## **USER MANUAL**

# **JOINT DECLARATION**

(MEMBER PORTAL)



EMPLOYEES PROVIDENT FUND ORGANIZATION HEAD OFFICE, NEW DELHI

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#### Introduction

The Employee's Provident Fund Organization (EPFO) is a statutory body under the Ministry of Labour and Employment, Government of India. EPFO provides social security benefits to more than 22 crore members through the following schemes:

- 1. Employee's Provident Fund Scheme, 1952
- 2. Family Pension Scheme, 1971
- 3. Employees' Pension Scheme, 1995
- 4. Employees' Deposit Linked Insurance Scheme, 1976

EPFO has to deal with various stakeholders during its processes, Members being at the center of focus of all the stakeholders.

The process of Joint Declaration for the correction in UAN profiles by the members is being undertaken as per various circulars. The member data in EPFO's database may be, in some cases, incomplete or has mismatches due to change of establishments by the members.

Due to this ,the member profiles data mismatch leading to rejections of claims. The claims settlement also face certain difficulties across all offices due to various reason related to data mismatch in parameters, namely, (1) Name, (2) Gender, (3) Date of Birth, (4) Father Name/ Name, (5) Relationship, (6) Marital Status, (7) Date of Joining, (8) Reason of Leaving, (9) Date of Leaving, (10) Nationality, (11) Aadhaar Number.

To maintain the correct profile of the member, reduce rejection of the joint declaration, and minimize fraud owing to UAN identity change, the Standard Operating Procedure (SOP) for the Joint Declaration – Member profile correction has been introduced by EPFO and same is being implemented in Unified Portal Application. This document will provide the details of the joint declaration implementation across the interfaces in Unified Portal Application.

#### **Overview**

The Joint Declaration is a joint request of employees duly authenticated by the Employer for the modification/addition of the members' basic profile parameters.

The process includes filing of a Joint Declaration application by the member, approval of JD by the Employer, its receipt in the Field Office and its approval or rejection by the competent authority. The DA/SS as an initiator assigned by the OIC of FO will initiate all such member modification requests through a unified portal. The initiator will examine the JD and the supporting documents submitted and submit the same with his comments to the verifier.

The SS /AO as a verifier will cross-check the member modification requests along with the supporting documents.

The approver RPFC-II/APFC/AO/SS will approve the member modification request after verifying all the supporting documents.

#### Steps to be followed

1. Login to the member interface using your UAN. After login into your member account go to menu, click on *Manage* tab and under it click on *Joint Declaration*.

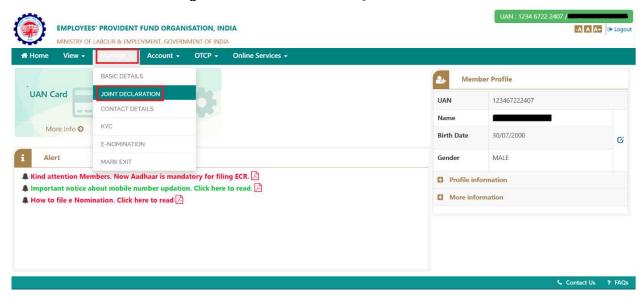


Image-1

2. Select the appropriate Member Id/ PF account no. and Establishment for which you need to make changes and then click on *Get Details*.



Image-2

2.1. If there is already a previous pending request in process for that Member Id/PF account no. then error is encountered as shown in Image-2.1

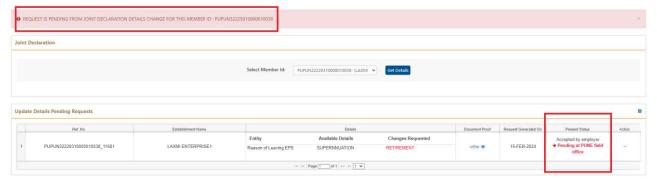


Image-2.1

3. The information pertaining to the member-id/PF account no. present in the database shall be displayed on the screen. The information not available in the database shall be displayed as blank or not available. To enable changes to the required information click on the pencil icon besides the corresponding input boxes.

