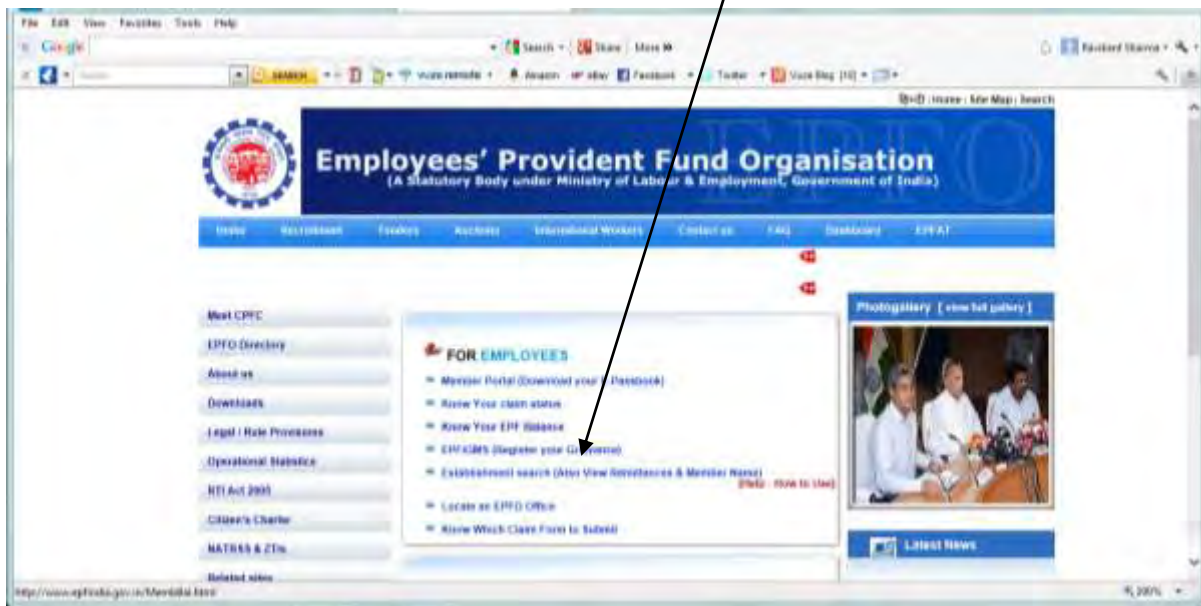


PROCESS FLOW FOR FILING OF ONLINE TRANSFER CLAIMS

To file a transfer claim online, the member ID should be available in EPFO database and the employer should have registered the digital signatures of his authorized signatories with EPFO on the portal.

Please click on the **Online Transfer Claim Portal (OTCP)** under category **“FOR EMPLOYEES”** on the Home page of EPFO website www.epfindia.gov.in .



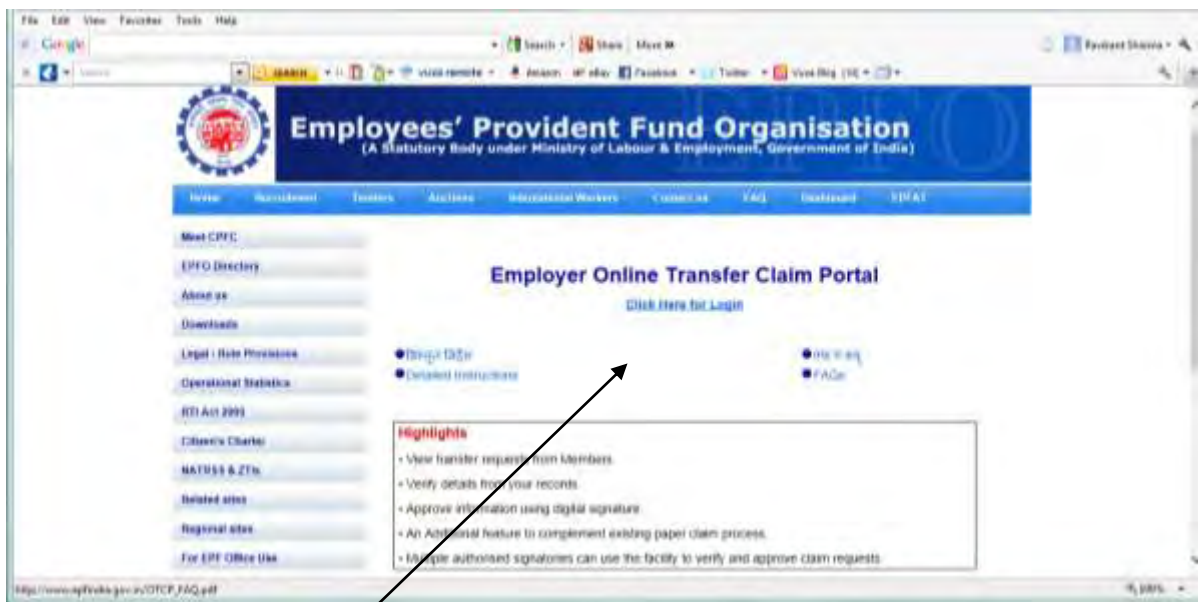
The following options would appear on the screen:

- (a) Check Eligibility for filing Online Transfer Claim
- (b) Detailed Instructions (On clicking on the “Detailed Instructions”, following options would appear:
 - Important guidelines
 - Process flow for filing Online Transfer Claim
 - Process flow for registration on Member Portal

It is advised to go through the guidelines and process flow before the activity).

- (c) Frequently Asked Questions (FAQs)

There is a link on the top to log-in to file Online Transfer Claim Application.

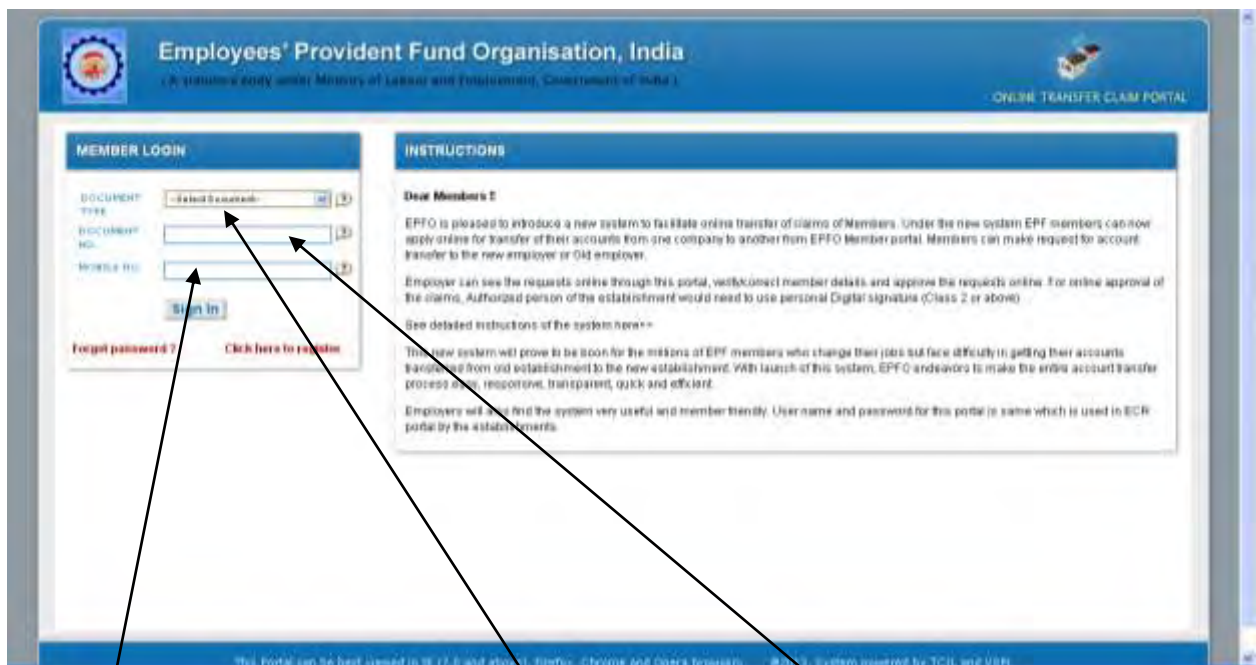


On clicking “Check Eligibility for filing Online Transfer Claim”, the following screen would appear:

To know the eligibility of the member to file an online transfer claim, the member should enter the details of his previous PF Account number and present PF Account number and click on “Check eligibility”.

