

Protean eGov Technologies Limited



Standard Operating Procedures

For

Subscriber Details Modification by POP

Version 1.2

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REVISION HISTORY

Sr. No.	Date of Revision	Ver	Section Number	Description of Change
1		1.0	-	Initial Version
2	23/08/2024	1.1	-	Subscriber Details Modification Request for Name, DOB and DOR
3	02/04/2025	1.2	-	Subscriber Name & DOB updation with reference to mode of registration and incorporated list of documents.

Procedure for updating subscriber details of Subscribers

Modification is a two-step process:

- A. Capturing of Master details of Subscribers in CRA system by mapped POP.
- B. Authorization of the request in CRA system by mapped POP checker.

A. Capturing of Master Details of Subscribers in CRA system by mapped POP.

From the available menus, POP user will have to click on 'Transaction' menu and further click on 'Subscriber Personal Details Update'

The screenshot displays the CRA system interface. The top navigation bar includes links for Transaction, Authorize Request, Contribution Details, Subscriber Registration, Grievance, Document Management, User Maintenance, Views, MIS, Reports, Dashboard, and Subscriber Deactivation / Reactivation. A left sidebar menu lists various options, with 'Subscriber Personal Details Update' highlighted. The main content area shows the 'Status of Maintenance Request' form. This form includes fields for Transaction Type (a dropdown menu), PRAN (a text input field), Ack No./PRN/Receipt No. (a text input field), Capture From Date (a date picker set to 10/09/2024), and Capture To Date (a date picker set to 10/09/2024). There are 'Search' and 'Reset' buttons below these fields. A note below the form states: 'Please enter the Ack No. or PRN/Receipt number provided by the Nodal Office/POP/SP at the time of submission of the Maintenance request.' The footer of the page includes the text 'Retired Life ka sahara, NPS HAMARA' and a navigation bar with links: Home, Contact Us, System Configuration, Best Viewed, Entrust Secured, Privacy Policy, Grievance Redressal Policy, and a JavaScript redirect link.

The next screen will further display four options: **Initiate, Verify, Authorize & View Request Status** for the purpose of carrying out modification/ update of Subscriber details, POP user will have to select the first option i.e. "Initiate" where POP will have to provide the Permanent Retirement Account Number (PRAN) and accordingly existing details will be auto fetched. Further, click on Edit button to proceed with modification.

The screenshot shows the 'Personal Details Update' form. At the top, there are four radio buttons: 'Initiate' (selected), 'Verify', 'Authorize', and 'View Request Status'. Below these is a section titled 'Update Personal Details'. Inside this section, there is a label 'Permanent Retirement Account Number (PRAN)*' and a text input field containing the value '110031127012'. At the bottom of the form, there are two buttons: 'Submit' and 'Cancel'.

As shown in Figure, all the fields will become editable. The POP user shall edit the old details and enter the new details as per the change request submitted by subscriber.

Personal Details Update

☒ Initiate
 ☐ Verify
 ☐ Authorize
 ☐ View Request Status

Existing Personal Details

PRAN	110031127012
Subscriber's Name	RAVIKIRAN MANOHARABU SUDDAIPALLI
Date Of Birth	20/01/1986

Note

- All dates are in dd/mm/yyyy format

(For UOS Subscriber)

☒ Initiate
 ☐ Verify
 ☐ Authorize
 ☐ View Request Status

Existing Personal Details

PRAN	110134678041
Subscriber's Name	THVDHNNH THNGH
Date Of Birth	21/05/1992
Date Of Retirement	31/05/2050

(For Corporate Subscriber)

After entering the subscriber name change in CRA system, POP has to select **Reason for Change for name modification** and upload the supporting valid documents under '**Proof Document type and Upload Document**' for name change. Please note that it is the responsibility of POP to check the veracity of the supporting documents uploaded.

PRAN: 110031127012 Subscriber Name: RAVIKIRAN MANOHARBABU SUDDAPALLI

Change Type	Existing Value	New Value	Reason for Change	Document Type	Upload Document
Subscriber's Name	RAVIKIRAN MANOHARBABU SUDDAPALLI	RAVIKIRAN MANOHARBABU SUDDAPALLI	NAME CHANGE	Self-attested passport copy	Choose File No file chosen
				Self-attested POI in old name	Choose File No file chosen
				Self-attested POI in new name	Choose File No file chosen
				Extract of service records with new name	Choose File No file chosen
				Proof of bank account with new name	Choose File No file chosen
				52 Form	Choose File No file chosen

Note: Document should be in ".jpg", ".png", or ".pdf" format and size of document should be between 2KB to 2MB

(Above screen for name modification)

PRAN: 110031127012 Subscriber Name: RAVIKIRAN MANOHARBABU SUDDAPALLI

Change Type	Existing Value	New Value	Reason for Change	Document Type	Upload Document
Date Of Birth	20/01/1986	23/01/1986	-SELECT-	-SELECT-	Choose File No file chosen

Note: Document should be in ".jpg", ".png", or ".pdf" format and size of document should be between 2KB to 2MB

I hereby certify/confirm that Subscriber is an existing KYC verified customer. The given details are correct and true.