Provide the correct information desired to be updated against your profile in the corresponding input boxes.

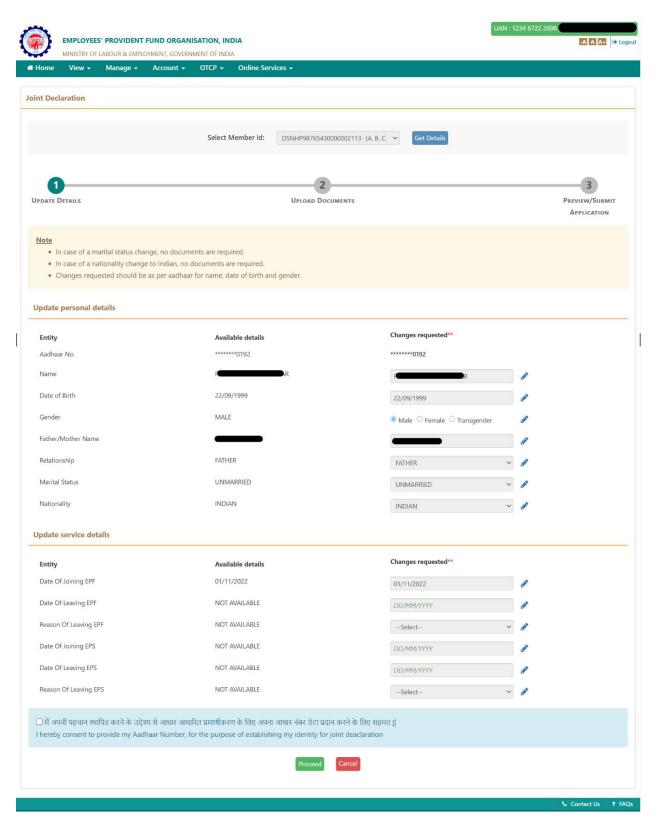


Image-3

4. In order to proceed with the submission of the application, you have to provide your consent regarding changes required in the profile information and get aadhaar OTP for aadhaar OTP based authentication. Click on the checkbox for consent and click on **Proceed.** 

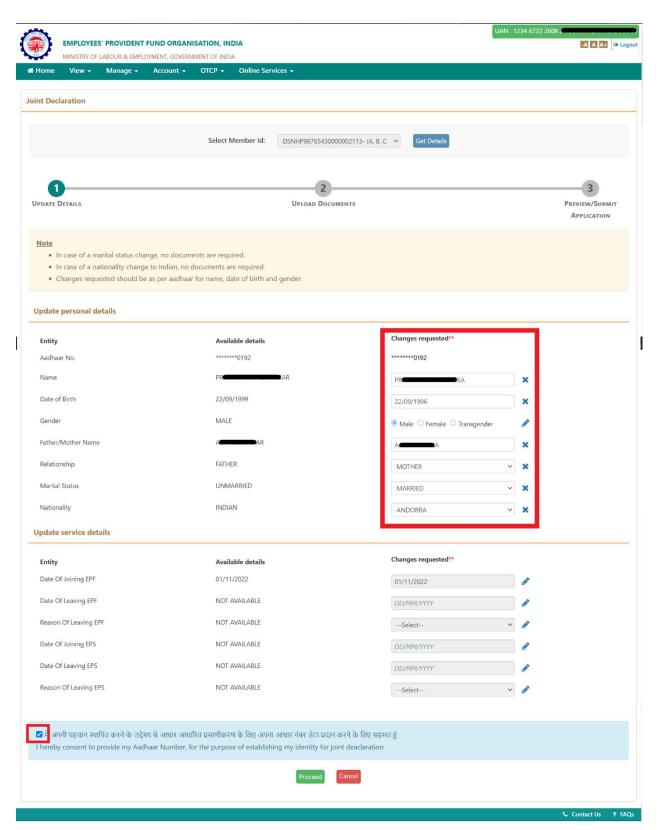


Image-4

5. Documents are required to be uploaded against the attributes to be changed. All those attributes against which the information is requested to be changed shall appear for upload of necessary required document. Select the document proof that you have available for the particular fields. Keep the scanned copy of the document proof ready for updation. Refer Annexure for details.