If the member is eligible to file online claim, then he should be registered on the Member Portal to proceed further. In case he is already registered on the Member Portal, he can click on the “Click here to log-in” link available on the eligibility result screen. Alternatively, he can click on “Click here to register on Member Portal”. The Process flow for the registration on Member Portal has been detailed in the link “Process Flow for registration on Member Portal” under “Detailed Instructions”.

If the member is already registered, he can directly click the link “Click here to log-in to file Online Transfer Claim Application”. Following screen will appear:-



The member has to log-in by selecting Document type, entering Document No. and Mobile No. **The log-in details for this portal are same as are used in Member Portal by the members.**

Employees' Provident Fund Organisation, India
(A statutory body under Ministry of Labour and Employment, Government of India)

ONLINE TRANSFER CLAIM PORTAL

MEMBER LOGIN

DOCUMENT TYPE:

DOCUMENT NO.:

MEMBER ID:

INSTRUCTIONS

Dear Members :

EPFO is pleased to introduce a new system to facilitate online transfer of claims of Members. Under the new system EPF members can now apply online for transfer of their accounts from one company to another from EPFO Member portal. Members can make request for account transfer to the new employer or Old employer.

Employer can see the requests online through this portal, verify/correct member details and approve the requests online. For online approval of the claims, Authorized person of the establishment would need to use personal Digital signature (Class 2 or above).

See detailed instructions of the system here:->

This new system will prove to be boon for the millions of EPF members who change their jobs but face difficulty in getting their accounts transferred from old establishment to the new establishment. With launch of this system, EPFO endeavors to make the entire account transfer process easy, responsive, transparent, quick and efficient.

Employers will also find the system very useful and member friendly. User name and password for this portal is same which is used in ECR portal by the establishments.

This Portal can be used viewed in IE (7.0 and above), Firefox, Chrome and Opera browsers. ©2015. System powered by TCS and VSI.

After login the screen shows as:

Employees' Provident Fund Organisation, India
(A statutory body under Ministry of Labour and Employment, Government of India)

ONLINE TRANSFER CLAIM PORTAL

HOME CLAIM EDIT PROFILE FAQ CONTACT US LOGOUT

REQUEST FOR TRANSFER OF ACCOUNT

REQUEST FOR TRANSFER OF ACCOUNT

Dear Members :

EPFO introduces a new system to facilitate online submission of transfer claims by Members with an objective to make the transfer process transparent, efficient and comfortable for your employees. A member has an option to submit his claim either through his present employer or the previous one.

The employer can view all such claim requests, verify/correct member details, approve and submit the requests online through this portal.

The member should be registered on the Member Portal to avail this facility. The log-in details for this portal are same which are used in Member Portal by the members and accordingly may be used with high diligence.

This Portal can be used viewed in IE (7.0 and above), Firefox, Chrome and Opera browsers. ©2015. System powered by TCS and VSI.

On the menu bar, place cursor on CLAIM. Following options will appear.

- (i) Request for Transfer of Account
- (ii) View status of Transfer Claim

Click on "Request for Transfer of account" to file online Transfer Claim. The following form will appear for entering the details of the member:

Please fill up the details in Part A and scroll down to Part B pertaining to previous PF account as in the screen shown below:

Please fill up the PF Account no. and click on “click here to get Details”.

The details as regards the Name of the establishment, Address of the establishment, PF account held by EPFO office and Member’s Name would appear on the screen. Further, Date of joining, Date of leaving, Father’s/ Spouse’s name and Relationship would appear, if available in

EPFO database. The member needs to mandatory fill up the Date of Birth and other details, if not available. On scrolling down, the Part C of the application pertaining to present PF Account would appear on screen as below:

memberclaimtest.epfoservices.in/request_account_transfer.php

Members Name

Father's/Spouse Name

Relationship

Date of joining the Establishment

Date of leaving the Establishment

PART C: DETAILS OF PRESENT ACCOUNT

PF Account No.

Selected with EPFO Office

Select State

Select Office

Region

Office

Est. Code

Est.

Ac. no.

Click Here To Get Details

Name of the Establishment

Address of the Establishment

PF Account held by EPFO Office

Members Name

Father's/Spouse Name

Relationship

Date of joining the Establishment

Claim attestation through

Previous Establishment

Present Establishment

Note : Member has the option to get their claim been attested by the present or the previous employer. In case of attestation by the previous employer, time taken in settlement will be relatively less.

