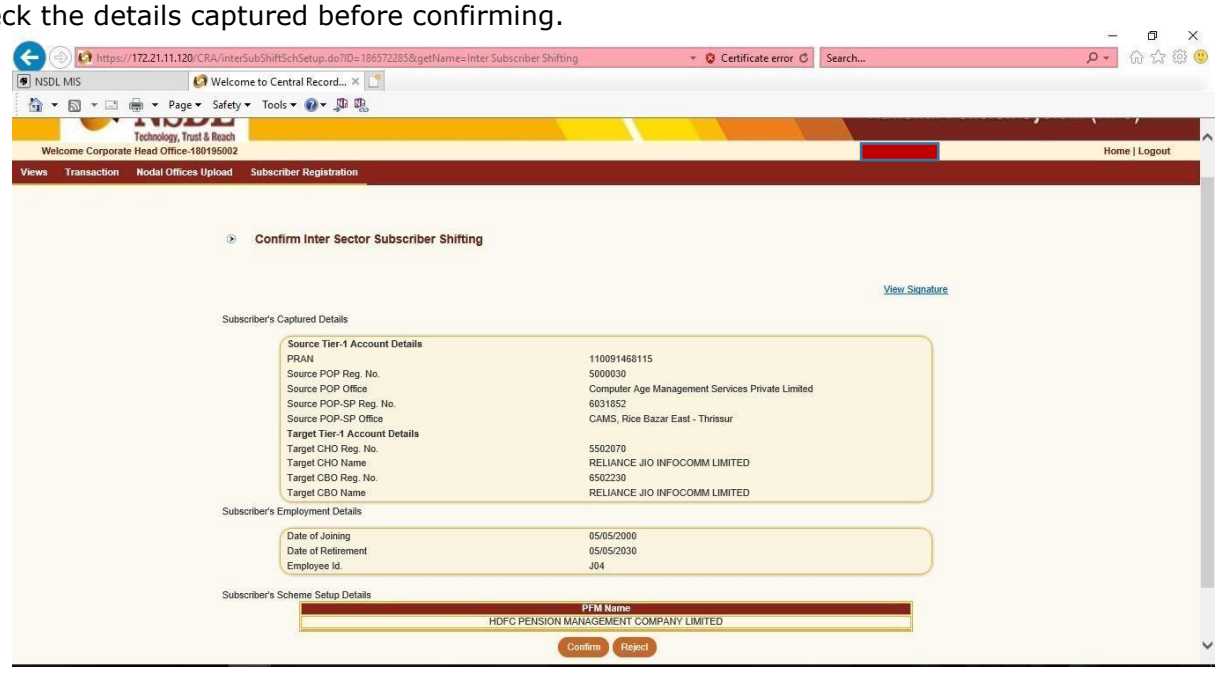
Step 4 :

Scheme Preference details – Either at Corporate Level or Subscriber Level to be provided accordingly



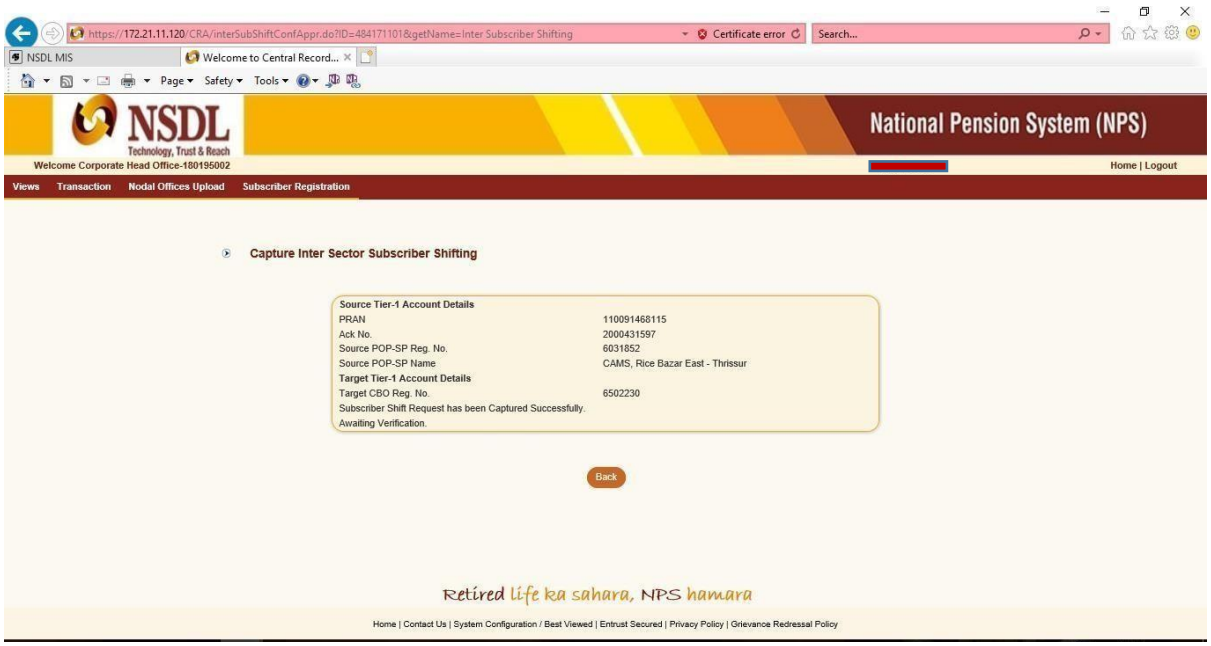
Step 5:

Check the details captured before confirming.



Step 6:

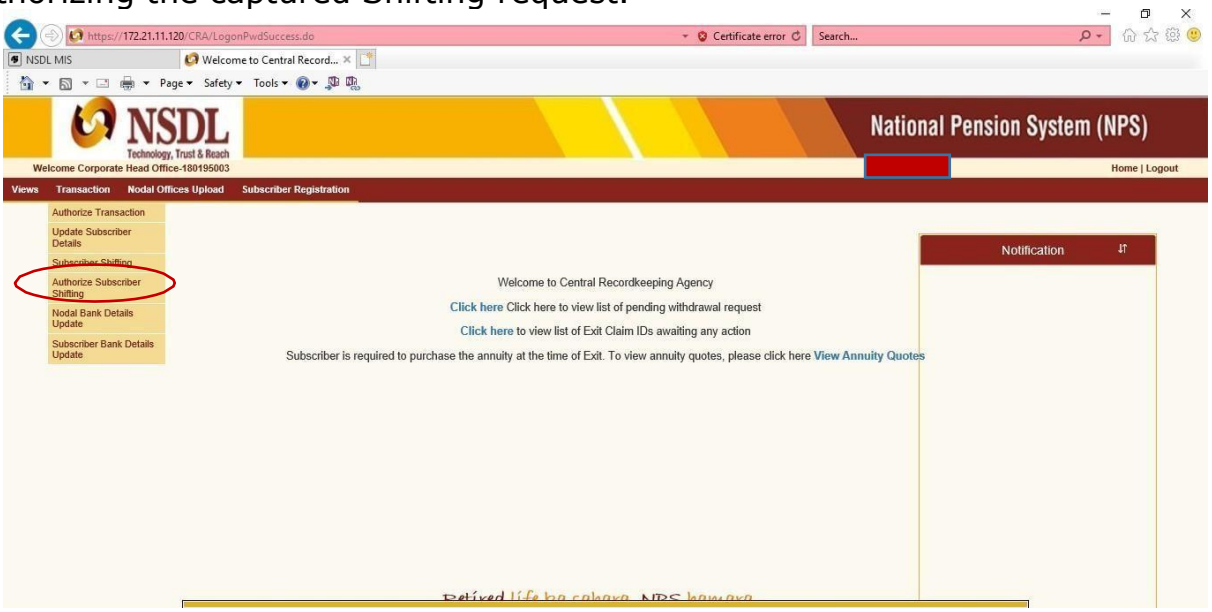
Confirm and generate Acknowledgement Number for the request captured



Authorization of Shifting Request

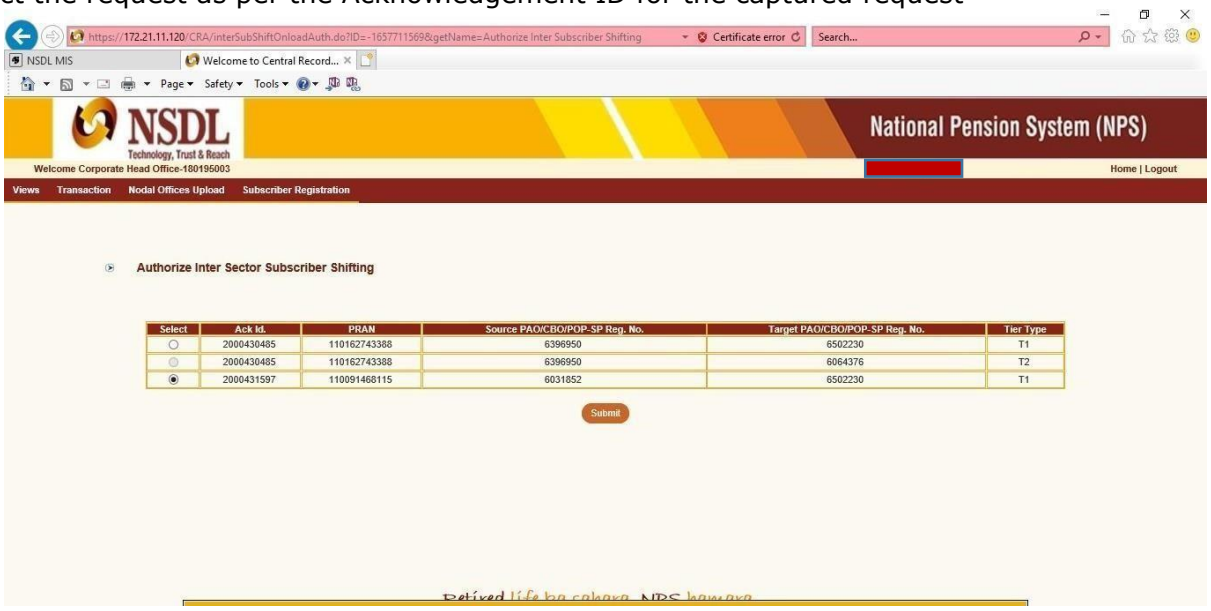
Step 1:

Log in to the CRA system https://cra-nsdl.com/CRA/ using 'USER ID 2' for Authorizing the captured Shifting request.



