Protean eGov Technologies Limited



Standard Operating Procedures

For

Subscriber Details Modification by POP

Version 1.1

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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

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Procedure for updating subscriber details of Subscribers

Modification is a two-step process:

A. Capturing of Master details of Subscribers in CRAsystem 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 clickon 'Transaction' menu and further click on 'Subscriber Personal Details Update'

Scheme Preference Change	er Download Nodal Offices Upload Error Rectification Module CSRF Submission Details Exit Withdrawal Request Knowledge Centre Corporate Registration Authorise Shift to Karvy
Intra POP Subscriber Shift Request	
Authorize Transaction	
Tier-2 Activation	
Update Subscriber Details	 Status of Maintenance Request
Tier-2 to Tier-1 Switch(One Way Switch)	
Update Subscriber Tier-2 Details	Transaction Type " (Select V
Subscriber Shifting	PRAN
Authorize Subscriber Shifting	Ack No /FRN /Receipt No. ** Carture From Date Carture From Date
Initiate Conditional Withdrawal	Capture To Date
Verify Conditional Withdrawal Request	Search Reset
FATCA Self Certification	
FATCA File Upload	Note
FATCA File Status	* Prease enter the Ack No. or Provvercept number provided by the Hoost Uncer/UP-SP at the time or submission or the warmenance request.
Nodal Bank Details Update	
Subscriber Bank Details Update	Retived life ba cabova NDS ban ava
Authorize Subscriber Shifting by Source	
Verify Subscriber Shifting	Home Contact Us System Configuration / Best viewed Entrust Secured Privacy Policy Glievance Redressal Policy
Subscriber Personal Details Update	iavascriptsubmituri(//SubPersonalDtisUpdateRedirect*

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.

pdate Personal				0	
	Details				
	Permanent Retirem	ent Account Number (PRAN)*	110031127012		
		Submit	Cancel		



	· Indiata	O Verty OA	affordate	O Vey Request Status	
Existing Person	nal Details			Contraction of the second	
Long / con					
	PRAN	. 1100	31127012		
	Subscriber's Name	RAVI	KIRAN MANOHA	RBABU SUDDAPALLI	
	Date Of Birth	2001	/1986		
		-	1		
		Edit Cancel			
		(For UOS Su	ıbscriber)		_
		0.4.7	O A B C	0.16 0.1611	
		O verny		View Request Status	
sting Personal	III - 4 - 11 -				
Ū.	Details				
Ŭ			404246700		
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	PRAN Subscriber's Name		1101346780 THVDHNH 1 21/05/1992	41 THNGH	
	PRAN Subscriber's Name Date Of Birth		1101346780 THVDHNH 1 21/05/1992 31/05/2050	41 THNGH	
	PRAN Subscriber's Name Date Of Birth Date Of Retirement		1101346780 THVDHNH 1 21/05/1992 31/05/2050	41 THNGH	
	PRAN Subscriber's Name Date Of Birth Date Of Retirement	Edit	1101346780 THVDHNH 1 21/05/1992 31/05/2050	41 THNGH	
	PRAN Subscriber's Name Date Of Birth Date Of Retirement	Edit Ca	1101346780 THVDHNH 1 21/05/1992 31/05/2050	41 THNGH	
	PRAN Subscriber's Name Date Of Birth Date Of Retirement	Edit C For Corporate	1101346780 THVDHNH 1 21/05/1992 31/05/2050	41 THNGH	
	PRAN Subscriber's Name Date Of Birth Date Of Retirement	Edit Ca	1101346780 THVDHNH 1 21/05/1992 31/05/2050	41 THNGH	
	PRAN Subscriber's Name Date Of Birth Date Of Retirement	Edit C For Corporate	1101346780 THVDHNH 1 21/05/1992 31/05/2050	41 THNGH	
	PRAN Subscriber's Name Date Of Birth Date Of Retirement	Edit Ca	1101346780 THVDHNH 1 21/05/1992 31/05/2050	41 THNGH	
	PRAN Subscriber's Name Date Of Birth Date Of Retirement	Edit Ca	1101346780 THVDHNH 1 21/05/1992 31/05/2050 ancel	41 THNGH	

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.



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.

