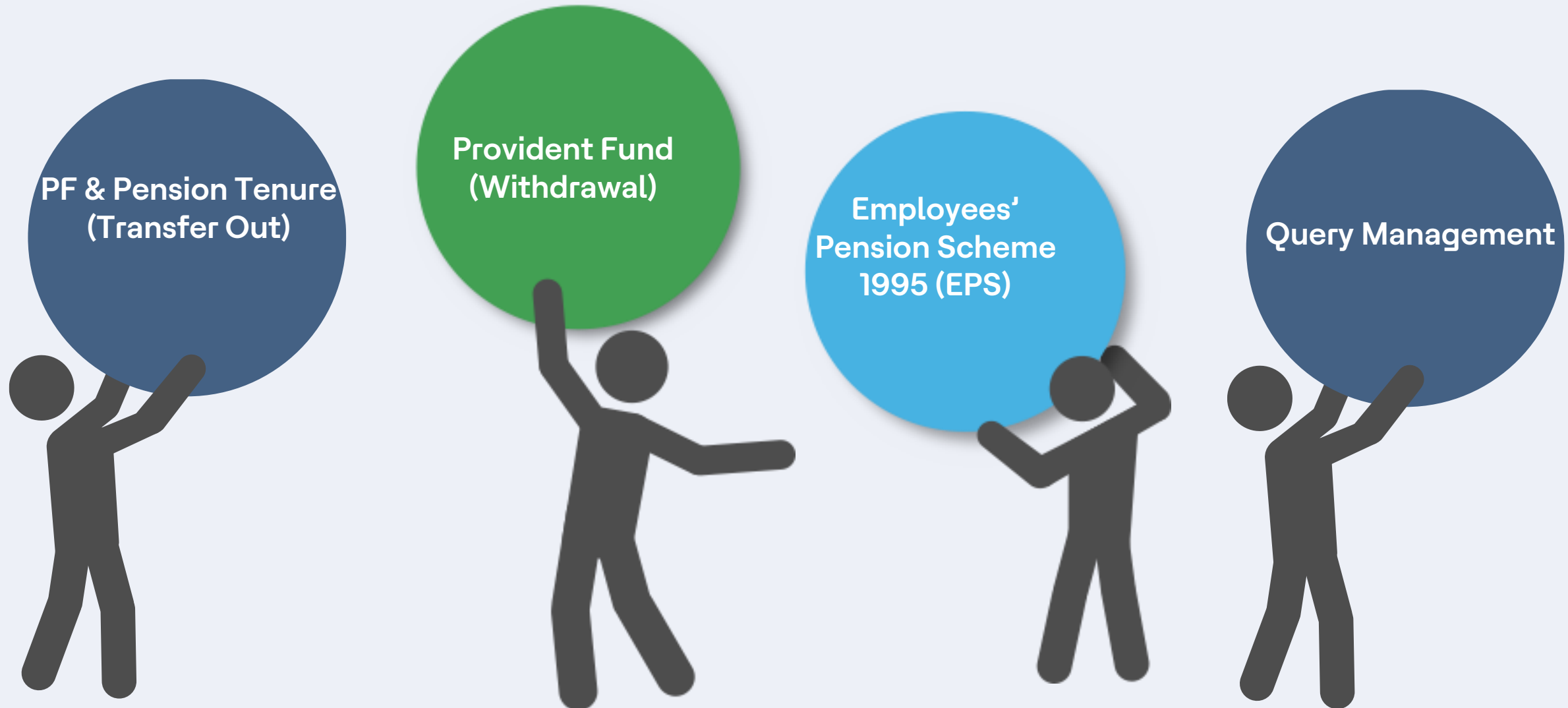


## Employee Exit Process - Provident Fund & Pension



# Schemes offered under EPFO



# Provident Fund & EPS Transfer-Out Application Procedure

# Provident Fund Transfer Out Application Procedure

**01**

Arrange Pre-Requisite  
for PF Transfer

**02**

Login into HCL's  
Offboarding Portal and  
click on PF Portal Link

**03**

ESS Facto HR Auto  
Login facility

**04**

Click on Transactions  
and choose Transfer  
Out Application Option

**05**

Fill-in current  
employers' details

**06**

Attach copy of form 13  
and submit the  
application

Kindly refer to the attached full procedure of application -

# Provident Fund Transfer Out Application Procedure

## Form 13 generation procedure on EPFO Portal

1

Step 1: Log in to the EPFO website using your Universal Account Number (UAN) and the password. Step 2: Under the "Online Services" tab, select "One Member - One EPF Account (Transfer Request)". Detailed procedure has been explained in the next slides.