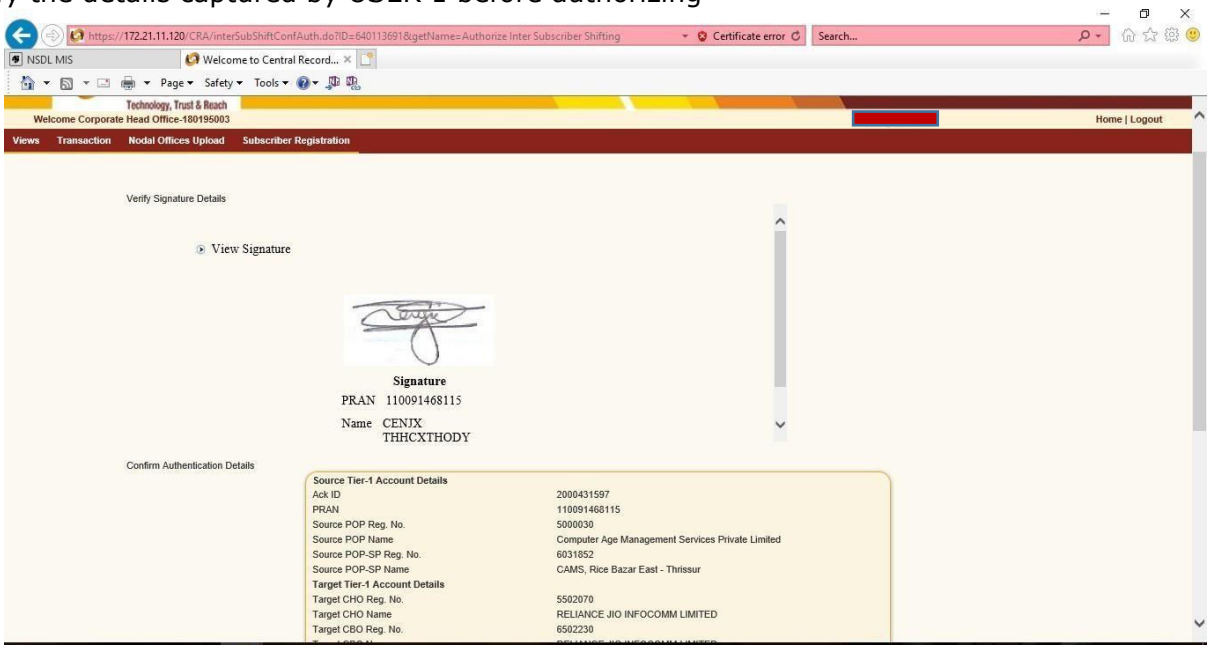
Step 2 :

Select the request as per the Acknowledgement ID for the captured request



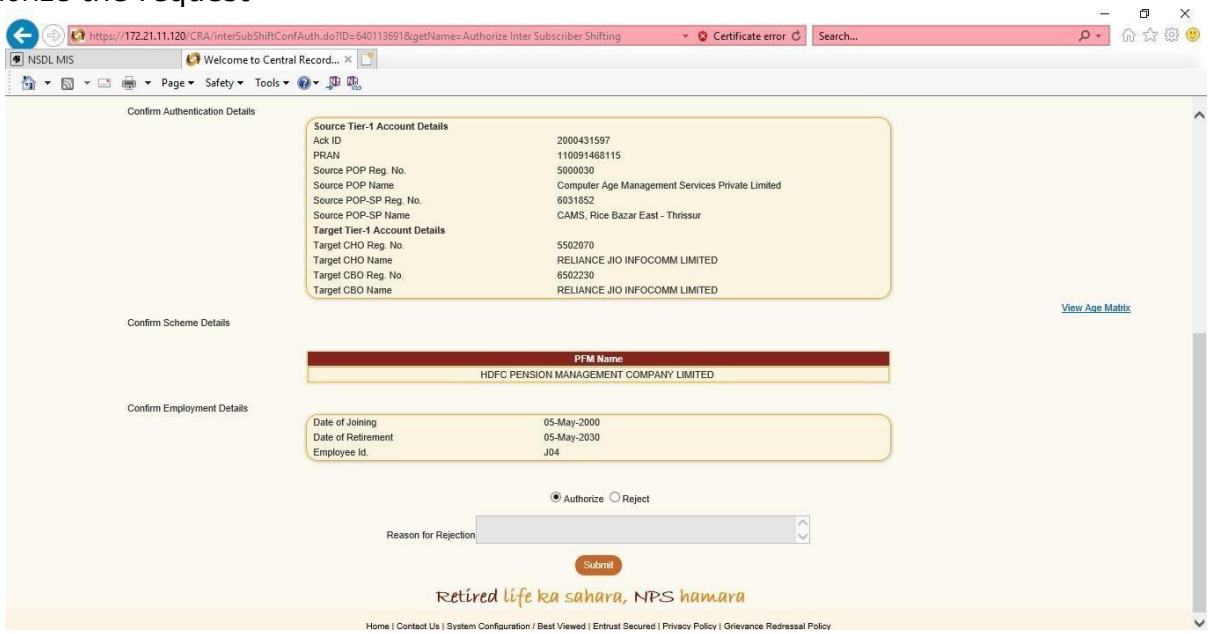
Step 3 :

Verify the details captured by USER 1 before authorizing



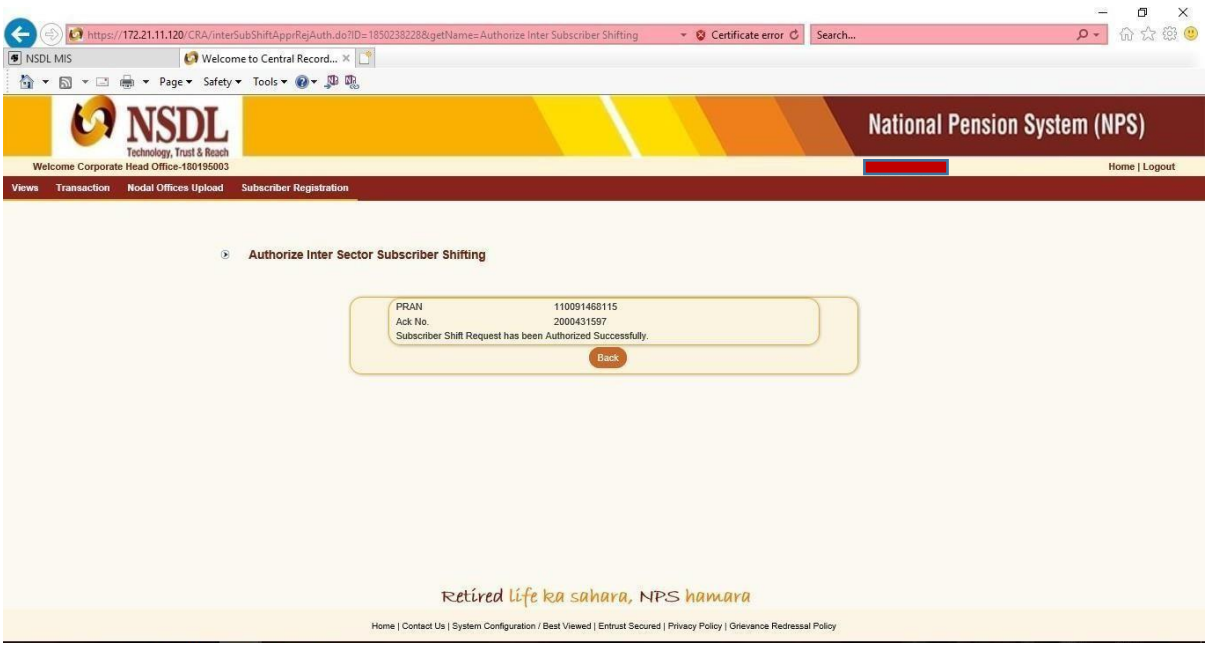
Step 4 :

Authorize the request



Step 5 :

Shifting request complete in the CRA System



C. Corporate Subscriber Detail Modification by Employer

1. Preface

As a part of the development process through the e-NPS online module, the functionality for 'Corporate Subscriber Details modification' has been made available to the corporate nodal officer for making the subscribers details modification for any discrepancies by the Subscriber while registration (employed with the said corporate and having a PRAN under NPS with another entity/sector).

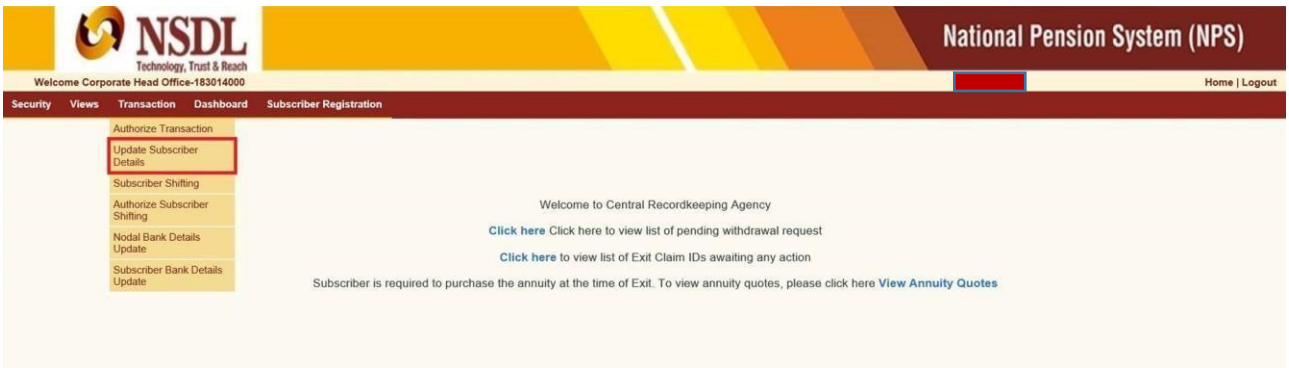
In order to avoid the delay caused due to incorrect information filled in by the corporate subscriber and also to help in handling NPS operations efficiently, we have extended the said functionality to shift the subscribers.

This functionality is available to the corporates registered in CRA System under Corporate Sector for NPS.

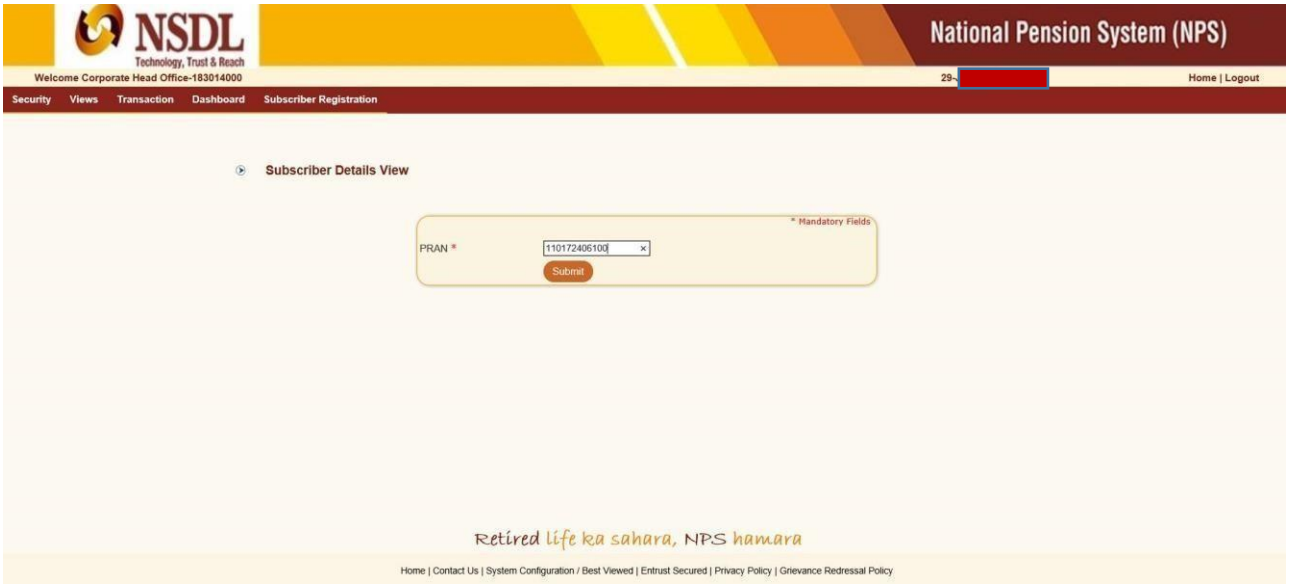
The activity is similar to Inter-Sector Shifting as in here also maker-checker activity needs to be done. In first part the maker will do the necessary steps by selecting "Transaction=>Update Subscriber Details".

Once the details are modified, Nodal officer will login with ID 2 provided to complete the "authorization of the request". Select "Transaction=>Authorize transaction" select the specific request click on Search and confirm the request.