PRA	N: 15	0031127012			Sul	bacriber Na	me: RAV	KIRAN MAN	NOHARBABU SUDDAPAL
hange Type		Excetting Value	New Value		Reason for Cl	hange	Document Py	the .	Upload Document
							Self-attente copy	f gazette	Choose File No file choose
							Self-attesta old name	I POI in	Choose File No file choose!
		RAVIKIRAN	RAVIOBAN				Self-attento new name	r POI in	Choose File No Tile choiren
Subscribern	Name	MANOHARBAB	MODLE		NAME CHA	NGE 🛩	Extract of se	inice.	Chanter Film the film
		U SUUDAPALU	SUDDAMALLI		-SELECT-		records with name	new	-chesen
					NARRAGE NAME CHA	NGE	Proof of bar with new na	R account me	Choose File No Sie chosen
					OTHER		S2 Form		Choose File Itis Tie chosen
-	anne Turne	Faiath	an Vintan	None Volum		Decement 1	-	History Dov	and a second
		-		1 This is a second			100		
	Date Of Be	18 20101	1996	20/01/190		-SELECT		Choose 73	No 9. ; set

Please note that if thesubscriber is registered through Aadhaar, CKYC, or Digilocker, modifications are not permitted via the POP login. Insuch cases, the Subscriber/POP is requested to raise a grievance through the following link:

https://cra-nsdl.com/CRA/cgmsMenuOnloadForSub.do

The request will be rocessed by the CRA only after receiving the necessary approval from NPS Trust.

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PRAN: 1	10031127012			5	ubscriber Na	me: RAVI	KIRAN MANOHAREA	ABU SUODAPALLI	
hange Type	Existing Value	New Value		Reason for G	Change	Document Ty	pe Upload (Document	
	RAVIKIRAN	RAVIORAN	RAVIKIRAN MANOHARBABU						
Subscriber's Name	MANOHARBAE	млюнля			- v				
	0.000000000000	SUCCAPAL	u						
			•						
Change Type	e Exp	sting Value	New Value		Document 1	ype	Upload Document		
Date Of E	kirth 20/	01/1986	23/01/190/	1	-SELECT		Choose File No 1	sen	
Note - Document sho F we hereby certify Physical PRAN Carr	uid be in "goog "g vicentism that Subs d Required? N	og, * pog, or * pdf fi criber is an existing IO	ernat and size of g KYC verified cu	document she stomer. The g	PASSPOR DRIVING PAN CAR AADHAAJ VOTERS	RT LICENSE D R CARD / LETT IDENTITY CAR DOLLMARKE	TER ISSUED BY UNIC RD	QUE IDENTIFICATIO	IN AUTHORITY OF INC
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Trescent Description Existing Value New Value Document Type Upload Document O bate Of Birth 25:05/1992 21:05/1992 21:05/1992 -00.LECT- Choose File Notify the Summer • Date Of Retinement 21:05/2059 31:05/2056 -SELECT- Choose File Notify the Summer Notify: Document should be in "upog, "upog or " pdf formul and size of documents and size of the Subscripter. The given details and the documents active available with us. Further necessary name change has been carried out in service records of the Subscripter. The given details and the documents active and was vertical by this office. Me all per the service records of the Subscripter. The given details and the documents active and was vertical by this office.	5 Subsc	riber's Neme	Name THVDHNH THNGH		MEDICE		-SELECT- V				
Change Type Existing Value New Value Document Type Upload Document Date Of Birth 21:05:1992 21:05:1992 -00.LLC1- -00.LLC1-<		al contra			THEOR						
Date Of Birth: 25:05/1992 21:05/199 21:		Change Type		Calatie	g Value	New Value		Document T	Abe .	Upload Do	current :
Date Of Retinement 31.05/2050 31.05/2050 31.05/2050 -SELECT- Choose File Note: Document should be in "geg, "gog, "grg, or "geft format and size of document should ApPOINTMENT/OFFER LETTER MPLOYEE ID CARD we as per the service not available with us. Further necessary name change has been carried out in service records of the Subscriber. The given details and the document subscribe we as per the service not available with us. Further necessary name change has been carried out in service records of the Subscriber. The given details and the document subscribe		O Date Of B	irth	21/05/	1992	21/05/196		-BELECT	- *	(Chemise 7)	No.1. men
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(Screen for DOR modification)

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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'.

Subscriber's N	lame	RAVIKIRAN MANOHAR U SUDDAP	BAB	МАНОНА	RBABU	-SELECT	- +			
				SUDDAP	ALLI					
Chan	ge Type	6 0	Existing	Value	New Value		Document Type		Upload Document	
	ate Of B	inth	20/01/1	986	25/01/198	6 🚍	-SELECT-		Choose File No 8	
			•							
Note Docum	unt shou	Ad be in " jpop	1 100	prig or * pdf	format and size of	document sh	ould be between 2	KB to 5M	8	
2 V we hereb	y certify	confirm that I	Subscrib	er is an exist	ing KYC verified cu	atomer. The g	iven details and th	e docum	ents are verified by this office	
Physical PRA	N Card	Required?	NO				*			
			NO							
1) Revised aP	RAN CA	ed can be dow	YES							
2) Re-print of	PRAN	Card through	this mod	le is a billabi	e transaction and	units pertainin	g to the charges v	d be red	beemed from your PRAN. For detail	a. of
charges, pleas	e visit h	the summing	ecra ned	R co le						
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All dates are in	ddimm	lyyyy format								
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Date of Birth, D	Junté of J	Joining and Di	ate of Re	drament doc	uments showly be	in * loeis * log	" ping or " pdf form	nat. Size	of document should be between 2	

