



कर्मचारी भविष्य निधि संगठन
Employees' Provident Fund Organisation

(श्रम एवं रोजगार मंत्रालय, भारत सरकार)
(Ministry of Labour & Employment, Govt. Of India)
मुख्य कार्यालय / Head Office

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No.: WSU/9(1)2013/Settlement of claims/TC

Date:

To

15765

2 DEC 2013

All Regional P.F. Commissioners
In-charge of the ROs/SROs.

Subject: Correction in name of PF Member – Provision in Application Software.

Sir,

IS Division has made a provision in the Application Software for correction in the name, Father/spouse name and Date of Birth of a Provident Fund member in the WAR release 4.27. In this regard, the correction in the name, father/spouse name of the member is to be made only on receipt of joint request of the employee as well as the employer alongwith supporting documents. The documents may be any of the following:-

- (i) PAN Card
- (ii) Voters Identity Card
- (iii) Passport
- (iv) Driving license
- (v) ESIC Identity Card
- (vi) Aadhaar Card
- (vii) Bank passbook copy/Post Office Passbook.
- (viii) Ration card
- (ix) Any school/education related certificate
- (x) Certificate issued by Registrar of Birth & Death.
- (xi) Certificate based on the service records of the Central/State Government Organization.
- (xii) Copy of electricity/water/telephone bill in the name of the claimant.
- (xiii) Letter from a recognized public authority or public servant verifying the identity and residence of the member to the satisfaction of the competent authority.


2. In all such cases, correction in the name may be approved by RPFC-II/OIC of SRO or RPFC-II (F&A) of RO, as the case may be.

3. The request for change in the date of birth of a member is to be carried out as per the guidelines issued by the Head Office vide circular No. Pension/3/8/OR/I/2005 dated 12.12.2006 (placed at 'office orders & circulars' at Sl. No. 24 of 'old circulars').

4. After following the above procedure, DA (Accounts) shall log into the system and carry out the corrections. The SS (Accounts) will verify and approve the corrections made by the DA (Accounts). The process flow for executing the change is enclosed for reference.

Enclosure: As above

Yours faithfully,

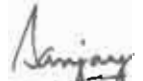


(Sanjay Kumar)

Financial Advisor & Chief Accounts Officer

Copy to:

- 1) PS to CPFC
- 2) PS to CVO
- 3) All Addl. CPFC (Zones)
- 4) All ACC (Head Office)
- 5) Director, NATRSS
- 6) RPFC-I (IS) w.r.t. their UO No. R-I/change request/2009/304 dated 01.11.2013
- 7) All Zonal DD (Vigilance)
- 8) Director (Audit)/DD (Audit)/AD (Audit)/Zonal Audit Parties/ZTIs
- 9) RPFC (NDC) for uploading the same in the website of EPFO
- 10) DD (OL) for issuing Hindi version.



(Sanjay Kumar)

Regional P.F. Commissioner-I (F&A)



(IS Division)
Employees' Provident Fund Organization
Ministry of Labour and Employment
Govt. of India

PROCESS FLOW FOR:

Member Name Change In EPFO Application Software

Version 1.01 (15-10-2013)

(DRAFT)

Developed with:



National Informatics Centre
Ministry of Communications & Information Technology
Govt. of India



DOCUMENT UPDATE HISTORY

S. No	Date of Submission / Change	Description	Document Version No.	TEAM
1.	15-10-2013	Draft version for review	1.01	Sh. Dinesh Kumar Dharni, DD(IS) Sh. Manoj R.S, AD(IS) Sh. Prince, DPA



The functionality for change of **name, father/husband name** or **date of birth** of an existing member has now been incorporated in the function for Form-5 Data (Establishment>>Transaction>>Form 5/3PS – Date Of Joining). The facility to edit **father/husband name** and **date of birth** through MEMBER >> Master > FORM5 / FORM9 / FORM10 / FORM2 has now been restricted. A hyperlink to know the history of changes made in these fields has been provided in MEMBER >> Master > FORM5 / FORM9 / FORM10 / FORM2.

The process flow is explained below:-

Role : DA Receipt

Function : Establishment>>Transaction>>Return Log Entry

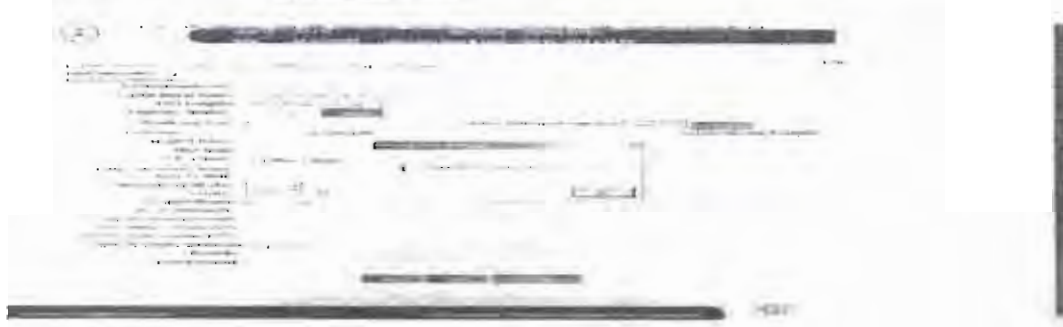
- Obtain an internal return reference number of type 'Form 5/9/3PS/4PS/11F/21F'