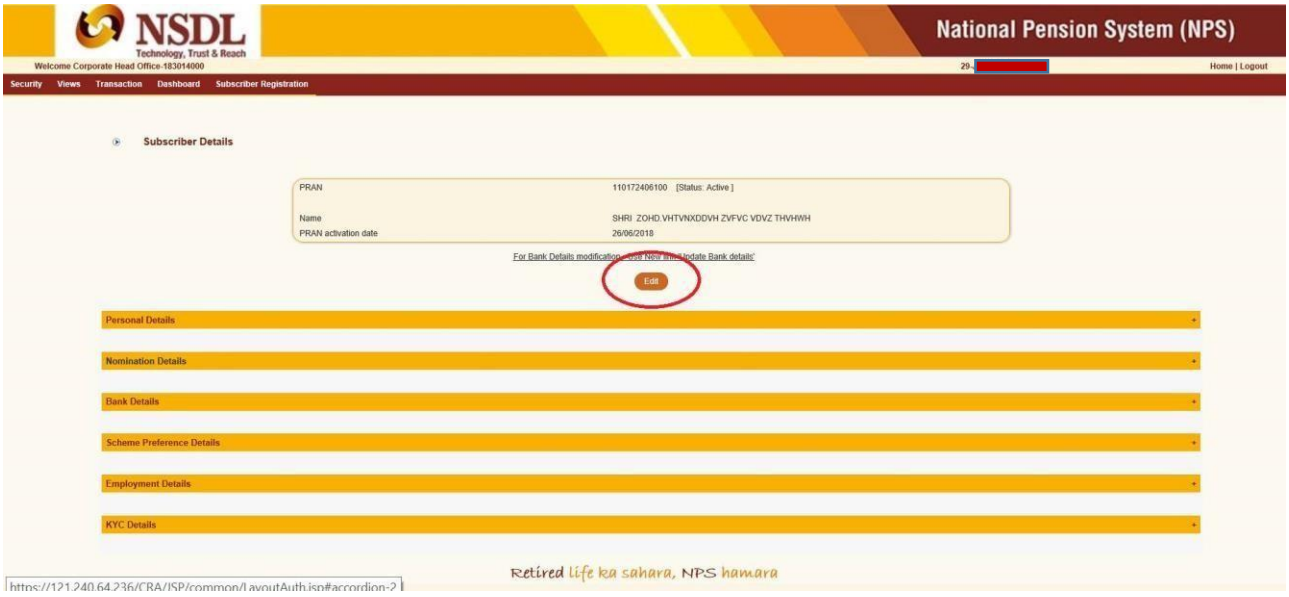
Step 1: Once the nodal officer logs in, click on "Transaction" tab. Then select "Update Subscriber Details"



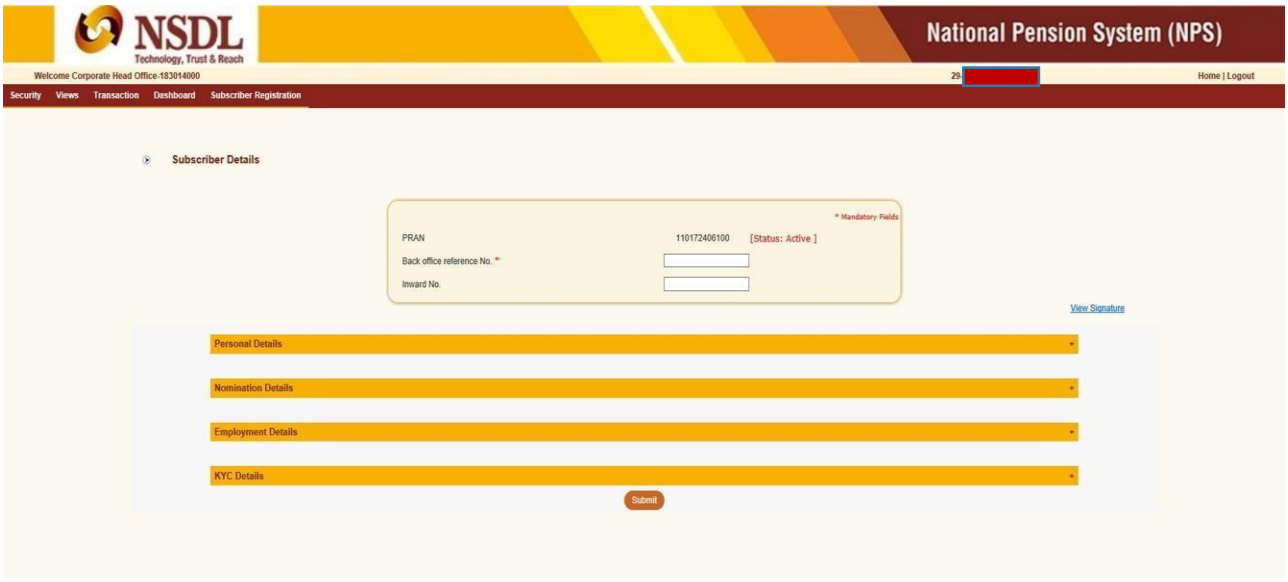
Step 2: Enter the desired PRAN number for modifications



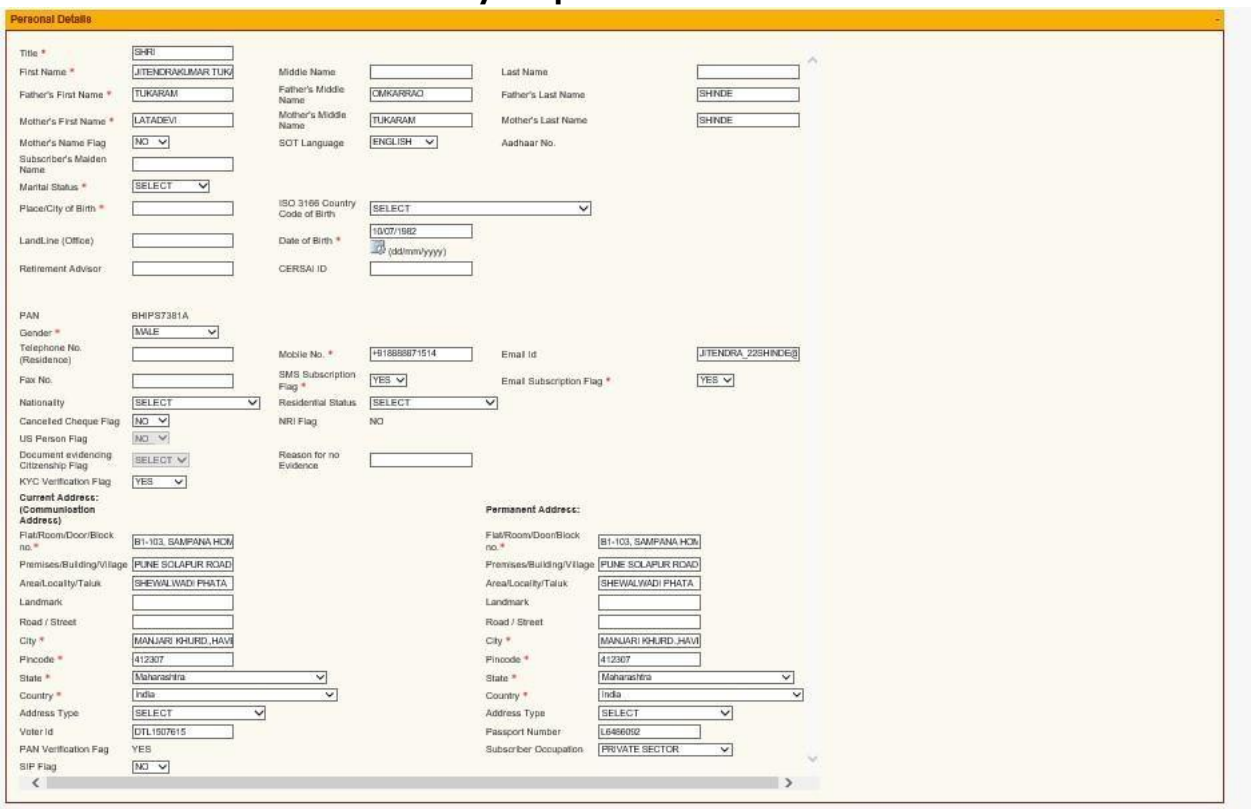
Step 3 : Click on edit option

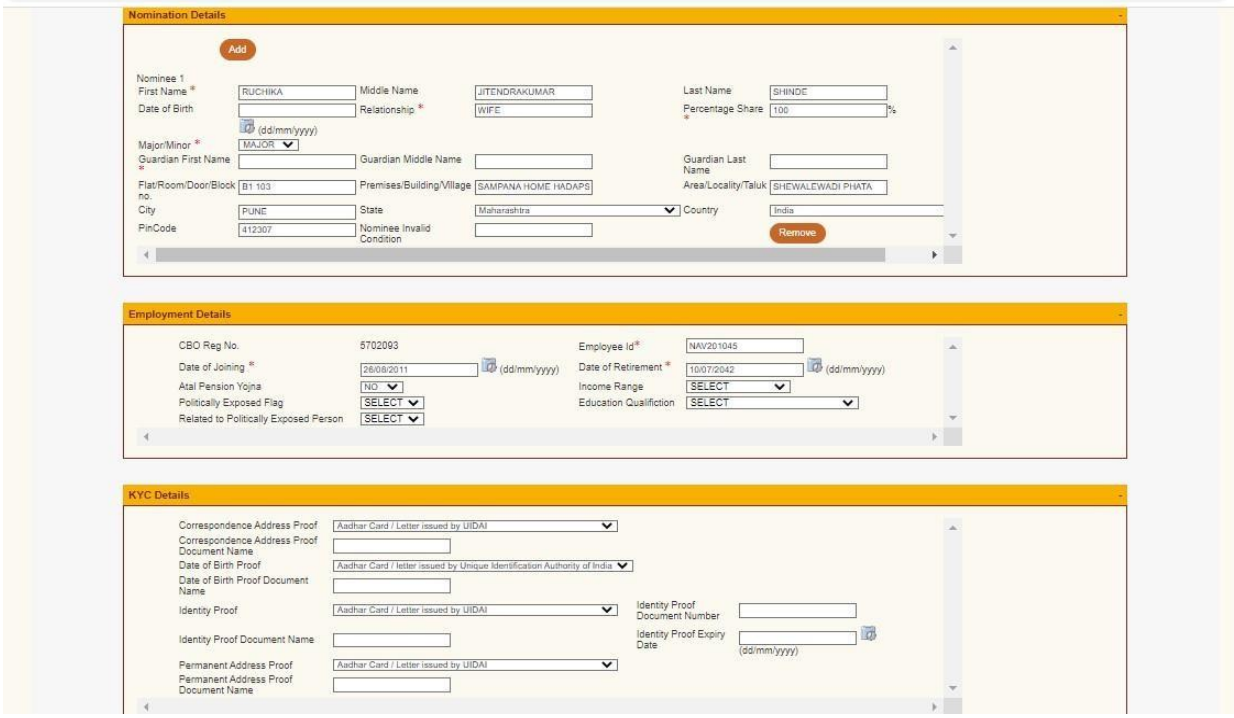


Step 4:

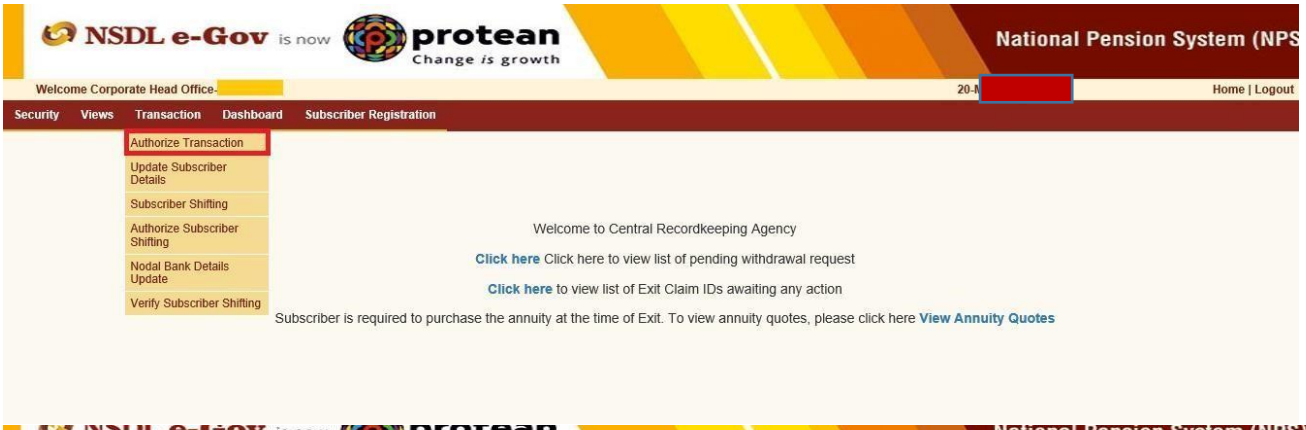

NSDL
Technology, Trust & Reach
National Pension System (NPS)
Welcome Corporate Head Office-183014000
29
Home | Logout
Security
Views
Transaction
Dashboard
Subscriber Registration
Subscriber Details
* Mandatory Fields
PRAN
110172406100
[Status: Active]
Back office reference No. *
Inward No.
View Signature
Personal Details
Nomination Details
Employment Details
KYC Details
Submit

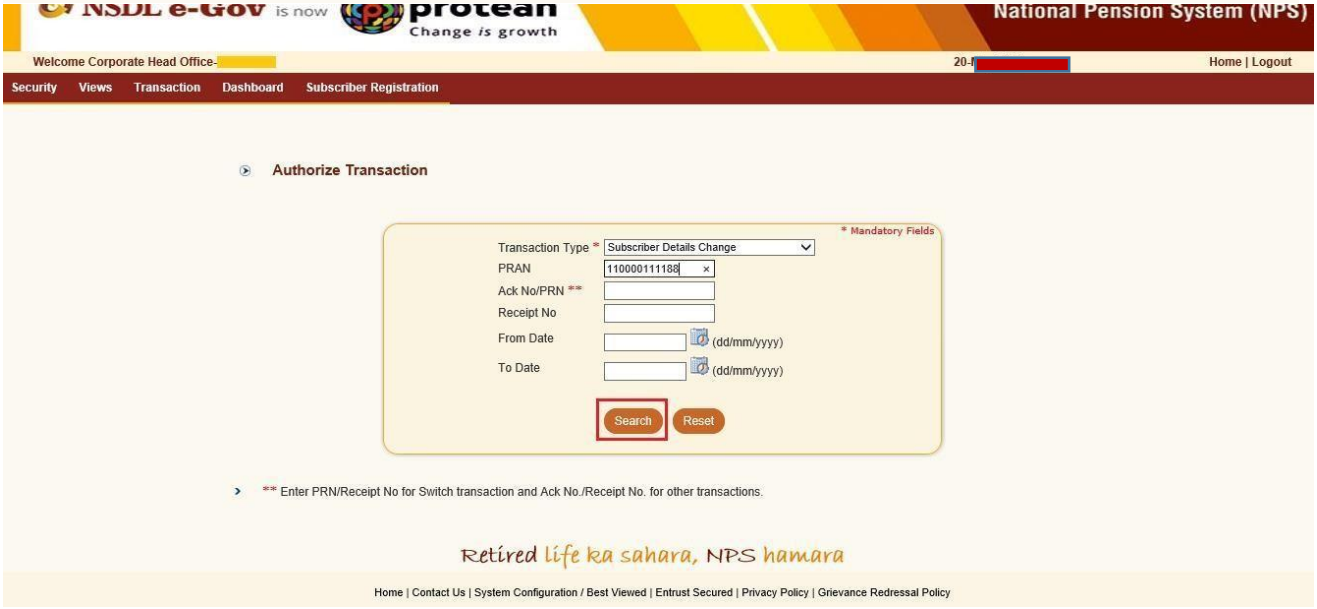
Details which can be modified by Corporate are mentioned below.





After clicking on "Submit" Ack No will generated, the Request has to be authorized by the checker user (USER ID 2) of the corporate using the Ack No or PRAN number as given in the below screenshot:



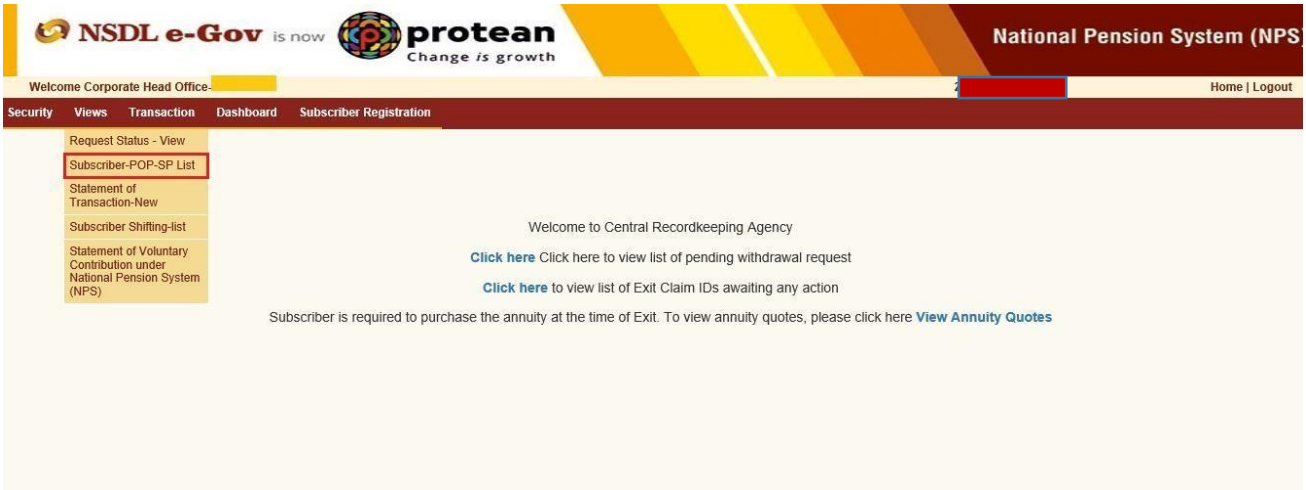


Once the details are modified as per the information received from the Subscriber, the corporate nodal officer verifies the PRAN and the PRAN is active under the mentioned corporate.

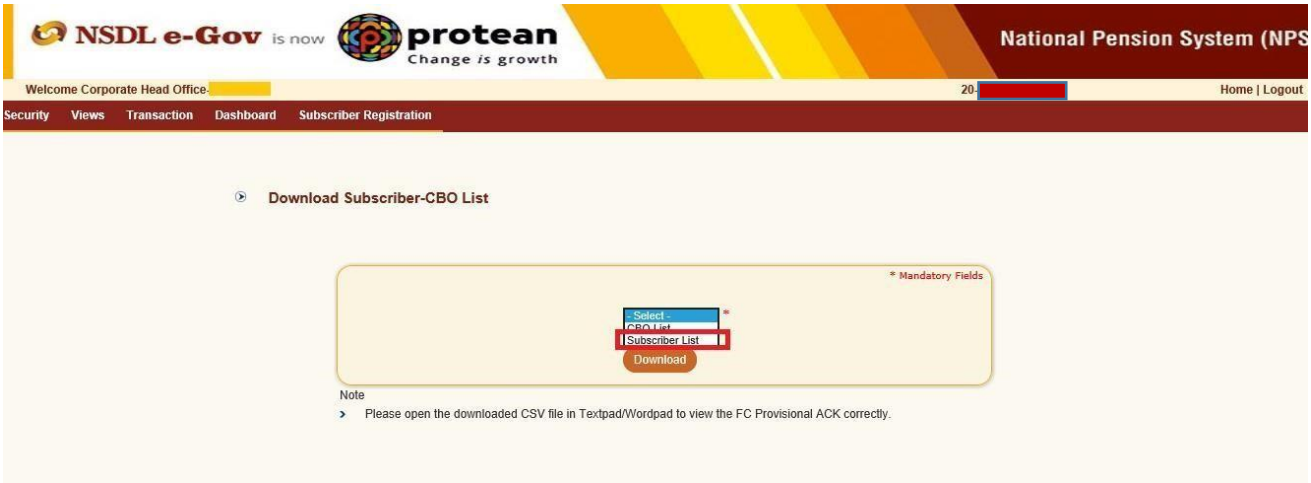
D. Facility for corporates to download the list of associated PRANs

This functionality is available to the corporates registered in CRA System under Corporate Sector for NPS.

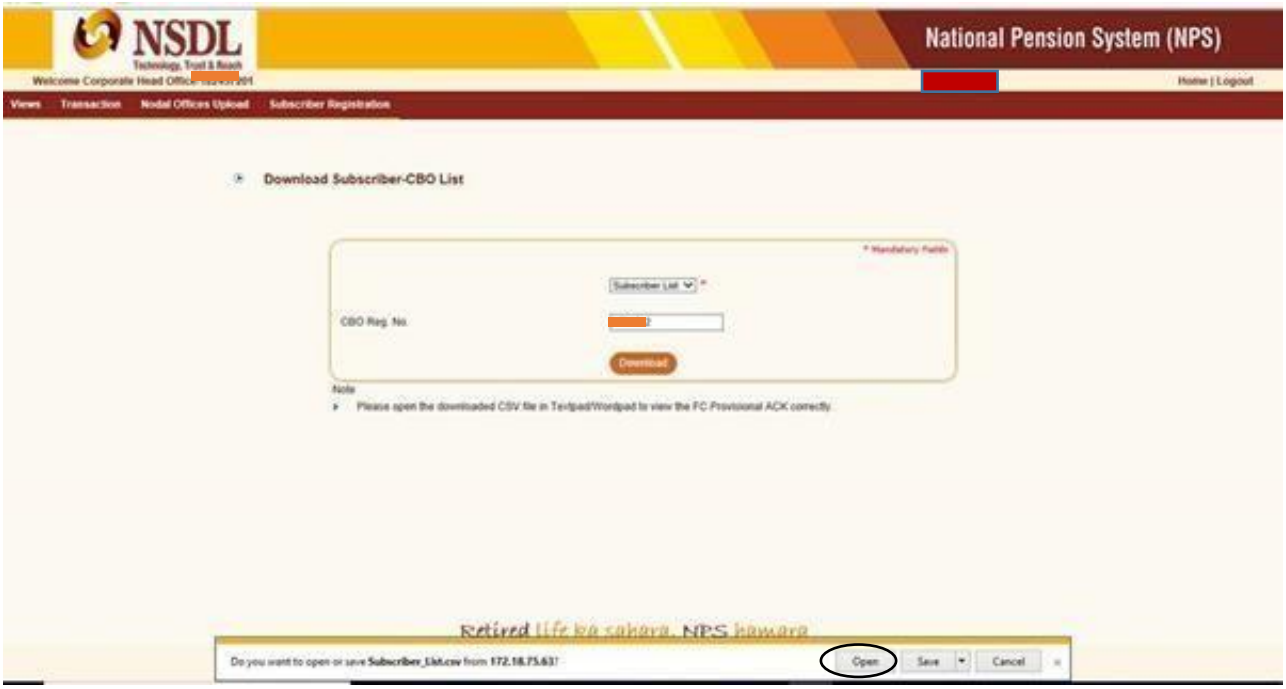
Step 1: Log in to the CRA system https://cra-nsdl.com/CRA/ using 'USER ID' assigned to the
Corporate. Once the nodal officer logs in, click on "Views" tab. Then select "Subscriber POP-SP
List"



Step 2: After clicking on "Subscriber POP-SP List" select "Subscriber List" option in dropdown, as shown in below screen:



Step 3: After selecting the "Subscriber List" the Nodal Officer can click on download option directly to view the Subscriber list.

