### **UNIVERSAL ACCOUNT NUMBER (UAN)**

# USER MANUAL ON UAN FUNCTIONS IN UAN Driven Member PORTAL JULY 2014



IS DIVISION

EMPLOYEES' PROVIDENT FUND ORGANISATION

Head Office, New Delhi

## USER MANUAL ON UAN FUNCTIONS IN UAN DRIVEN MEMBER PORTAL

#### **SCOPE OF THE DOCUMENT:**

EPFO has launched a Universal Account Number (UAN) driven Member Portal to provide a number of facilities to its members through a single window. Member has to activate his/her registration to avail various facilities such as UAN card download, member passbook download, updation of KYC information, listing all his/her member ids to UAN, file and view transfer claim. As of now, only active members, for whom employer has uploaded the Electronic Challan-cum-Return for the wage month of Jan 2014 onwards (who have been allotted UAN) would be able to register themselves on UAN driven Member Portal. For registration, member has to obtain UAN from his/her employer alongwith member ID. Member's mobile number would be required to activate registration.

#### **OBJECTIVE OF UAN:**

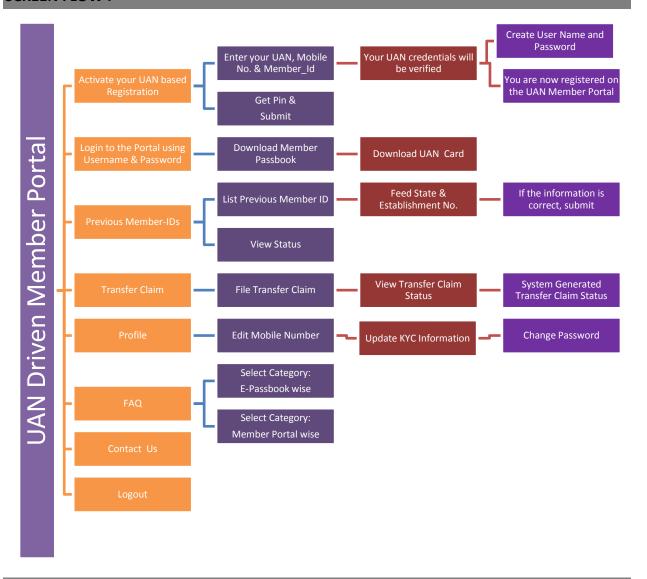
A universal number will be generated for each of the PF Account Number at EPFO NDC. The UAN will act as an umbrella for the multiple Member Ids allotted to the same individual. The idea is to concatenate multiple Member Identification Numbers (Member Id) allotted to a single member under single Universal Account Number. This will help the member to view details of all the Member Identification Numbers (Member Id) linked to it. If a member has already been allotted Universal Account Number (UAN) then he/ she may provide the same to new establishment/ employer which in turn will mark the new allotted Member Identification Number (Member Id) to the Universal Identification Number (UAN).

The main objective behind this new function is to capture KYC details of its members in order to eliminate the dependency on the employer and improve the quality of service. The KYC details will be tagged against the allotted UAN rather the member id thereby eliminating the redundancy.

#### **PRE-CONDITIONS:**

- Must exist in the ECR w.e.f. Jan 2014 onwards.
- Must obtain UAN no. and member id from employer.
- Activation of the registration is mandatory.
- Has to create user name and password for accessing UAN driven member portal.
- Must have scanned copies of the KYC documents to be uploaded.