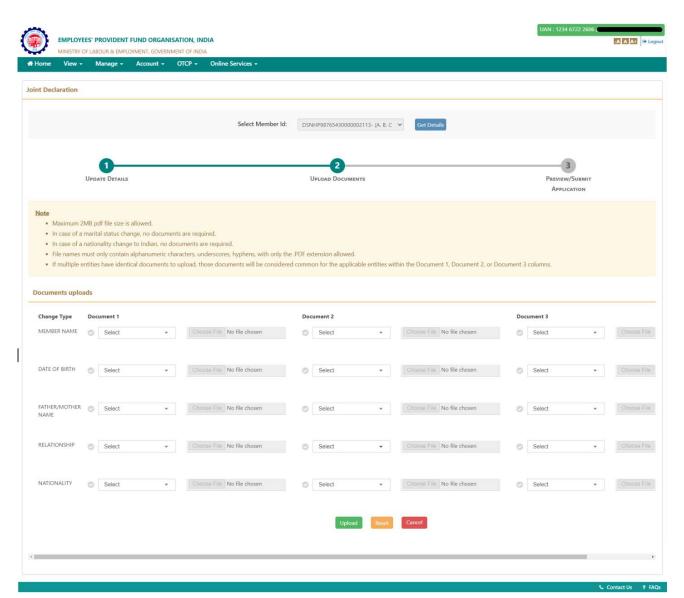


Image-5

- 6. Upload the supporting documentary proof for the document you have selected. To upload click the *Choose file button*.
  - **6.1.** Please ensure the following before uploading the documents :
    - No two documents should have the same name.
    - There shouldn't be any space in the name of the documents.
    - File name must only contain alphanumeric characters, underscores, hyphens.
    - Only .pdf extension is allowed.
    - Maximum allowed size for the pdf document is 2MB.
  - 6.2. If a specific type of document is selected for a particular attribute, and the corresponding proof of that document is uploaded, there's no need to upload the same document again for any other changes that require the same type of document.
  - 6.3. When all documents are uploaded then click on *Upload* to proceed.

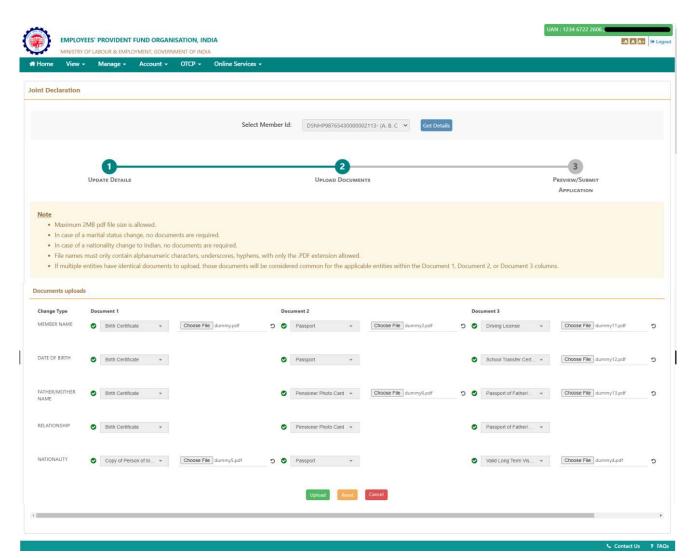


Image-6

7. The summary of the changes requested will be displayed. Verify the requested changes from the summary and check the uploaded supporting documents by clicking on *View all Uploaded Documents*.