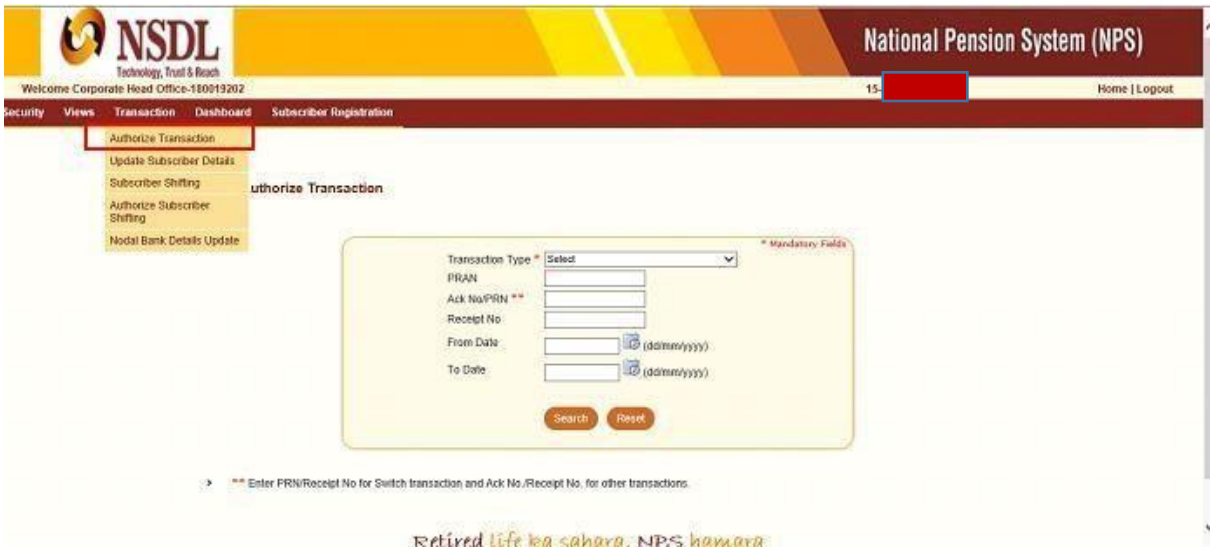


E. Online feature to authorize Nomination details change request in the CRA System

The Corporate subscriber under NPS has been enabled with an online feature to initiate the Nomination details change request in the CRA system. Further, as per the stipulated process the 'Nomination details change request' initiated by the Corporate subscriber has to be actioned upon by in the CRA system by the mapped Corporate office using the login credentials assigned to the users.

Mentioned below are the steps to be followed by the Corporate users to successfully execute the Nomination details change request in the CRA system initiated by the Corporate subscribes:

Step 1: You are required to login to the CRA system (www.cra-nsdl.com) with the password based User IDs assigned to your office. On entering the login credentials, Home screen will be displayed. You are required to click on menu 'Transactions', Sub Menu- 'Authorize Transaction'. The same is shown below screenshot:



Step 2: Further select the 'Transaction Type' - 'Subscriber Details Change'. Provide either the 'PRAN' or 'Acknowledgement number' in the relevant fields and click on 'Search'. The request initiated by the subscriber would appear in a table below showing - 'Acknowledgement number, Receipt Number, Subscriber Name, Date of Request Capture and Link to Details. The same is shown below screenshot:

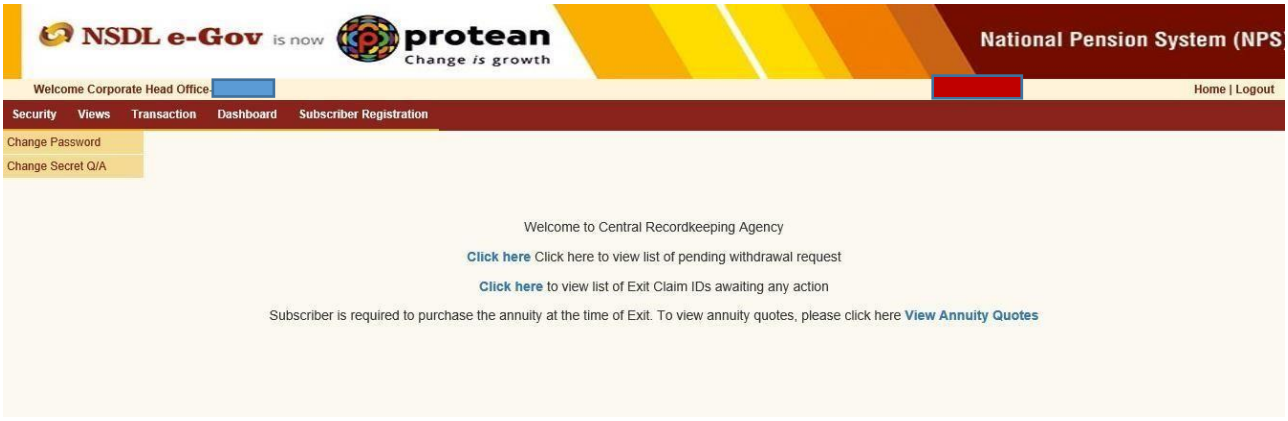
Step 3: Click on 'Link to Details' and Under 'Nomination details', the details changed by the subscriber would appear highlighted in red.
Verify the details and tick Authorize or Reject options accordingly and hit the Submit tab. The same is shown below screenshot:

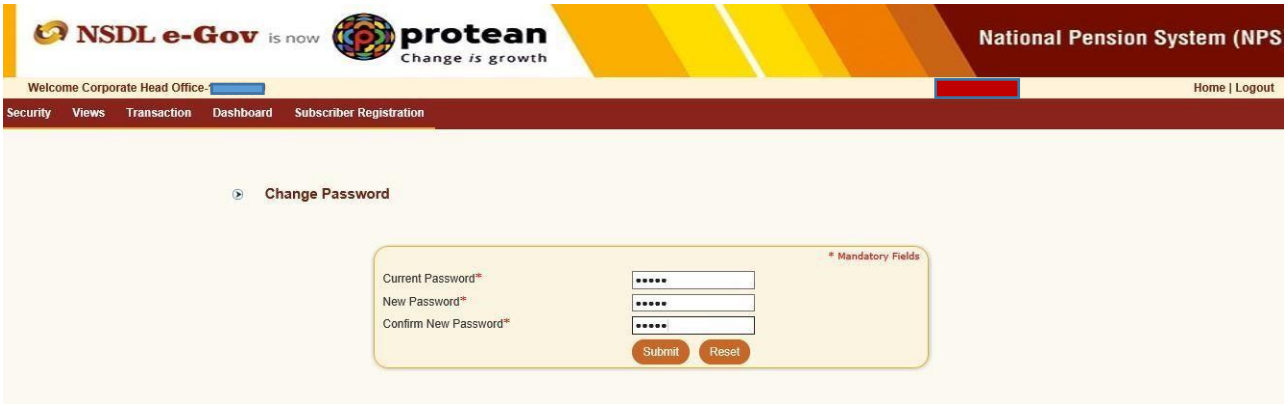
Functionalities/features available to a Corporate

1. Security Option

The User shall have an option to change the password through the "Security Option" available in CRA login https://cra-nsdl.com/CRA/. The password can be changed by selecting Change Password option in the dropdown. The user is also having an option to change/set the secret Q/A.

As a safety measure to prevent unauthorized access, the account will be locked if the user enters incorrect password for five consecutive attempts. The user shall have an option to reset the password by answering the secret question even after the account is locked. The options to change the password and secret Q/A is shown in below screenshot:

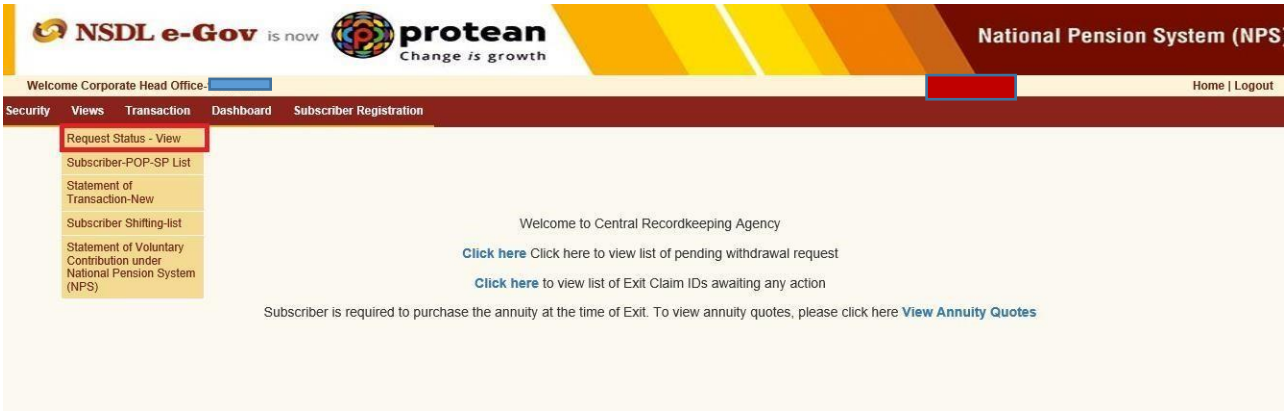




2. Views

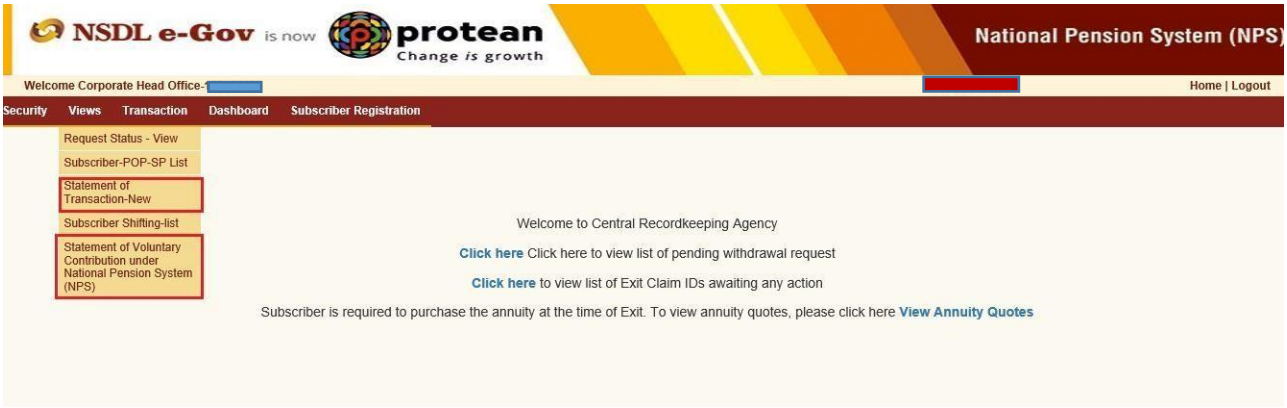
a) Request Status- View

Under View option sub option "Request Status View" the user shall view the status of request such as Subscriber details change, Subscriber shift request etc. as shown in below screenshot:



b) Statement of Transaction and Statement of Voluntary Contribution under National Pension System view

The Nodal Officers have an option to view the statement of transaction of associated Subscribers (Select option > Views > Statement of Transaction).
The User can also view the Statement of Voluntary Contribution under National Pension System
(Select option > Views > Statement of Voluntary Contribution under National Pension System (NPS))



3. Dashboard

a) ERM Dashboard Report- Incase of any error/rectification made in contribution by the office/POP of the corporate, the same can be viewed under this report (Select option > Dashboard > ERM Dashboard Report). The details will appear in the respective month of the processed ERM cases.

Two-Factor Aadhaar-Based Authentication for Corporate Users

We would like to inform that Aadhar based authentication functionality has a Top to Down approach. It means, the Corporate Head Office (CHO) must complete the Aadhaar linking process before their mapped Corporate Branch Offices (CBOs). CHO Aadhaar linking requests will be authorized by CRA. After successful Aadhaar linking by the CHOs, their mapped CBOs would initiate the Aadhaar linking process which will be authorized by their respective CHO

Please note CHO Aadhaar linking requests will be authorized by CRA and thereafter the Corporate Head Office (CHO) is responsible for authorizing the Aadhaar linking requests for CBO Users.