Physical PRAN Card Required? NO

Note:

- 1) Revised ePRAN Card can be downloaded after authorization from subscriber login.
- 2) Reprint of PRAN Card through this mode is a billable transaction and units pertaining to the charges will be redeemed from your PRAN. For details of charges, please visit <https://www.ipracn.co.in>

(Above screen for DOB modification)

PRAN: 190134678041 Subscriber Name: THIVDHNH THNGH

Change Type	Existing Value	New Value	Reason for Change	Document Type	Upload Document
<input type="radio"/> Subscriber's Name	THIVDHNH THNGH	<input type="text" value="THIVDHNH"/> <input type="text" value="THNGH"/> <input type="text" value="THNGH"/>	--SELECT--		
<input type="radio"/> Date Of Birth	25/05/1992	25/05/1992	--SELECT--		<input type="button" value="Choose File"/> No file chosen
<input checked="" type="radio"/> Date Of Retirement	31/05/2058	31/05/2058	--SELECT--		<input type="button" value="Choose File"/> No file chosen

Note: Document should be in ".jpg", ".png", or ".pdf" format and size of document should be between 2KB to 5MB.

☐ It is certified that Subscriber is employed with Nodal Office/Corporate and the details 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.

(Screen for DOR modification)

☐ Subscriber's Name: RAVIKIRAN MANOHARABABU SUDDAPALLI

Change Type	Existing Value	New Value	Document Type	Upload Document
<input checked="" type="radio"/> Date Of Birth	26/01/1986	23/01/1986	--SELECT--	<input type="button" value="Choose File"/> No file chosen

Note: Document should be in ".jpg", ".png", or ".pdf" format and size of document should be between 2KB to 5MB.

☒ I hereby certify/confirm that Subscriber is an existing KYC-verified customer. The given details and the documents are verified by this office.

Physical PRAN Card Required?

Note:

- 1) Revised ePRAN Card can be done.
- 2) Rx print of PRAN Card through this mode is a billable transaction and units pertaining to the charges will be redeemed from your PRAN. For details of charges, please visit <https://www.npsra-nodi.co.in>

Note:

- All dates are in dd/mm/yyyy format
- Document upload is mandatory for updated field
- Date of Birth, Date of Joining and Date of Retirement documents should be in ".jpg", ".png", or ".pdf" format. Size of document should be between 2

Once the documents are successfully uploaded, the POP has to click on declaration box along with physical PRAN card reprint for UOS PRAN & click on 'Submit' button'.

The screenshot shows a web form for updating subscriber details. At the top, the subscriber's name is displayed as 'RAVIKIRAN MANOHARBABU U SUDAPALLI'. Below this, there are input fields for 'Date Of Birth' (29/01/1986) and 'New Value' (23/01/1986). A table with columns 'Change Type', 'Existing Value', 'New Value', 'Document Type', and 'Upload Document' is present. A note states: 'Note: Documents should be in *.jpg, *.png or *.pdf format and size of document should be between 2KB to 5MB'. A checkbox is checked with the text: 'I hereby certify/confirm that Subscriber is an existing KYC verified customer. The given details and the documents are verified by this office'. Below this, a dropdown menu for 'Physical PRAN Card Required?' is set to 'NO'. A note at the bottom states: 'Note: 1) Reused ePRAN Card can be done 2) Re-print of PRAN Card through this mode is a billable transaction and units pertaining to the charges will be redeemed from your PRAN. For details of charges, please visit <https://www.npsra-nodi.co.in>'. At the bottom right, there are 'Submit' and 'Cancel' buttons. A final note at the very bottom states: 'Note: All dates are in dd/mm/yyyy format. Document upload is mandatory for updated field. Date of Birth, Date of Joining and Date of Retirement documents should be in *.jpg, *.png or *.pdf format. Size of document should be between 2KB to 5MB'.

Clicking on submit button, system will take to other page where POP has to click on confirm button.