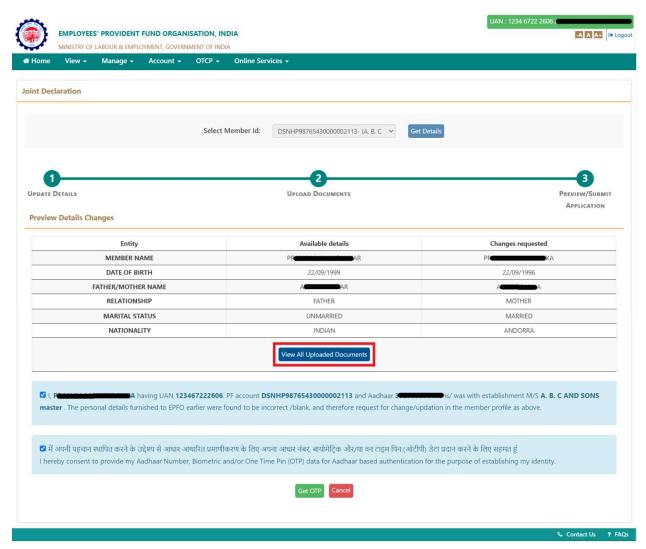


Image-7

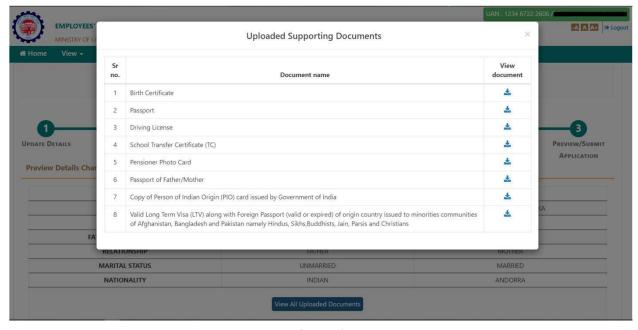


Image-8

8. After verification, read the consent message and if you agree click the two checkboxes for consent-

The consent for reason for change and application of the same jointly with the establishment. The consent for aadhaar OTP based authentication and then click on *Get OTP*.

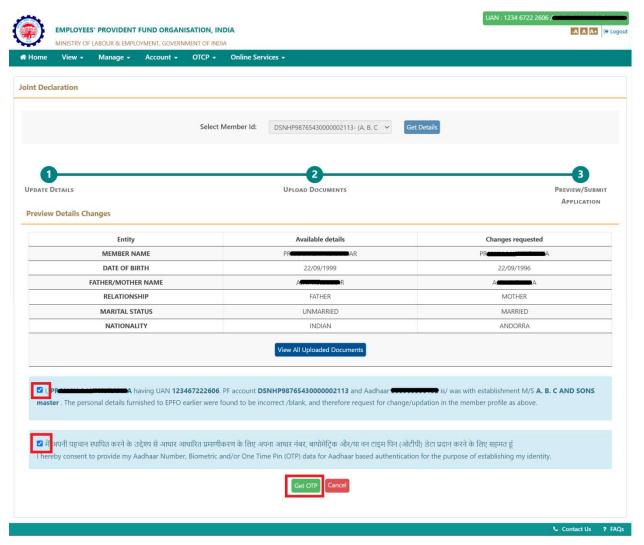


Image- 9

9. An OTP will be sent to your Aadhaar registered mobile number. Enter the OTP received on your mobile and the Captcha displayed and click on *Submit*.