Preview

On entering the PF account no. of the present PF Account and clicking the “Click here to get details” the Name of the establishment, Address of the establishment, PF Account held by EPFO office and Member’s Name would get populated. Other details i.e. Father’s/ Spouse’s name and Relationship and Date of Joining the fund under present PF Account no. would appear, if available. The member needs to mandatory fill up other details, if not available.

The member will have an option to get the claim attested through the previous employer or present employer.

The application form is completely filled up and the member can go through the completed application by clicking on the “Preview” button.

[IMPORTANT: It must be noted that the member details available in the process flow have been entered only for the testing of the application and has been reproduced for demonstration purpose only.]

The following screen would appear:

Employees' Provident Fund Organisation, India
A statutory body under Ministry of Labour and Employment, Government of India

HOME CLAIM EDIT PROFILE FAQ CONTACT US LOGOUT

Preview Your Account Transfer Application - Form 13
(Please check all details in your PF Account Transfer Application Form-13 before final submit.)

PART A: PERSONAL INFORMATION

Name : BASANT SHARMA
Mobile Number : 9811235120
E-mail id : b.s@gnl.com
Bank Account Number of Member : 01123456789
IFS Code of Bank Branch where the account is maintained : 0004000700

PART B: DETAILS OF PREVIOUS ACCOUNT (WHICH IS TO BE TRANSFERRED)

PF Account no : MPAD0000037000001388
Name of the Establishment : M/S AMAR UJALA PUBLICATIONS LIMITED
Address of the Establishment : SHANDEWA ROAD AGRA 202007
PF Account held by EPFO Office : AGRA
Date of Birth : 18-06-1985
Member's Name : BASANT SHARMA
Father's/Spouse Name : G S SHARMA Relationship : FATHER
Date of joining of the Establishment : 01-12-2008
Date of leaving of the Establishment : 30-06-2008

On scrolling down, the following part of the form would appear:

PART B: DETAILS OF PREVIOUS ACCOUNT (WHICH IS TO BE TRANSFERRED)

PF Account no : MPAD0000037000001388
Name of the Establishment : M/S AMAR UJALA PUBLICATIONS LIMITED
Address of the Establishment : SHANDEWA ROAD AGRA 202007
PF Account held by EPFO Office : AGRA
Date of Birth : 18-06-1985
Member's Name : BASANT SHARMA
Father's/Spouse Name : G S SHARMA Relationship : FATHER
Date of joining of the Establishment : 01-12-2008
Date of leaving of the Establishment : 30-06-2008

PART C: DETAILS OF PRESENT ACCOUNT

PF Account no : UPRLV0000034000000018
Name of the Establishment : AMAR UJALA PUBLICATION LTD
Address of the Establishment : SHAUJAHANPUR ROAD BAREILLY BAREILLY 243005
Date of joining of the Establishment : 01-07-2008
PF Account held by EPFO Office : BAREILLY
Member's Name : BASANT SHARMA
Father's/Spouse Name : GARGA SAGAR SHARMA Relationship : FATHER
Claim attestation through : Previous Establishment

[To change application data, click here.](#)

FZQKTA Please type the characters shown in the text box (case-sensitive)

GET PIN Click the button to get Authentication PIN on your registered Mobile number.

In case of any changes required in data filled up by member, click on the button “To change application data, click here”.

PART C: DETAILS OF PRESENT ACCOUNT

PF Account no : UPBL00035420000002018

Name of the Establishment : AMAR UJALA PUBLICATION LTD.

Address of the Establishment : SHANUHANPUR ROAD BAREILLY BAREILLY 243001

Date of joining of the Establishment : 01-07-2009

PF Account held by EPFO Office : BAREILLY

Member's Name : BASANT SHARMA

Father's/Spouse Name : GANGA SARAN SHARMA Relationship : FATHER

Claim attestation through : Previous Establishment

[To change application data, click here.](#)

FZQKTO

✔ Please type the characters shown in the text box (case-sensitive)

GET PIN Click the button to get **Authorization PIN** on your registered Mobile number.

As member's declaration: I declare that all the details filled by me in the above application is true to the best of my knowledge. I also declare that both accounts are my accounts.

I understand that my mobile no. will be recorded and misuse of any mis-use of the facility or filing for any fraudulent claim my detail may be handed over to the appropriate authority for legal action.