The screenshot shows a confirmation page titled 'Personal Details Update'. It has four tabs: 'Initiate' (selected), 'Verify', 'Authorize', and 'View Request Status'. Below the tabs, the 'New Personal Details' section shows: 'PRAN : 110631127012', 'Subscriber Name : RAVIKIRAN MANOHARBABU SUDAPALLI', 'Date Of Birth : 29/01/1986', 'Date Of Joining : 31/12/9999', and 'Date Of Retirement : 31/12/9999'. A table with columns 'Change Type', 'Existing Details', 'New Details', and 'Uploaded Document' is shown. A note states: 'Note: I hereby certify/confirm that Subscriber is an existing KYC verified customer. The given details and the documents are verified by this office'. At the bottom right, there are 'Confirm' and 'Cancel' buttons. A final note at the very bottom states: 'Note: All dates are in dd/mm/yyyy format. Document upload is mandatory for updated field'.

On clicking confirm button, system will generate an acknowledgement number. POP can save the acknowledgement number for future reference and for authorization of the request.

The screenshot displays the NSDL e-Gov National Pension System (NPS) portal. A central confirmation dialog box is overlaid on the main interface. The dialog box has a title bar that reads "Request has been successfully initiated." Below the title bar, there are two sections: "Request Raised For" and "Maker Details".

Request Raised For	
PRAN	110031127012
Subscriber Name	RAVikiran Manoharbabu Suddapalli

Maker Details	
Acknowledgement Number	00409262418051507
Status	Initiated By Nodal Entity
Date of Initiation	04-09-2024
Initiated By - Reg. No	5000085
Initiated By - Name	UTI Asset Management Company Limited

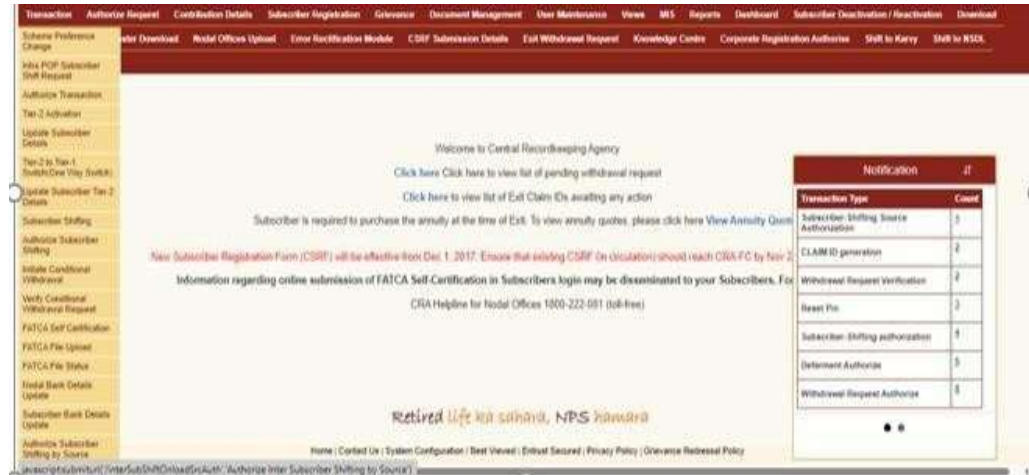
At the bottom of the dialog box, there is a red "OK" button. The background of the portal shows a sidebar with options like "New Person", "PRAN: 11003", "Date Of Birth", "Change Ty", "Date Of B", and "View Details". The main content area is partially visible, showing "Personal I" and "Back to Main Menu".

The following modifications can also be initiated and processed under subscriber log in through OTP or e- Sign option.

1. Change contact details.
2. Modify/Verify Bank Details.
3. Change address.
4. Update Nomination.
5. Permanent Account Number (PAN).
6. Update Photo and Signature.
7. Aadhaar Number.

B. Authorization of the request in CRA system by mapped POP checker.

For authorization of the request, the POP checker will have to login into the CRA system with the second User ID, click on 'Transaction' menu and further click on 'Subscriber Personal Details Update'



On the next screen, POP checker will have to select "Authorize" option and enter any one of the search parameters - Acknowledgement Number or PRAN and click on Submit button.

Personal Details Update

☐ Initiate
 ☐ Verify
 ☒ Authorize
 ☐ View Request Status

Authorize Personal Details

Acknowledgement Number	<input type="text"/>
PRAN	<input type="text" value="110031127012"/>
From Date*	<input type="text" value="DD/MM/YYYY"/>
To Date*	<input type="text" value="DD/MM/YYYY"/>

Note

- From Date and To Date will be the request capture date of Personal Details Change.
- Enter any one search criteria, Either Acknowledgment Number or PRAN or from Date and to Date
- The difference between the From and To Date cannot be greater than 15 days

Upon submission of details, a hyperlink will be provided on the Acknowledgement number. The POP will click on the Acknowledgement number in order to approve or Reject the request.