2

Download the form 13 from EPFO portal and follow below steps to upload the form on HCL portal to transfer the fund.

# EPFO Login for Employees – Generate form 13

Go to the [EPFO Unified Login portal](https://unifiedportal-mem.epfindia.gov.in/memberinterface/) / open below Link  
<https://unifiedportal-mem.epfindia.gov.in/memberinterface/>



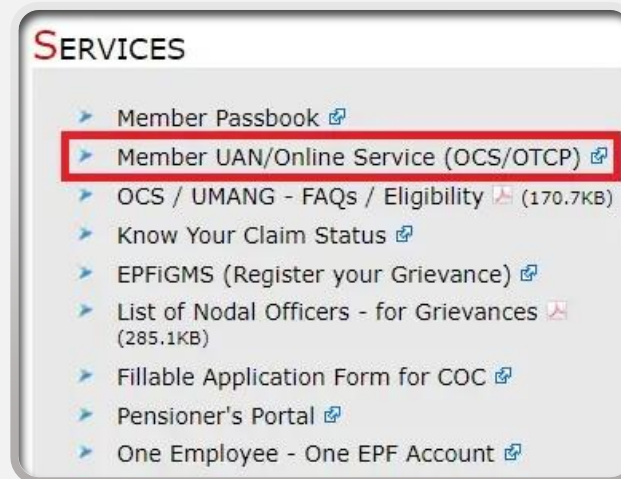
Under 'Services' section, click on 'For Employees'.



As the new dashboard opens up, go to Member UAN/Online Services (in the 'Services' section). You can also go directly to the EPFO Member Portal/e-SEWA Portal.



Now login using UAN which is possible if you have an activated UAN (Universal Account Number). Below the 'login' section, there's also an option to activate UAN. In case you have not activated it, click on 'Activate UAN'



# Form 13 (PF Transfer out) Generation Procedure



Post login, click on Online Services and then  
ONE MEMEBR – ONE EPF ACCOUNT  
(TRANSFER REQUEST)



Entre Current PF Number, Select current employer and enter member id / UAN id and click on Get Details...

# Form 13 (PF Transfer out) Generation Procedure



Click on Get OTP, Enter OTP and submit.

Post submit it, download the application form and follow the procedures explained on next slides to upload the form on HCL PF Portal.

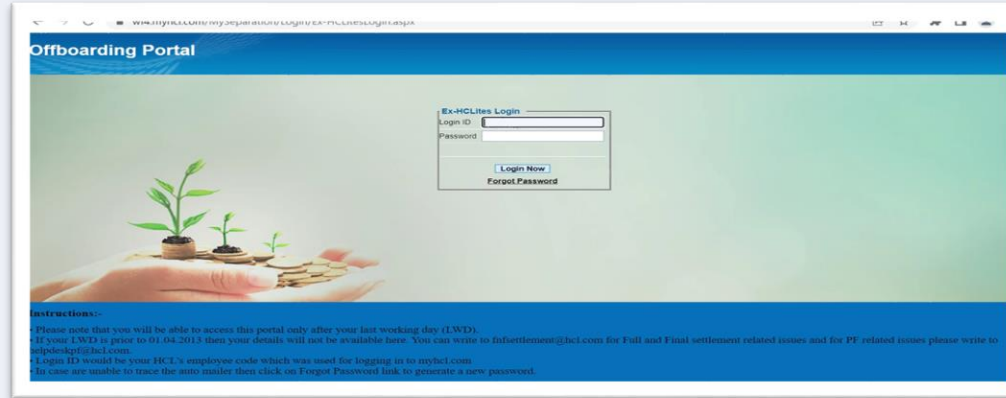
The screenshot displays the HCL PF Portal interface for generating Form 13. The top navigation bar includes links for Home, View, Manage, Account, and Online Services. Below the navigation bar, there is a section for "Attestation through" with radio buttons for "Previous Employer" and "Present Employer". A note states: "To generate Member ID in required format, click Get MID". Below this, there is a field for "Member ID / UAN : \*" with a placeholder "Enter MID/UAN" and buttons for "Get Details" and "Reset".