Role : DA Account

Function : Establishment>>Transaction>>Form 5/3PS – Date Of Joining

- Select the obtained return reference number
- Enter the employee number and press tab
- The system will prompt to press search button if member already exists in system
- Press 'Search' button to get the details

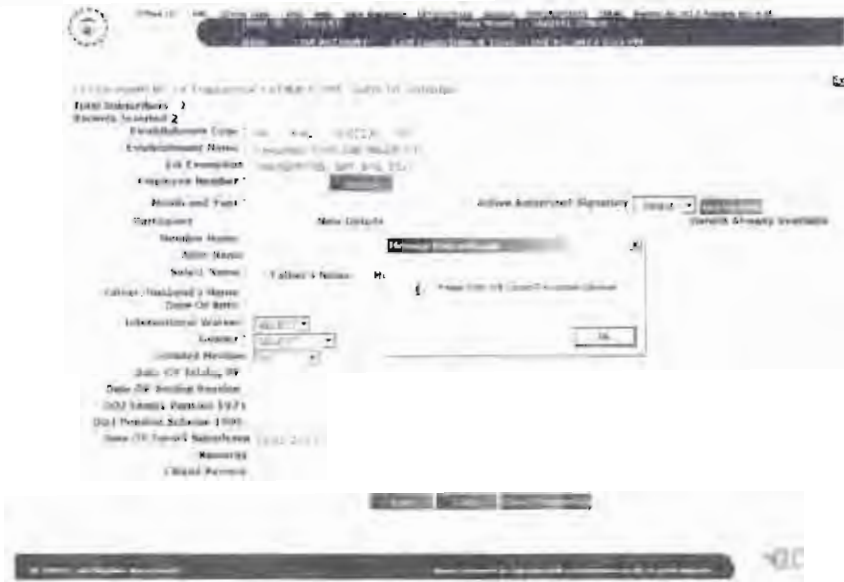




- The member name, father name and date of birth etc can be changed using this functionality
- In addition to member details, the note sheet number and date are also required to be provided in case there is change in Member Name, Father/Husband Name or Date of Birth. The note sheet number and date in this context is the reference to document on which the approval for change of member's name was obtained from the competent authority.
- Press the save button once all the relevant details are filled or changed.

- In case of new member, system will not ask to press search button
- Fill all the relevant details
- Press save button

- Once all the records are saved, press 'Close Transaction' button
- System will prompt for entering close remarks, press OK and give close remarks



The screenshot shows a web-based form titled 'New Details'. The form contains several sections:

- Establishment Code:** 10000000000000000000
- Establishment Name:** 10000000000000000000
- Employee Number:** 10000000000000000000
- Month and Year:** 10/2010
- Establishment Category:** 10000000000000000000
- Employee Name:** 10000000000000000000
- Employee Address:** 10000000000000000000
- Employee Date of Birth:** 10/10/1970
- Employee Gender:** M
- Employee Religion:** H
- Employee Date of Joining:** 10/10/10
- Employee Date of Termination:** 10/10/10
- Employee Date of Retirement:** 10/10/10
- Employee Date of Pension:** 10/10/10
- Employee Date of Superannuation:** 10/10/10
- Employee Date of Death:** 10/10/10

 At the bottom of the form, there are buttons for 'Save', 'Close Transaction', and 'Cancel'. A 'Close Transaction' dialog box is also visible, prompting for remarks.

- Press 'Close Transaction' button after entering close remarks to submit the record for final approval
- Get the record approved from SS Accounts



This screenshot is identical to the one above, showing the 'New Details' form. The 'Close Transaction' button at the bottom is highlighted, indicating the final step of the process. The 'Close Transaction' dialog box is also visible, showing the 'OK' button.



Note :-

The Member name change history can be viewed at the time slash form entry using the function MEMBER >> Master > FORM5 / FORM9 / FORM10 / FORM2.

- Press 'Changed History' button



- The history will appear in separate box showing all the relevant details.

S No	Form Ref No	Membership	Member Name	DOB	Father Name	Created By	Created Date	Verified By	Verified Date	Null Sheet No	Null Sheet Date	Modified On
1	MEM04062013	MEM04062013000000000000	HAJINWAR SINGH	07-06-1985	DEVI SANGHAN SINGH	201302	18-08-2013	201311	10-08-2013			22-10-2013 14:29:42
2	MEM0212013	MEM021201300000000000	HAJINWAR SINGH	07-06-1985	ADITI	201301	22-10-2013			1	22-10-2013	

Here, "Modified On" shows the date and time on which the details were altered. The last record in the list shows the present approved member details in the system.