Personal Details Update

☐ Initiate ☐ Verify ☒ Authorize ☐ View Request Status

Authorize Personal Details

Acknowledgement Number	<input type="text"/>
PRAN	110031127012
From Date*	<input type="text" value="DD/MM/YYYY"/>
To Date*	<input type="text" value="DD/MM/YYYY"/>

Acknowledgement Number	Request Date	Request For	Type of Transaction	Maker Entity ID	Maker Entity Name	Status	Last Action Taken	Action
80409202418051507	04-09-2024	110031127012	Modified	1300094	UTI Asset Management Company Limited	Pending	Initiated By Nodal Entity	Approve/Reject

Note

- From Date and To Date will be the request capture date of Personal Details Change.
- Enter any one search criteria, Either Acknowledgment Number or PRAN or from Date and to Date


On clicking of approve/Reject, the POP will be thrown to other screen where POP has to select radio button: Approve or Reject.

Personal Details Update

☐ Initiate ☐ Verify ☒ Authorize ☐ View Request Status

Personal Details to be Updated

PRAN : 110031127012 Subscriber Name : RAVIKIRAN MANOHARBABU SUDDAPALLI
Date Of Birth : 20/01/1986 Date Of Joining : 31/12/9999
Date Of Retirement : 31/12/9999

Change Type	Existing Details	New Details	Uploaded Document
Date Of Birth	20/01/1986	14/01/1986	

☒ I/we hereby certify/confirm that Subscriber is an existing KYC verified customer. The given details and the documents are verified by this office.

☒ Accept ☐ Reject

Remarks

Note

On selecting of radio button, POP will be taken to other screen where POP Will click on confirm and request will be submitted and acknowledgement number will be shown on screen.

Personal Details Update

☐ Initiate☐ Verify☒ Authorize☐ View Request Status

Personal Details to be Updated


PRAN : 110031127012

Subscriber Name : RAVIKIRAN MANOHARBABU SUDDAPALLI

Date Of Birth : 20/01/1986

Date Of Joining : 31/12/9999

Date Of Retirement : 31/12/9999

Change Type	Existing Details	New Details	Uploaded Document
Date Of Birth	20/01/1986	14/01/1986	

☒ I/ we hereby certify/confirm that Subscriber is an existing KYC verified customer. The given details and the documents are verified by this office.

Confirm

Cancel

Note

- All dates are in dd/mm/yyyy format.

Request has been successfully Authorized.

Requested For

PRAN	110031127012
Subscriber Name	RAVIKIRAN MANOHARBABU SUDDAPALLI

Details

Acknowledgement Number	80409202418051507
Status	Authorised
Date of Authorization	10-09-2024
Authorized By - Reg. No	5000085
Authorized By - Name	UTI Asset Management Company Limited

Ok

Please note the below points with regard to Subscriber Mode of Registration.

1. Subscribers registered under MYNPS:

- If the subscriber is registered under MYNPS through Aadhaar, CKYC, or Digi locker then only CRA users will be allowed to update the Subscriber's Name and Date of Birth.
- If a POP/Corporate user attempts to make these updates, an error message will be displayed: "Field cannot be modified as Subscriber is registered on the basis of Aadhaar/Digi locker/CKYC. Kindly contact CRA for clarification if any."
- In such cases, subscriber needs to submit the request to POP and POP shall forward the request to CRA post verification of the request and documents.

2. Subscribers registered under ENPS:

- If the subscriber has been registered under eNPS (Irrespective registration mode e.g. Aadhaar, CKYC, Digi locker/ PAN) and is subsequently mapped under Corporate/POP then only CRA users will be allowed to update the Subscriber's Name and Date of Birth.
- If a POP/Corporate user attempts to make these updates, an error message will be displayed: "Field cannot be modified as Subscriber is registered on the basis of Aadhaar/Digi locker/CKYC. Kindly contact CRA for clarification if any."
- In such cases, subscriber needs to submit the request to POP and POP shall forward the request to CRA post verification of the request and documents.

*** For the Subsequent name change requests, after initiation and authorization by POP/Corporate users, will be submitted to NPS Trust for Verification & Authorization.**

Documents to be submitted by Subscriber:

Document List	Reason for Name Change		
	Marriage	Name Change	Correction & Other
Self-attested gazette copy or the self-attested copy of marriage certificate	Yes	Yes	
Self-attested POI in old name	Yes	Yes	
Self-attested POI in new name	Yes	Yes	Yes
Proof of bank account with new name	Yes	Yes	Yes
S2 Form	Yes	Yes	Yes
Passport in new name (NRI Subscriber)	Yes	Yes	Yes
OCI Card in new name (OCI Subscriber)	Yes	Yes	Yes