The main content area is titled "Step 2 : Authenticate OTP & Submit". It includes a note: "Note : OTP will be sent on AADHAAR linked mobile number." Below the note, there is a checkbox with the text: "मैं अपनी पहचान स्थापित करने और ऑनलाइन दावा प्रस्तुत करने के उद्देश्य से आधार आधारित प्रमाणीकरण के लिए अपना आधार नंबर, बायोमेट्रिक और/या वन I hereby consent to provide my Aadhaar Number One Time Pin (OTP) data for Aadhaar based authentication for the purpose of establishing m". At the bottom, there are three buttons: "Get OTP", "Enter OTP", and "Submit".



# Offboarding Login Procedure

**Step 1:** Please visit separation portal through this link <https://wf4.myhcl.com/MySeparation/Login/Ex-HCLitesLogin.aspx>. (Separation portal will open as provided below in screenshot)



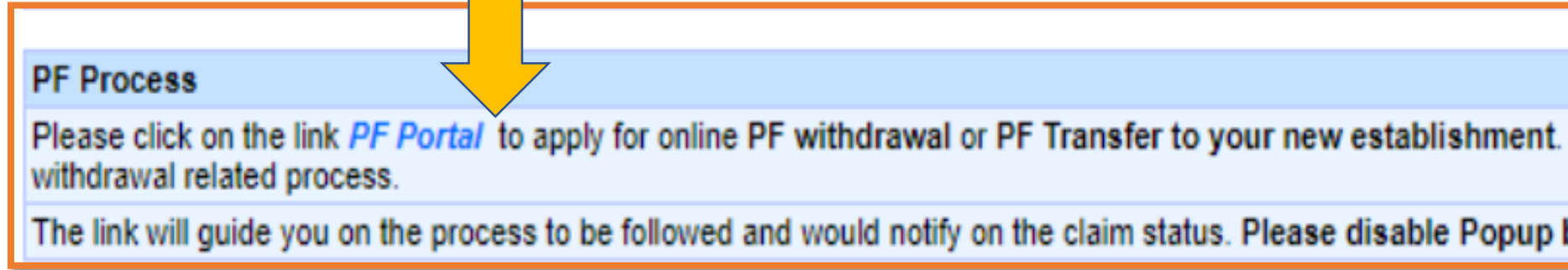
**Login Id /Password:** Please enter your SAP id and password, an OTP will be triggered to the Personal Email Id (OTP is valid for 10 minutes only). Please check spam folder in case OTP is not received in the INBOX.

**Forgot Password:** Please enter SAP id / Employee id and click on Get Details button, and then enter PAN No. or Date of Birth, temporary password will be sent to the personal email id, this password will be valid only for 30 minutes. **Employee is requested to change his password using temporary password.**

Challenge in login to the portal, please send an email @ [portal.login.issue@hcl.com](mailto:portal.login.issue@hcl.com) along with error screenshot.