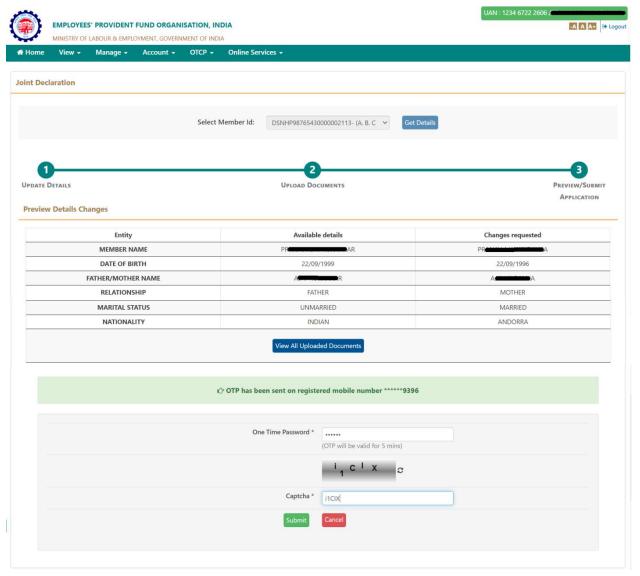


Image-10

9.1. If the details entered are incorrect and Aadhaar authentication is not successful then an error as sown in Image-10.1 occurs.

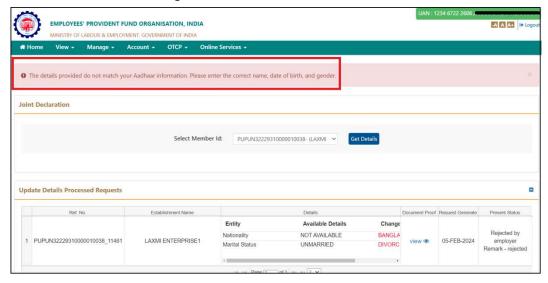


Image-10.1

10. If the verification is successful then you will get a message- *Changes requested saved successfully.* 

You can view the submitted request on the same page under the tab – *Update Details Pending Requests.* 

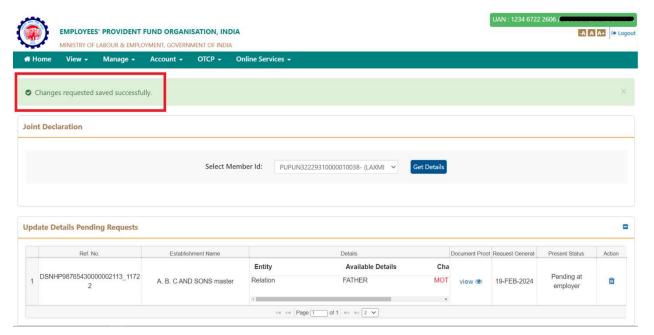


Image-11

11. The status of the request keeps changing as it passess through various stages. It can be checked in – *Update Details Pending Requests* tab under the column *Present Status*.

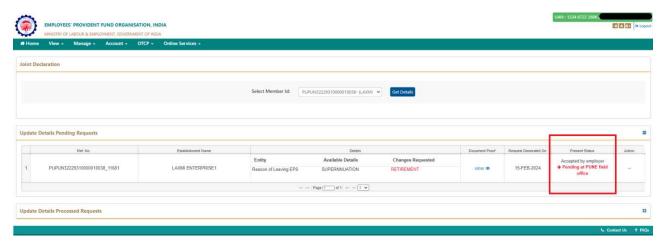


Image-12

12. A pending request can be deleted by clicking on the bin icon in the Action columns under the tab *Update Details Pending Requests.* But note that it can only be deleted till it has not been processed by the employer.