#### **SCREEN FLOW:**



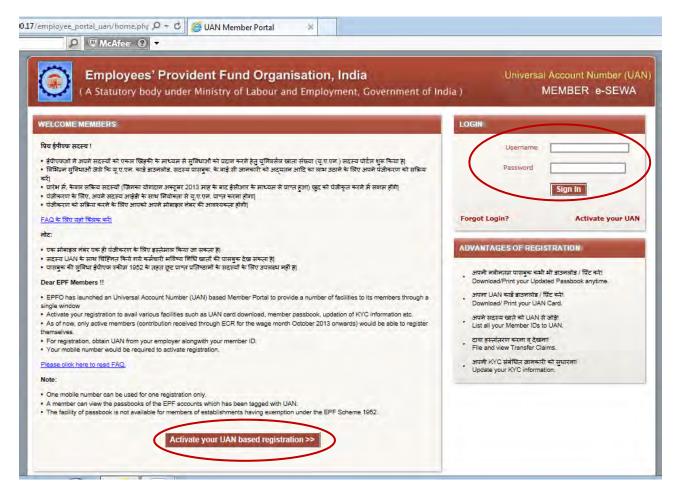
#### **EXPLANATION THROUGH SCREEN SHOTS:**

The member can avail the following facilities through UAN driven member portal:-

- Activation of Member's UAN Registration by entering their UAN, Mobile No. & Member Id.
- Login to the Portal using Username & Password created by Member only.
  - Download
    - Download Member Pass Book
    - Download UAN Card
  - Previous Member-IDs
    - List Previous Member ID
    - View Status
  - Transfer Claim
    - File Transfer Claim
    - View Transfer Claim Status
    - System Generated Transfer Claim Status
  - Profile
    - Edit Mobile Number

- Update KYC Information
- Change Password
- o FAQ
  - E-passbook wise
  - Member Portal wise
- Contact us

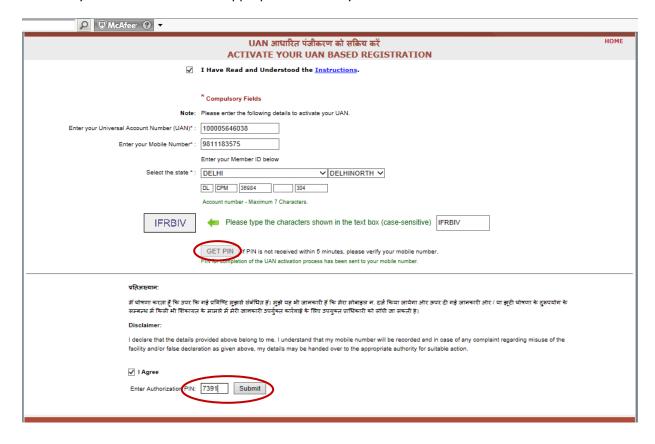
The screen given below facilitates members to opt for activation of their UAN based registration as well as login to this Portal. As this is a first screen of this portal, instructions to be followed by Members for its full utility alongwith information and advantages of this portal are well defined. Hyperlink for FAQ has also been given.



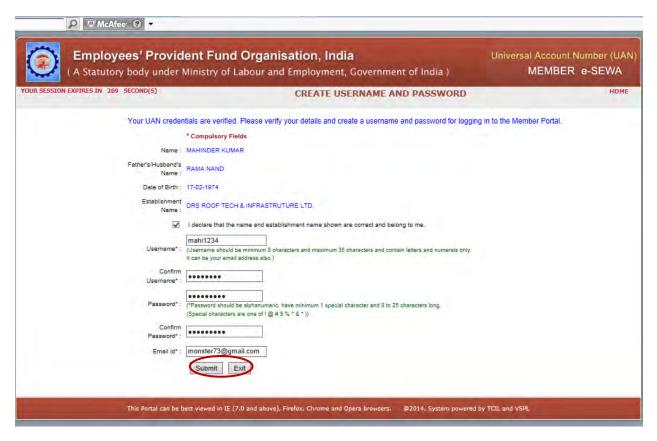
Once member press the radio button 'Activate your UAN based registration', following screen appears wherein member has to tick on the option given that he/she has read and understood the instructions.



After ticking on the above option, the following screen allows members to actually activate their UAN based registration. Member has to feed his/her UAN, mobile no. and member\_id. After feeding the characters shown there on the screen, member has to press the radio button 'Get Pin'. Within 5 minutes, pin will come on his/her mobile no. Using that pin, he/she has to submit the record declaring that the details provided belong to him/her and he/she understands that his/her mobile number will be recorded and in case of any complaint regarding misuse of the facility and/or false declaration, his details may be handed over to the appropriate authority for suitable action.