# Provident Fund Transfer Out Application Procedure

**Step 2** : Please click on the PF Portal link mentioned below on the next page as shown in the screenshot.



## **Note: If above link is not opening**

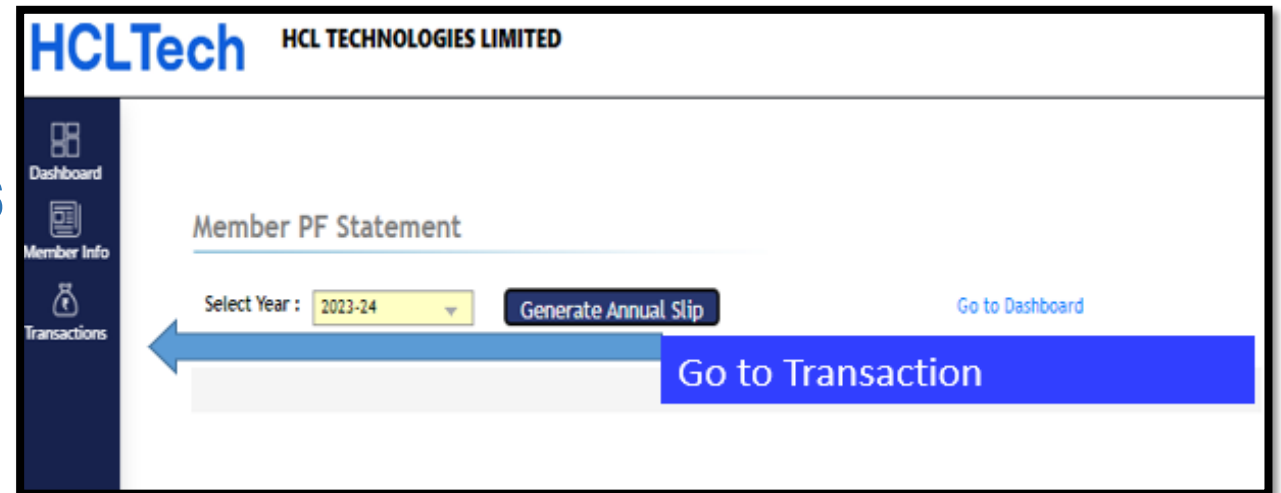
Please try accessing portal in browser's Incognito/InPrivate window, After left click (direct select) PF portal link, kindly check URL right side and disable popup blocker (choose Allow for site option)

# Provident Fund Transfer Out Application Procedure

## Step 3: Wait for Auto Login

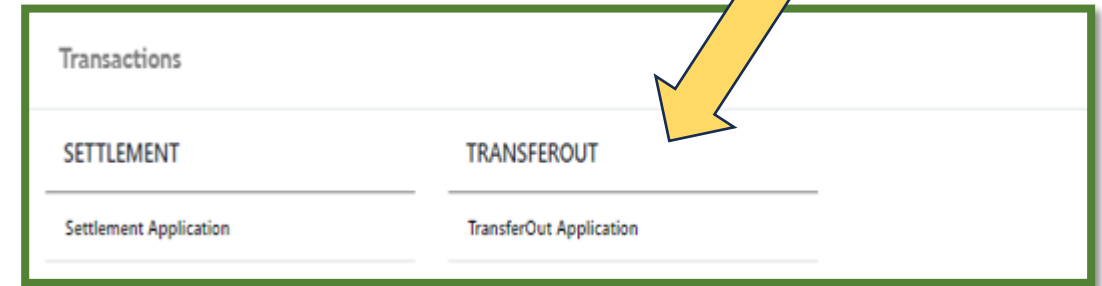


## Step 3.1 : Click on Transactions



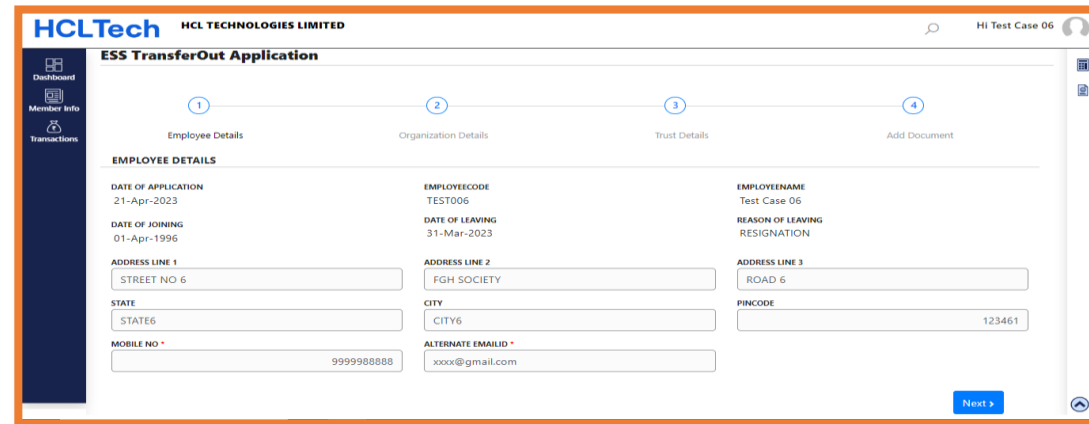
# Provident Fund Transfer Out Application Procedure