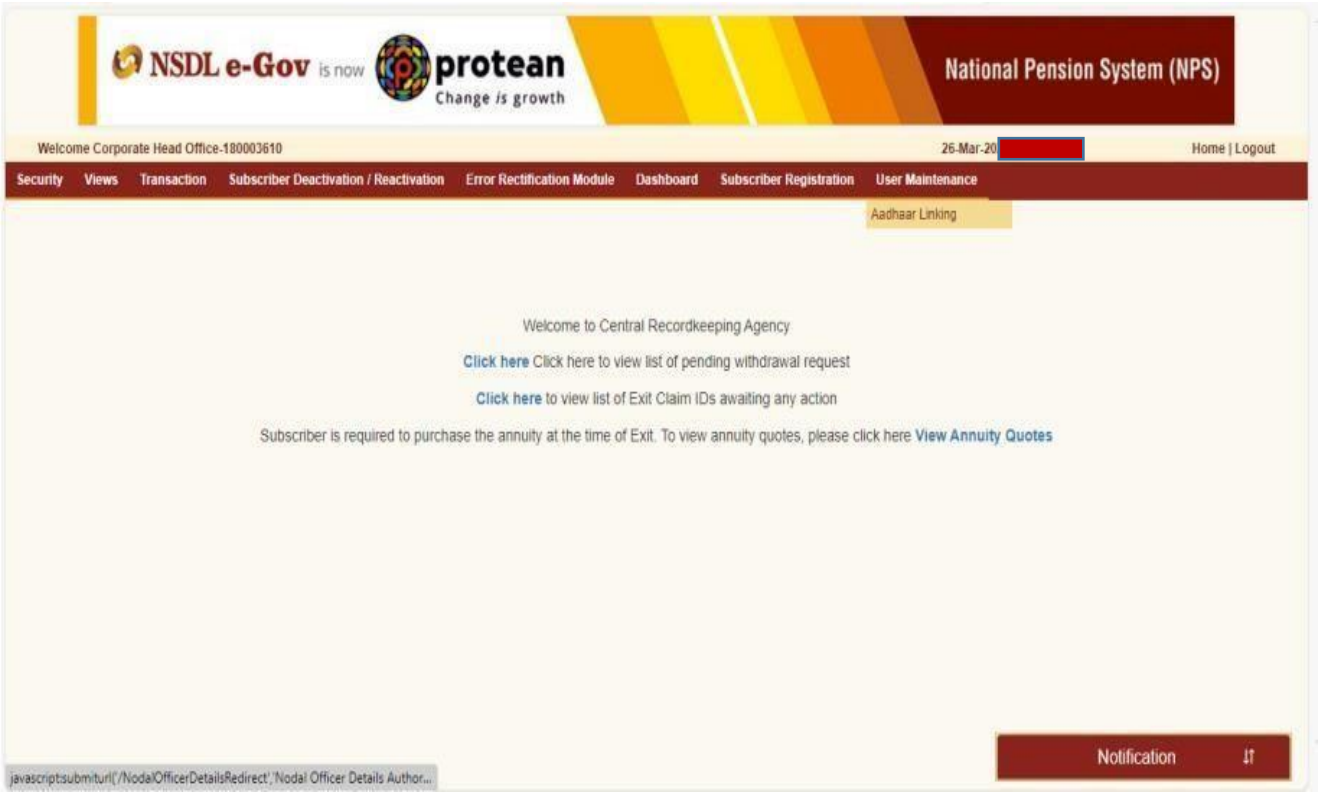
Kindly note below very critical points.

1. Same Aadhaar can't be mapped with multiple user id.

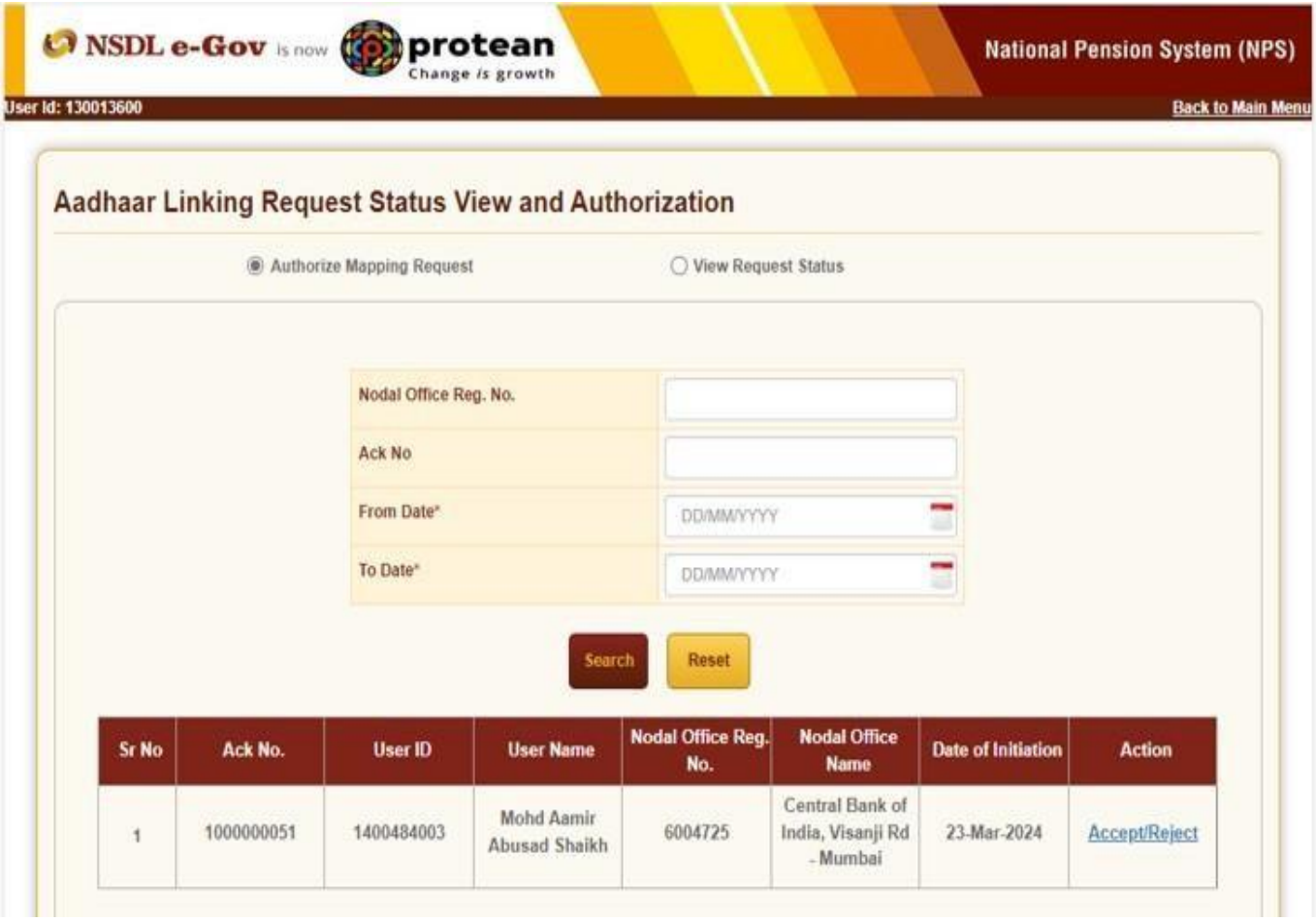
2. In one User Id maximum five Aadhaar can be mapped.

Authentication of Aadhaar linking Requests submitted by CBOs

CHO Home Page



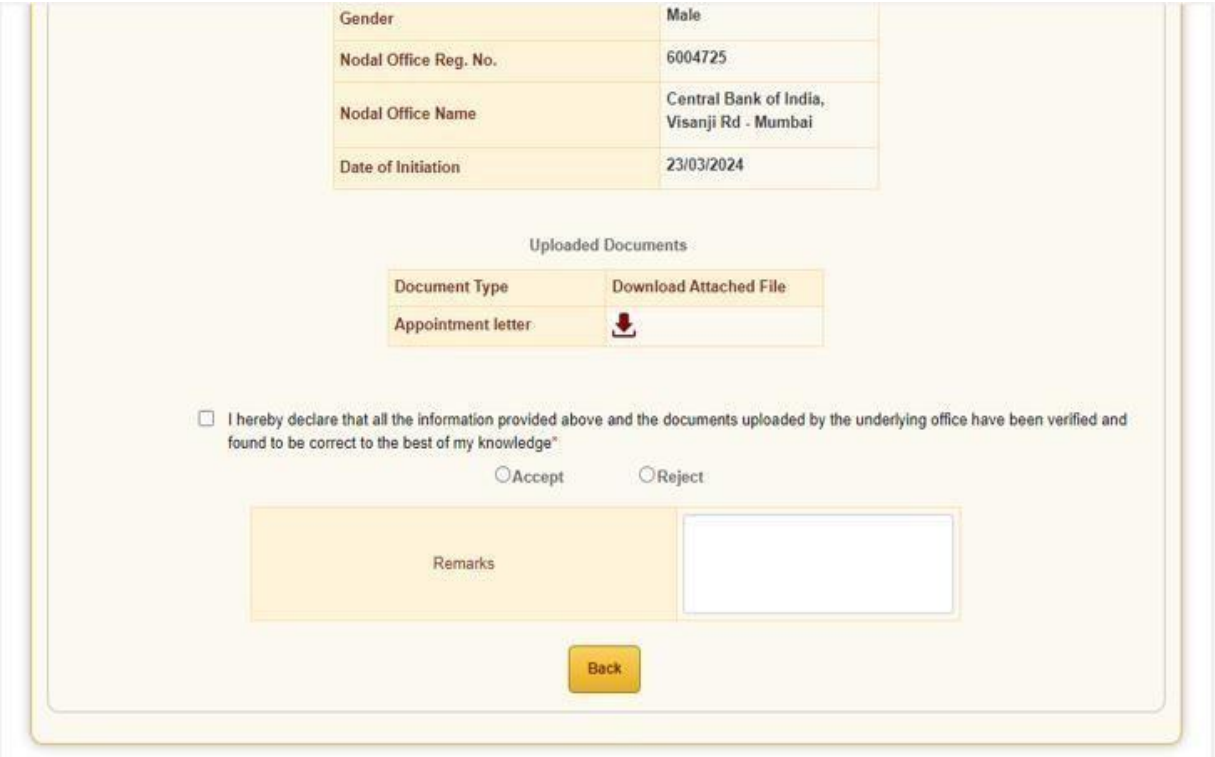
Under the Radio Button Option of “Authorize Mapping Request” the User may search details by Nodal Office Reg. No. or Ack No. or From Date and To Date Option to get details for Authorization.