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

Initial ew Personal Detail	O Verty	O Authorize	O Vew Request Status
PRAN : 110031127012 Date Of Birth : 20/01/1 Date Of Retirement : 3	506 1/12/9999	Subscriber Name : Date Of Joining : 3	RAVIKIRAN MANOHARBABU SUDDAPALLI 1/12/5959
Change Type	Existing Details	New Dotails	Uploaded Document
Date Of Birth	20/01/1986	14/01/1906	٤
U we hereby certifyic	onfilm that Subscriber is an existing	KYC verified customer. The given de Confirm Cancel	sails and the documents are verified by this office.

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Personal I Pian 10031127912 New Personal I Pian 10031127912 New Personal I Subscriber Name RAVIKIKAM MARIOHARIBABU New Personal I Maker Details Maker Details Maker Details Acknowledgement Number B0490222418051507 Date Of Birth Date of Initiation 04-99-2024 Total Birth Date of Initiation 04-99-2024 Initiated By Notal Emity Date of Initiation 04-99-2024 Initiated By - Name UTI Asset Management Company The the office It we head Et y this office It y this office	THE PROPERTY OF	Request has b	een successfully initiated.	Contraction of the
Personal I PRAN 11031127012 New Personal New Personal PRAN 110031127012 Subscriber Name SUDCARALLI New Personal Maker Details PRAN Acknowledgement Number B0409202418051507 Date of Birth Status Birtheod By Nodal Energy Date of Birth Date of Birtheod 04.09.2034 New heart UTI Assort Management Company Et y this office		Request Raised For		
PRAN 11001122012 Subscriber Name RAVIKIRAN MANCHARBABU SUDDAPALLS Maker Details PRAN 11001 Date Of Birth Charupe Ty Date Of Birth Charupe Ty Date Of Birth I we heard I we heard	Personal I	1029/2		
Nexe Person PEAN : 11002 Dee Of Birth Dave Of Birth I we hand I we hand		PRAN	110031127012	
New Persons PRIAN : 11002 Dares Of Birth Charge Ty Dares Of Birth Waker Defails Acknowledgement Number B0409/202418051507 Status initiated By Nodal Entry Date of Initiation 04.09-2024 Witharded By - Reg. No S00005 Witharded By - Name Urit Asset Management Company Limited		Subscriber Name	RAVIKIRAN MANOHARBABU SUDDAPALLI	
PRAN : 11000 Date of listifiation 04.09.2024 1805 1507 Date of listifiation 04.09.2024 Initiated By - Reg. No 500005 Initiated By - Name Urit Asset Management Company Limited	Main Person		12 (0) (10 (X) (2))	
PRIAN :: TTRC: Date: Of Birth Charge Ty Dee: Of Birth Wintered By - Reg. No Wintered By - Name Wintered By - Name UTI Asset Management Company Limited		Maker Details		
Acknowledgement Number 5040922413051507 Bare Of Birth Change Ty Date of Initiation 04.09.2024 winanded By - Rag, No 500005 Initiated By - Name UTI Asset Management Company Limited Togethered By - Name Company Limited Togethered By - Rag, No 500005 Initiated By - Name Company Limited Togethered By - Rag, No 500005 Initiated By - Name Company Limited Togethered By - Rag, No 500005 Initiated By - Name Initiated By - Rag, No 500005 Initiated By - Rag, No 500005 Initiated By - Name Initiated By - Rag, No 500005 Initiated By - Rag, No 50005 Initiated By - Rag, No 50005 Initia	DEPAN			ENGADA LA
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Change Ty Dees Of fits It we hand to be a furthered By - Name UTI Asset Management Company Limited By - Name Company Limited By - Name Company	Date Of Birth	Status	Initiated By Nodal Entity	
Deex Of By It was hereit It wa	Channel Tre	Date of Initiation	04.09.2024	100
Dawn Of Da T we hand T we hand T we hand T by this office T by this office	Saturd C. Ke	initiated By - Reg. No	5000085	110
I we hered	Dana Of His	Initiated By - Name	UTI Asset Management Company	
	and the second second		Limbo	and the second second
	and the second		- (<u>1</u>	and the store
			ON	
			-	
	C 19945			

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

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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'