Once the submit button is pressed, following screen will appear which will show that member's credentials are verified. This screen allows the member to create username and password for login to this portal to have an access of the facilities provided in the UAN driven Member Portal.



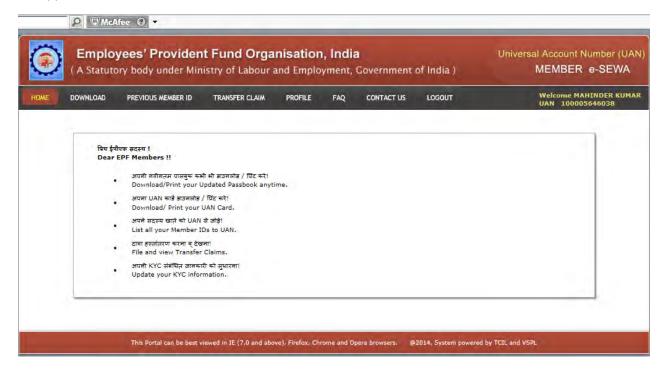
After submitting, following screen will come and message will go to the member's phone for disseminating his/her username and password to access UAN driven member portal. Member must record this username and password to use it further.



Once member has activated his/her UAN based registration, he/she can any time login to the portal by using his/her username and password created by himself/herself.



Sign in with correct username and password will enable the user to switch to next screen which will appear as below:-



The screen above address member by member's name and UAN on the R.H.S. and displays instructions alongwith information and facilitates members to Download Passbook/UAN Card, Tag Previous Member ID/View Linking Status, File Transfer Claim/View Transfer Claim Status/System

Generated Transfer Claim Status, Edit Mobile Number/Update KYC Information/Change Password, View FAQ, Contact Us and Logout.

Download button facilitates member to download passbook and UAN Card.



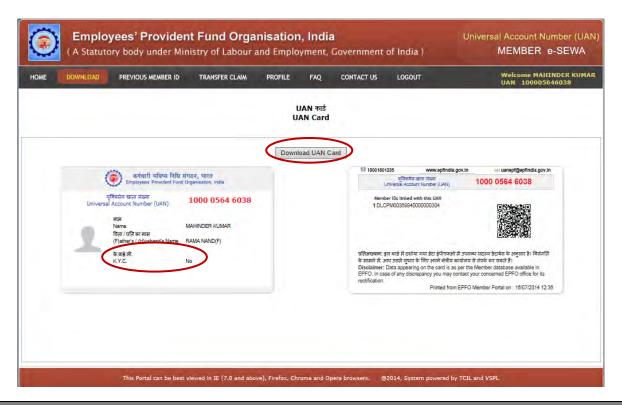
When member selects an option 'Download Passbook' following screen will appear showing the Member Passbook. There is a radio button 'Download Passbook' on the RHS on top of the screen which enables member to download the pdf of passbook.



#### The pdf of passbook will appear as below:-



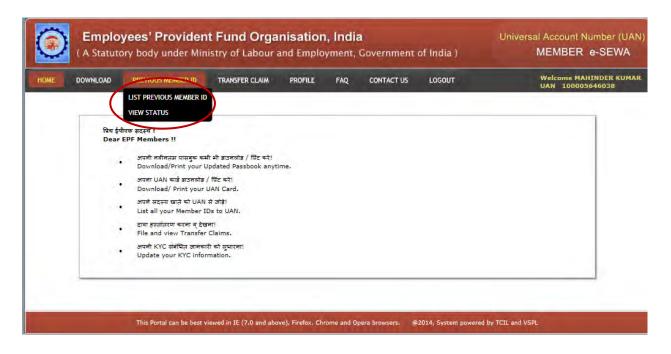
The following screen shows front and back side of the member's UAN Card. Download UAN Card option is given on this screen which provides PDF format of the same. Front portion of the UAN Card displays UAN, Name, Father's/Husband's Name, Member-ID, Photo and KYC. Back side of the Member's UAN card displays five Member-IDs linked with this UAN alongwith helpdesk no. and website. If KYC of this member is uploaded by the employer, it will reflect on the front side of the UAN card by displaying 'Yes' in front of KYC. In case of non availability of KYC, it will always reflect 'No' in front of KYC on the UAN Card.