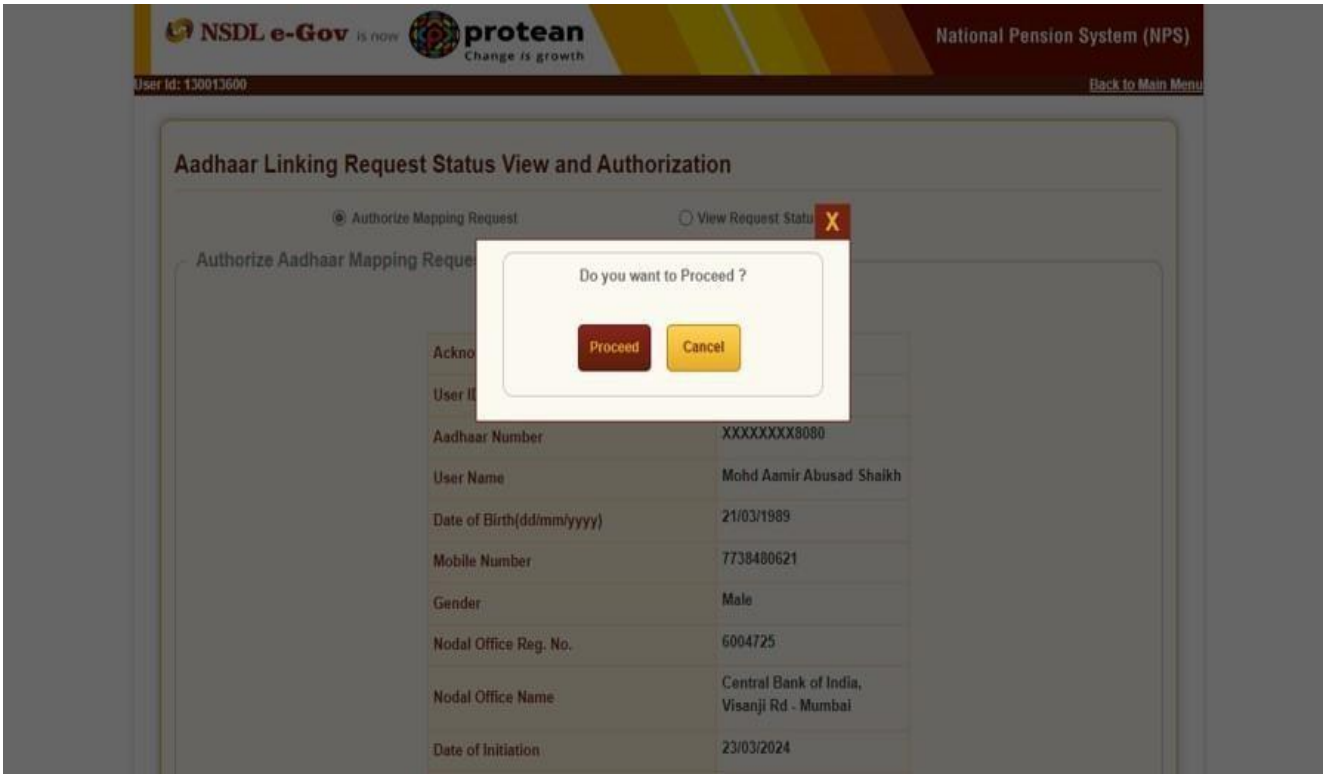
The CHO user will verify the documents uploaded by the CBO users before authorizing Aadhaar linking request by clicking on “Download Attached File” option.

The CHO authorizer has to tick the declaration and can Accept or Reject with

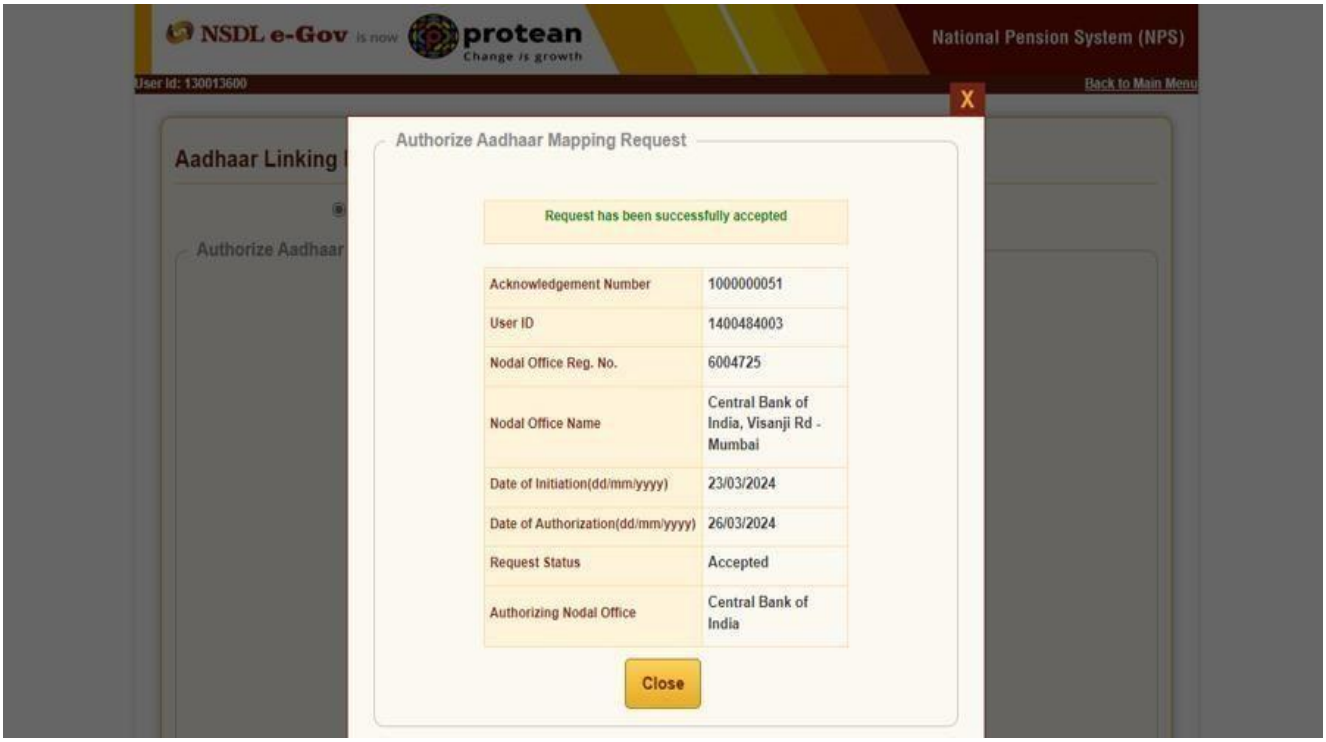
Remarks and Click on “Approve” and “Proceed”. On rejection, appropriate comment has to be provided.



The CHO user may click on “Proceed” Option to go ahead.



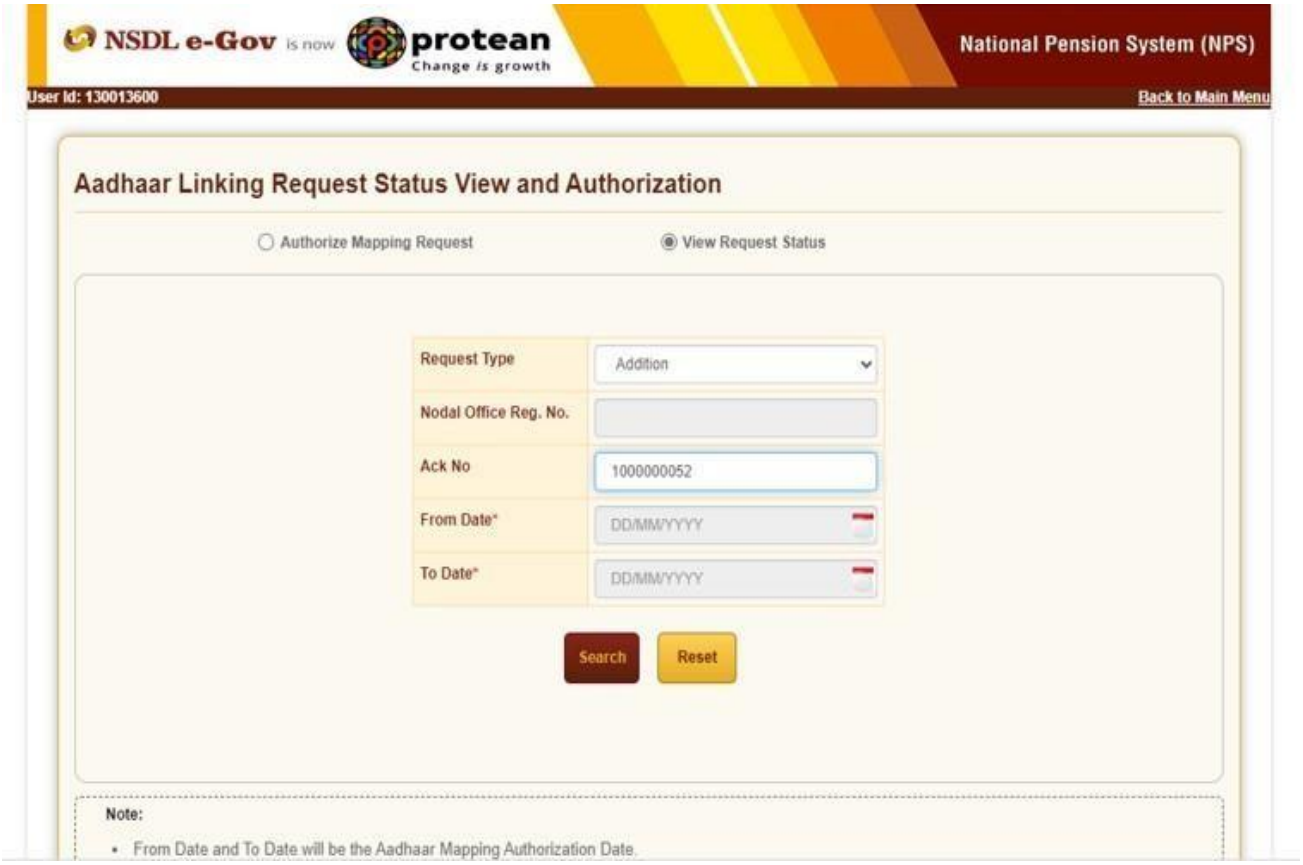
The system will display “Request has been successfully accepted” and please click on “Close” option to complete.