Chame Pottererus Change	aler Download Nodel Offices Upload Error Rectification Module: CSRF Submission Details: Eail Withdrawel Respirat: Knowledge Centre: Corporate Registration	n Authorise Shift is Karvy Sh	R to NSOL
dia POP Subscriber Init Registed			
Attorios Transaction			
er-2 Activation			
pdale Subscriber etals	Welcome to Central Recordinepting Agency		
er-2 to Tian-1 whole:One Visy Switch)	Click here Click here to view list of pending withdrawal request	Notification	1410
plate Subscriber Two 3 etails	Click have to view fait of Exit Claim IDs awalling any action	rensection Type	Court
traceiter Shifting	Subscriber is required to purchase the annulty at the time of Exit. To view annulty quotes, please click here View Annuity Quote	latecriber Shifting Source authorization	5
Moton Juknirbei 🔅 Ming	New Subscriber Registration Form (CSRF) will be effective from Dec 1 2017. Ensure that existing CSRF in declation should reach CRA-FC by Nav 2	LAIM ID generation	5
late Conditional Indrawal	Information regarding online submission of FATCA Self Certification in Subscribers logis may be disseminated to your Subscribers. For a	Vithdrawel Request Verification	8
ity Constitional Referenti Request	CRA Helpline for Nodal Offices 1800-222-881 (toll-free)	leset Pin	3
TCA Bell Certification		absorber. Shifting authorization	1
TCA File Uptoalt		whereast Authorites	5
olat Bank Delais		New York Street Streets	1
care becriber Bank Details date	Retired life ka sahara. NPS hamara	• •	
Martin Sakesriber	None - Contact (1) - Statew Conferences - Red Viewel - Extra Statework - Extra Relice - Concerne Barbases Roles		

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 clickon Submit button.

	Initiate	O Verify	Authorize	O View Request Status
thorize Person	al Details			
	Acknowledgen	nent Number		
	PRAN		110031127012	
	From Date*		DD/MM/YYYY	
	To Date*		DD/MM/YYYY	_
te		Sut	omit Reset	
om Date and To Da	ate will be the reque	est capture date of Personal	Details Change.	
nter any one search ne difference betwe	n criteria, Either Ack en the From and To	mowledgment Number or PF Date cannot be greater that	RAN or from Date and to Date In 15 days	

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

) Initiate	0	Verify	۲	Authorize O	View Reque	st Status	
Authorize Persona	I Details							
	Acknowl	edgement Number	г					
	PRAN			11	0031127012			
	From Dat	te*		D	D/MM/YYYY			
	To Date*			DI	D/MM/YYYY		-	
			_					
			Sub	mit Re	set			
Acknowledgement Number	Request Date	Request For	Type of Transaction	Maker Entity ID	Maker Entity Name	Status	Last Action Taken	Action
00400202440054507	04-09- 2024	110031127012	Modified	1300094	UTI Asset Management Company Limited	Pending	Initiated By Nodal Entity	Approve/Rejec
00405202410051501								N/4

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

Personal Details Update

Personal Deta	ils to be Updated —			
PRAN : 1100311	27012		Subscriber Na	me : RAVIKIRAN MANOHARBABU SUDDAPALLI
Date Of Birth : 2	e Of Birth : 20/01/1986			ıg : 31/12/9999
Date Of Retirem	ent : 31/12/9999			
Change Type	Existing Details	New Details		Uploaded Document
Date Of Birth	20/01/1986 certify/confirm that Subscribe	14/01/1986 er is an existing KYC verified	I customer. The giv	en details and the documents are verified by this office.
Date Of Birth	20/01/1986 certify/confirm that Subscribe	14/01/1986 er is an existing KYC verified @ Accept	l customer. The giv O Reject	en details and the documents are verified by this office.
Date Of Birth	20/01/1986	er is an existing KYC verified @ Accept Remarks	l customer. The giv O Reject	en details and the documents are verified by this office.

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

	O Verify (1)	Authorize O View Request Status
to be Updated		
)12	Sub	scriber Name : RAVIKIRAN MANOHARBABU SUDDAPALLI
1/1986	Date	Of Joining : 31/12/9999
: 31/12/9999		
Existing Details	New Details	Uploaded Document
20/01/1986	14/01/1986	٠
	112 1/1986 1: 31/12/9999 Existing Details 20/01/1986	1/12 Sub: 1/1986 Date t: 31/12/9999 Existing Details 20/01/1986 14/01/1986

Reques	sted For		
onal Detai	PRAN	110031127012	
		RAVIKIRAN	
onal Details to	Subscriber Name	MANOHARBABU SUDDAPALLI	
N : 110031127012 Details			SUDDAPALLI
Of Birth : 20/01/1			
Of Retirement : 3	Acknowledgement Number	80409202418051507	
	Status	Authorised	
Туре	Date of Authorization	10-09-2024	
širth	Authorized By - Reg. No	5000085	
e hereby certify/	Authorized By - Name	UTI Asset Management Company Limited	ed by this offic
		_	

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