#### PDF of UAN Card will look like as below:-



Previous Member ID allows member to tag previous member id as well as view linking status.



Member can feed the details of his/her previous member id to be linked with UAN. The name in the previous member id should match with the name of current member id. Otherwise, system will not allow the member to link the previous member id with UAN. The screen below shows the details of the previous member id to be linked with UAN. Member has to tick the check box which says that the information displayed is correct and member account belongs to him/her and submit. Once member press the button 'Submit', he/she will be asked to ensure through the message. If he/she is sure, can press ok. Otherwise, he/she can cancel it.



When 'OK' is pressed by the member, following screen will appear. Member can check status under previous member id by clicking the link given 'View Status'. To link more previous ids, you can again select the state, office, feed member id and get the details:



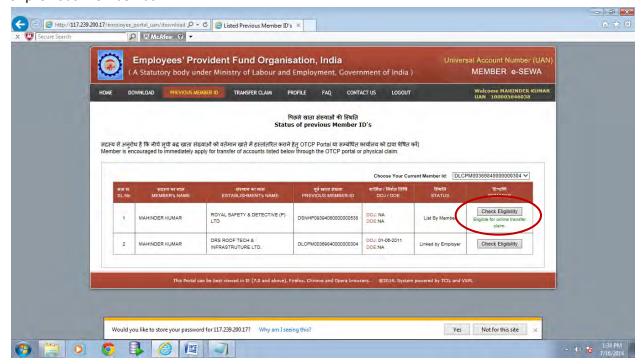
By choosing a link 'View Status', following information can be seen :-



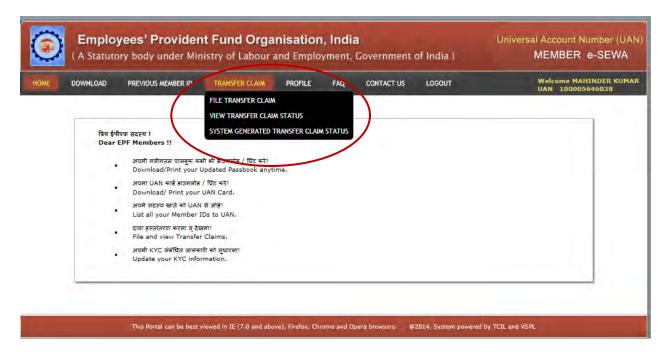
Now by choosing current member id, member can see the eligibility for online transfer claim. For this, he/she will have to press the radio button 'Check Eligibility' given on the RHS of the table with previous member id. If he/she is eligible, it will reflect under the radio button 'Check Eligibility' as below:-



Member can also opt 'View Status' from the 'Previous Member ID' menu to view the status of previous member ids.



The next facility to be given to member is to transfer claim online through this portal. This activity is under progress at EPFO, NDC level and will soon be activated.



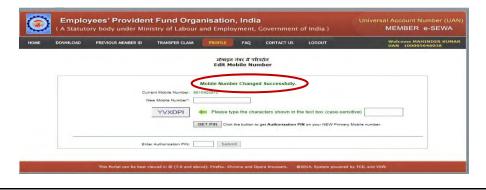
Member has an option in 'Profile' to edit mobile number, email-id, update KYC information and change password. Can be clearly seen in following screenshot:



Following screen allows member to edit his/her mobile no. After feeding the required details, member has to get pin on the new number, feed the pin and submit as below:



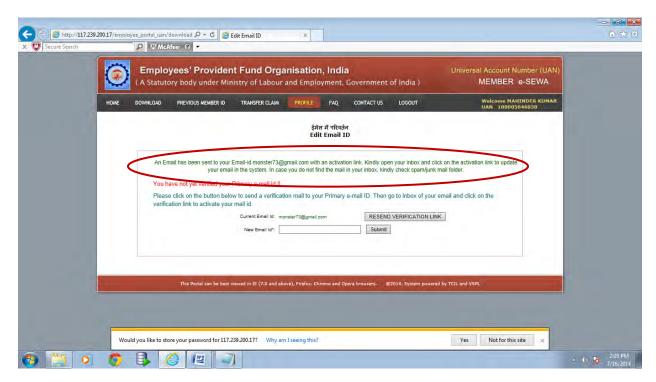
Following message will come on the screen after submit button is pressed. One sms on your new number will also come informing you that you have successfully changed your mobile number on .... date on UAN driven member portal and your new number is .... against UAN.....



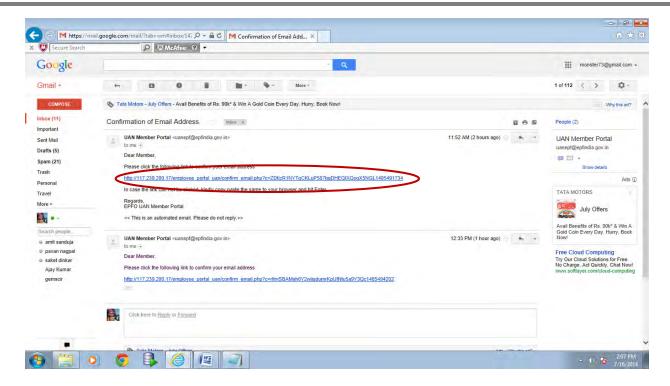
Member can also edit email id through an option given in Profile. First of all member has to verify his/her primary email id. If it is not verified, he/she will have to click on the button 'Resend Verification Link' to send a verification mail to his/her primary email id. Then member has to go to inbox of his/her email and click on the verification link to activate his/her mail id.



After pressing the link to resend verification link, following screen will appear:



Now member has to open inbox and click on the activation link to update email in the system. In case, member does not find the mail in his/her inbox, he/she will have to check spam/junk mail folder. Following link is given on email:-



On pressing the link given in email, following message will appear:-



Now if email id is to be changed, the procedure is same as above. Just feed the email id to be considered. Link will be given in inbox of your email for activation of the same. You will have to select the link and your new email id will be verified for purpose of UAN driven member portal.

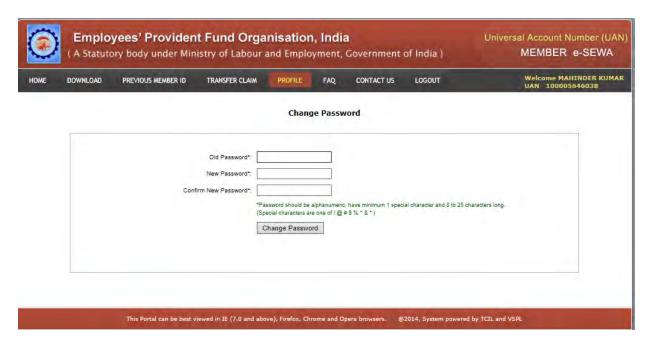
Member can update his KYC from this portal only. He/she will have to select an option 'Update KYC Information' from the Profile Menu, select his type of document from the bar as shown below in the screen, feed the document no., name and attach the scanned copy of that particular document. Member will have an option to either approve it or reject it. If member is sure

about his details, approves it, it will remain pending in his portal till the time employer does not approve it.

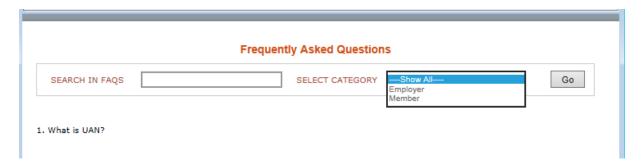
(screen shot to this effect is to be appended as this time it is not functional)



Member can change his password through the option 'change password' from the Profile menu.



There is FAQ in the UAN driven member portal. Member can select the category as required. The screen showing FAQ is given below:



The option 'Contact us' provides the following information like website, helpdesk no. etc. Links have been given to contact the required links:-