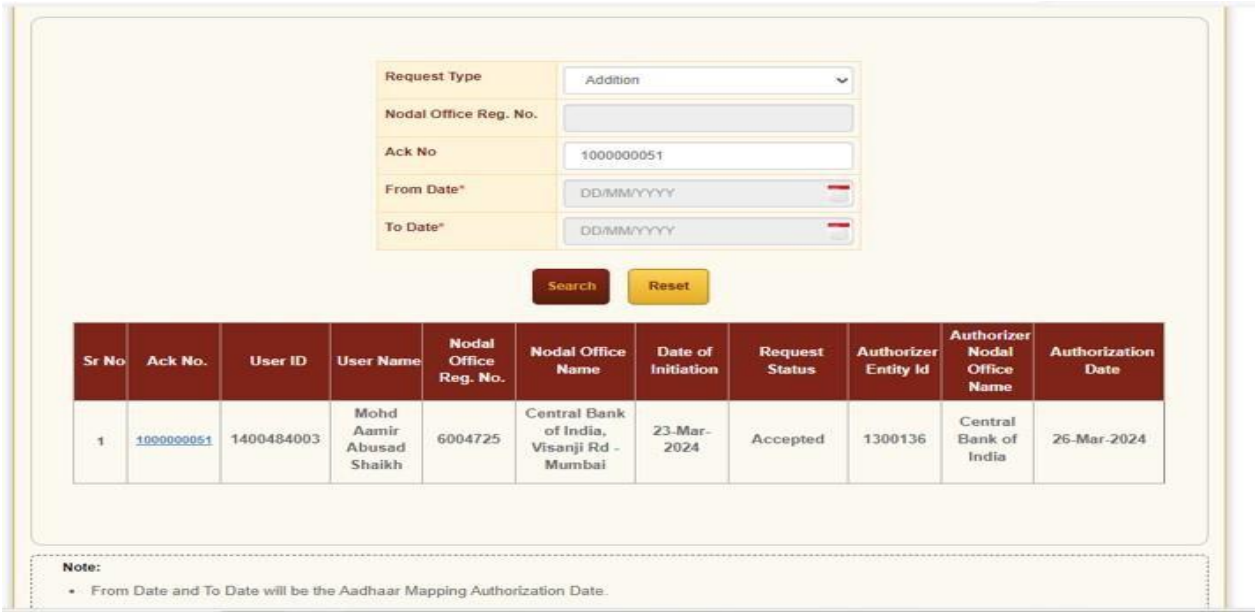


Status View for Aadhar Linking

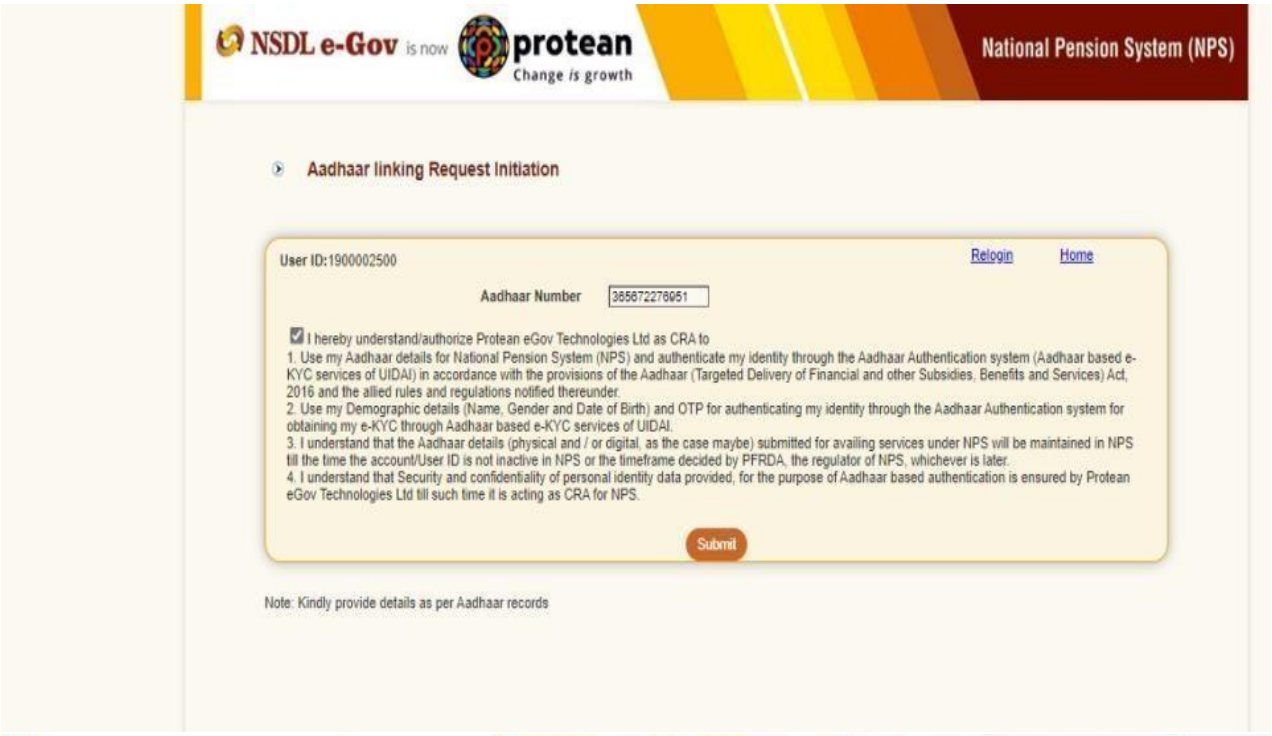
The users can view the status of request created by logging-in to the CRA system and providing Acknowledgement ID under User Maintenance section by clicking on Radio Button “View Request

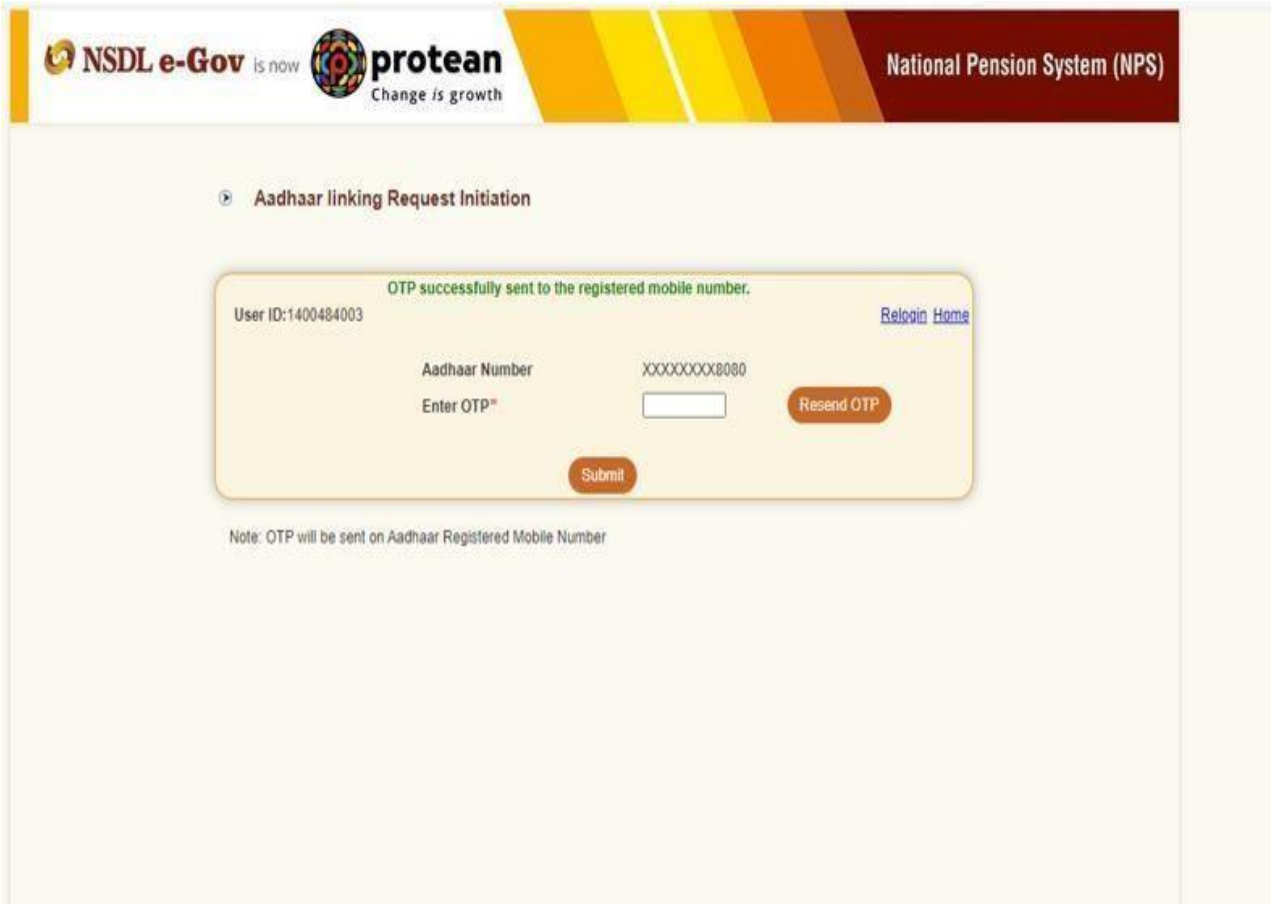
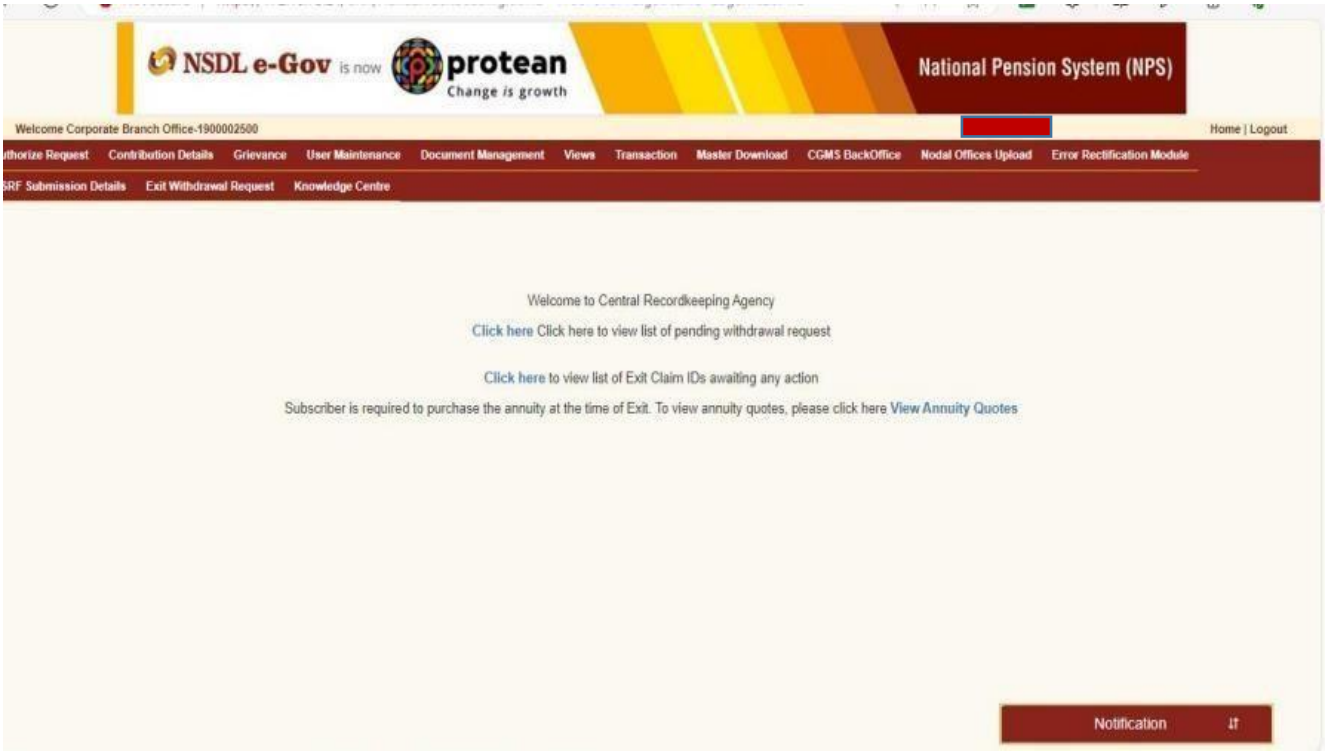
Status”





CBO Login post Aadhaar authentication by CHO authorizer**.**


NSDL e-Gov is now protean
Change is growth
National Pension System (NPS)
Aadhaar linking Request Initiation
User ID:1900002500
Relogin
Home
Aadhaar Number
365672276951
I hereby understand/authorize Protean eGov Technologies Ltd as CRA to
1. Use my Aadhaar details for National Pension System (NPS) and authenticate my identity through the Aadhaar Authentication system (Aadhaar based e-KYC services of UIDAI) in accordance with the provisions of the Aadhaar (Targeted Delivery of Financial and other Subsidies, Benefits and Services) Act, 2016 and the allied rules and regulations notified thereunder.
2. Use my Demographic details (Name, Gender and Date of Birth) and OTP for authenticating my identity through the Aadhaar Authentication system for obtaining my e-KYC through Aadhaar based e-KYC services of UIDAI.
3. I understand that the Aadhaar details (physical and / or digital, as the case maybe) submitted for availing services under NPS will be maintained in NPS till the time the account/User ID is not inactive in NPS or the timeframe decided by PFRDA, the regulator of NPS, whichever is later.
4. I understand that Security and confidentiality of personal identity data provided, for the purpose of Aadhaar based authentication is ensured by Protean eGov Technologies Ltd till such time it is acting as CRA for NPS.
Submit
Note: Kindly provide details as per Aadhaar records


NSDL e-Gov is now protean
Change is growth
National Pension System (NPS)
Aadhaar linking Request Initiation
OTP successfully sent to the registered mobile number.
User ID:1400484003
Relogin Home
Aadhaar Number
XXXXXXXX8080
Enter OTP*
Resend OTP
Submit
Note: OTP will be sent on Aadhaar Registered Mobile Number

CBO Home Page