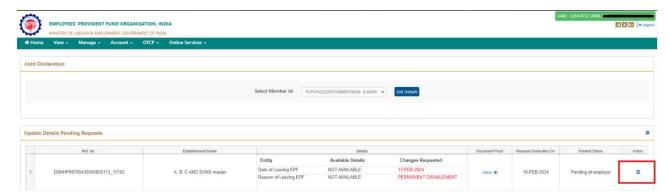


Image-13

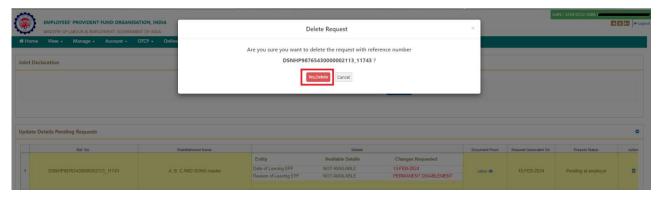


Figure 14

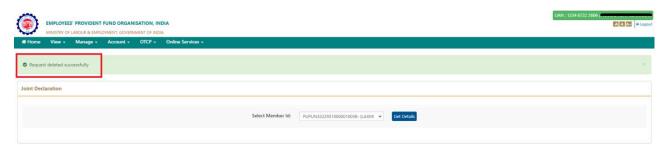


Image-15

13. Finally when the request is processed at field office level or if it gets rejected at employer level, then it gets under the tab – **Update Details Processed Requests**. Under this tab all the previous request history which was approved/ rejected can be seen.

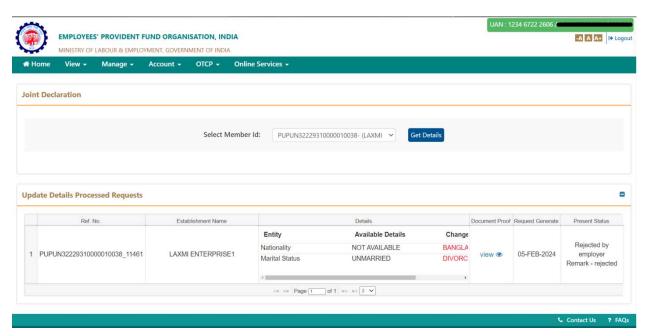


Image-16

### **ANNEXURE**

# LIST OF ACCEPTABLE DOCUMENTS FOR GETTING CORRECTED / UPDATING THE PARAMETERS AS MENTIONED ABOVE.

#### **Table-A (Name and Gender)**

1. Name, 2. Gender						
S. No.	Name of Document					
1.	Passport					
2.	Death Certificate					
3.	Birth Certificate					
4.	Driving License					
5.	Service photo identity card issued by Central Govt./State Govt./ UT Govt./ PSU/ Banks					
6.	School Leaving Certificate (SLC)/ School Transfer Certificate (TC)/ SSC					
	certificate/Mark Sheet issued by board/ University containing name and photograph					
7.	Bank Pass Book having name and Photograph Cross Stamped by bank					
	official					
8.	PAN Card/ e-PAN					
9.	Ration / PDS photo Card					
10.	Voter ID/ e-Voter ID					
11.	Pensioner Photo Card/Freedom Fighter Photo Card					
12.	CGHS/ ECHS/ / Medi-Claim Card with Photo issued by State/ Central					
	Govts./ PSUs/ Rashtriya Swasthya Bima Yojana (RSBY) Card					
13.	ST/ SC/ OBC certificate with photograph ST/ SC/ OBC certificate with					
	photograph					
14.	For Full name/first name change requests: PF Member to submit the Gazette notification of new name along with any supporting document of old name with photograph (Even for 1st instance of the Full name/ first					
	name change)					
15.	Valid Visa along with Foreign Passport (valid only) issued in case of other					
	Foreign Nationals					

16.	Freedom Fighter Card having photo			
17.	Copy of Person of Indian Origin (PIO) card issued by Government of			
	India			
18.	Copy of Overseas Citizen of India (OCI)card issued by Government of			
	India			
19.	Tibetan Refugee Card (Accompanied by one more ID)			
20.	Other Supporting Document			