☐ I Agree

Enter Authorization Pin:

Please type the characters shown in the text box and click on “GET PIN”. The member has to agree to the declaration mentioned in the form by clicking the select button “I Agree”. The PIN received on the registered mobile is to be entered and thereafter the online claim application can be submitted.

The following message would appear on the screen.

Name of the Estal
Address of the Estal
Date of joining of the Estal
PF Account held by EP
Member
Father's/Spouse Name : GANGA SARAN SHARMA Relationship : FATHER

Claim attestation through : Previous Establishment

[To change application data, click here.](#)

FZQKTO

✔ Please type the characters shown in the text box (case-sensitive) FZQKTO

GET PIN PIN is not received within 5 minutes, please verify your mobile number.
PIN not transmitted to your mobile number.

As member's declaration: I declare that all the details filled by me in the above application is true to the best of my knowledge. I also declare that both accounts are my accounts.

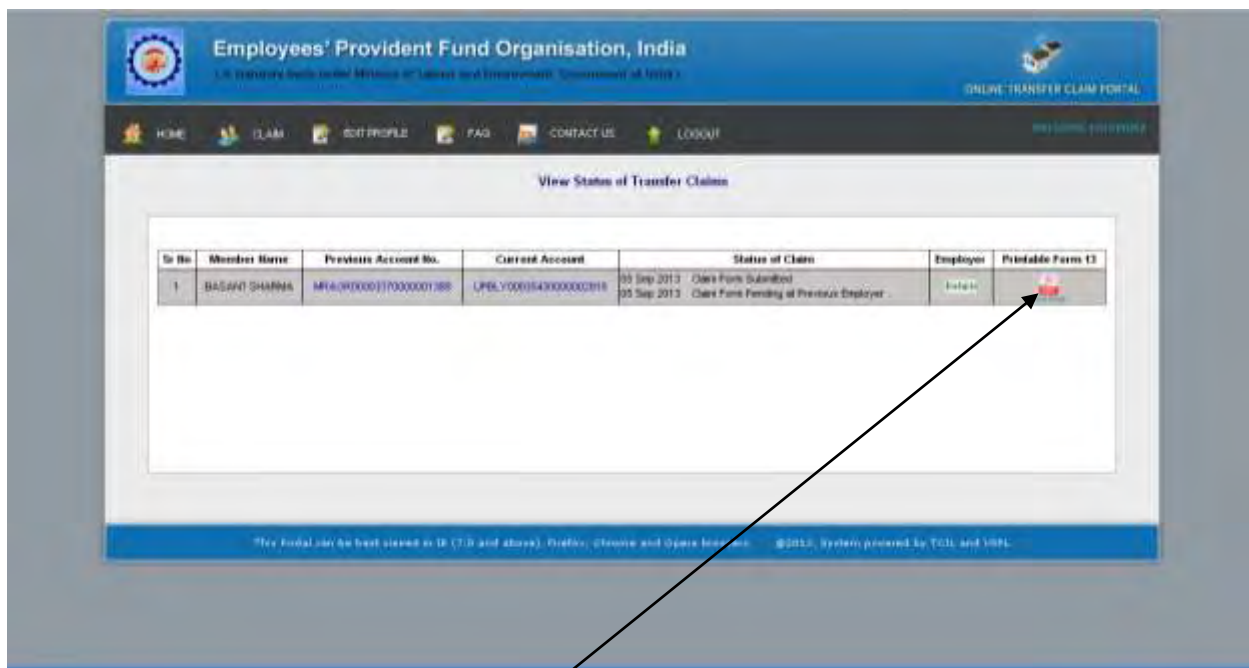
I understand that my mobile no. will be recorded and misuse of any mis-use of the facility or filing for any fraudulent claim my detail may be handed over to the appropriate authority for legal action.

☒ I Agree

Enter Authorization Pin:

This Portal can be best viewed in IE (7.5 and above), Firefox, Chrome and Opera Browsers. ©2011. System powered by TCSL and MSP.

The member has to click “OK” to proceed further. This would lead to the following screen.



The printable Transfer Claim Form (Form-13) can be saved in the system. The member has to take a printout of the printable PDF file of Form 13, sign it and submit it to the employer chosen by the member to complete the process of claim submission by the member.

IMPORTANT: It is reiterated that the member details available in the process flow have been entered only for the testing of the application and has been reproduced for demonstration purpose only