#### Table-B (Date of Birth)

3. Date of Birth						
S. No.	Name of Document					
1.	Birth Certificate issued by the Registrar of Births and Deaths.					
2.	Marksheet issued by any recognized Government Board or University. School Leaving					
	Certificate (SLC)/ School Transfer Certificate (TC)/ SSC					
	certificate containing Name and Date of Birth					
3.	Certificate based on the service records of the Central/State Government					
	Organizations.					
4.	In the absence of proof of date of birth as above, Medical Certificate issued by Civil					
	Surgeon after examining the member medically and supported with an affidavit on					
	oath by the member duly authenticated by a					
	Competent Court.					
5.	Passport					
6.	PAN by IT department					
7.	Central/ State Pension Payment Order					
8.	CGHS/ ECHS/ Medi-Claim Card issued by Centre/ State/ UTs Govts./					
	PSUs having Photo & Date of Birth					
9.	Domicile Certificate issued by the Government					
10.	Other Supporting Document					

### <u>Table-C (Father/Mother Name and Relationship)</u>

4. Father/Mother Name, 5. Relationship			
S. No.	Name of Document		
1.	Passport of Father/Mother		
2.	Ration card/PDS Card		
3.	CGHS/ECHS/ Medi-Claim Card with photo issued by Centre/ State Govts./ PSUs.		
4.	Pension Card		
5.	Birth Certificate issued by of Birth, Municipal Corporation and other notified local Government bodies like Taluk, Tehsil etc.		
6.	Marriage Certificate issued by the Government		
7.	Photo ID card issued by Central/State Govt. like Bhamashah, Jan-Aadhaar, MGNREGA, ARMY Canteen card etc.		
8.	Other Supporting Document		

#### Table-D (Marital Status)

6. Marital Status			
S. No.	Name of Document		
1.	Marriage Certificate issued by the government		
2.	Divorce Decree		
3.	Passport		
4.	Other Supporting Document		

#### **Table-E (Date of Joining)**

7 Data of Laboration			
7. Date of Joining			
S. No.	Name of Document		
1.	Employee register		
2.	Attendance register		
3.	Appointment letter or any other document as establishment maintain under any central or State labour act		
4.	Letter of establishment on their letter head clearly stating the date of joining and duly signed by Employer or the authorized signatory supported by ECR of the employee during the said period		
5.	Other Supporting Document		

### Table-F (Reason of Leaving)

8. Reason of Leaving				
S. No.	Name of Document			
1.	Resignation letter			
2.	Letter from establishment on their letter head clearly stating the reason ofleaving supported by ECR of the employee during the said period			
3.	Termination letter issued to employee			
4.	Any document as establishment deems fit to establish exit reason of employee duly signed by the Employer or the authorized signatory of the establishment on their letterhead			
5.	Other Supporting Document			

#### Table-G (Date of Leaving)

9. Date of Leaving			
S. No.	Name of Document		
1.	Resignation letter/termination letter		
2.	Experience certificate or any other document as establishment maintain under any central or State labour act		
3.	Wage slip/salary slip/full and final letter		
4.	Letter of establishment on their letter head clearly stating the date of joining and duly signed by Employer or the authorized signatory		
5.	Other Supporting Document		

#### **Table- H (Nationality)**

10. Nationality			
S. No.	Name of Document		
1.	Copy of passport		
2.	Copy of Person of Indian Origin (PIO) card issued by Government of India		
3.	Valid Long Term Visa (LTV) along with Foreign Passport (valid or expired) of origin country issued to minorities communities of Afghanistan, Bangladesh and Pakistan namely Hindus, Sikhs,  Buddhists, Jain, Parsis and Christians		
4.	Valid Visa along with Foreign Passport (valid only) issued in case of Foreign Nationals		
5.	Tibetan Refugee Card (Accompanied by one more ID)		
6.	Other Supporting Document		

#### Table-I (Aadhar)

11. Aadhaar		
S. No.	Name of Document	
1	Aadhaar card/e-aadhaar card with linked active mobile phone	