**Step 3.2** Click on Transfer Out Application



Transactions	
SETTLEMENT	TRANSFEROUT
Settlement Application	TransferOut Application

**Step 3.3** Verify your basic details here and Click on Next



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HI Test Case 06

**ESS TransferOut Application**

1 Employee Details 2 Organization Details 3 Trust Details 4 Add Document

**EMPLOYEE DETAILS**

DATE OF APPLICATION 21-Apr-2023	EMPLOYEECODE TEST006	EMPLOYEENAME Test Case 06
DATE OF JOINING 01-Apr-1996	DATE OF LEAVING 31-Mar-2023	REASON OF LEAVING RESIGNATION
ADDRESS LINE 1 STREET NO 6	ADDRESS LINE 2 FGH SOCIETY	ADDRESS LINE 3 ROAD 6
STATE STATE6	CITY CITY6	PINCODE 123461
MOBILE NO * 9999988888	ALTERNATE EMAILID * xxxx@gmail.com	

Next >

# Provident Fund Transfer Out Application Procedure

## Step 3.4 Fill the details and next

✓

2

3

4

Employee DetailsPRESENT TRUST / RPFC DETAILSPRESENT ORGANIZATION DETAILSAdd Document

PRESENT TRUST / RPFC DETAILS

TRUST TYPE \*

-----Select-----

TRUST NAME \*

--Select--

TRUST EMAILID

Trust EmailID

TRUST ADDRESS LINE 1

Address Line 1

TRUST ADDRESS LINE 2

Address Line 2

TRUST ADDRESS LINE 3

Address Line 3

TRUST STATE

State

TRUST CITY

City

TRUST PINCODE

PinCode

BENE. BANK ACCOUNT NO \*

Bene. Bank Acc No

BENE. BANK NAME \*

Bene. Bank Name

IFSC CODE \*

IFSC Code

PF ACCOUNT NO. 

PF ACCOUNT NO.

UAN NO

UAN NO

EPS NO

EPS NO

(Note for PF A/C No : Refer form 13, Part C.  
PF No is a combination of Alphabet & Numeric  
e.g. ABCDE00000000000000000000)

Previous

Next

✓

✓

3

4

Employee DetailsPRESENT TRUST / RPFC DETAILSPRESENT ORGANIZATION DETAILSAdd Document

PRESENT ORGANIZATION DETAILS

ESTABLISHMENT CODE \*

-

COMPANY NAME \*

Company Name

ADDRESS LINE 1

Address Line 1

ADDRESS LINE 2

Address Line 2

ADDRESS LINE 3

Address Line 3

STATE

State

CITY

City

PINCODE

Pincode

Previous

Next

NOTE : Voice PF Helpdesk Support  
India : 0008000403933  
US : 18556641988  
UK : 08000489162  
Timing: 10 am to 5 pm

## Step 3.5 Fill the details and next

# Provident Fund Transfer Out Application Procedure

## Step 3.6 Choose form 13 and Upload

Dashboard

Member Info

Transactions

HCLTech

HCL TECHNOLOGIES LIMITED

Hi Test Case 06

ESS TransferOut Application

✓

✓

✓

4

Employee Details

Organization Details

Trust Details

Add Document

ADD DOCUMENT

DOCUMENT NAME	STATUS	UPLOAD DOCUMENT
FORM 13	MANDATORY	<div>Choose fileBrowseUpload</div>

NOTE : NONE

Previous

Submit

Dashboard

Member Info

Transactions

HCLTech

HCL TECHNOLOGIES LIMITED

Application added successfully.

ESS TransferOut Application

21-Apr-2023

APPLIED

PROCESSED DATE	DATE OF LEAVING	REASON OF LEAVING	LAST ACTION BY	LAST ACTION ON
	31-Mar-2023	RESIGNATION	TEST006	21-Apr-2023

## Step 3.7 Application Created successfully

# Provident Fund Withdrawal Application Procedure

# Provident Fund Withdrawal Application Procedure

**01**

Login into HCL's Offboarding Portal and click on PF Portal Link

**02**

ESS Facto HR Auto Login Facility Available

**03**

Click on Transactions and choose Settlement Application Option

**04**

Choose Bank Account Type and fill in the details

**05**

Generate the form 19 & Form 15G/H and take the print for signature

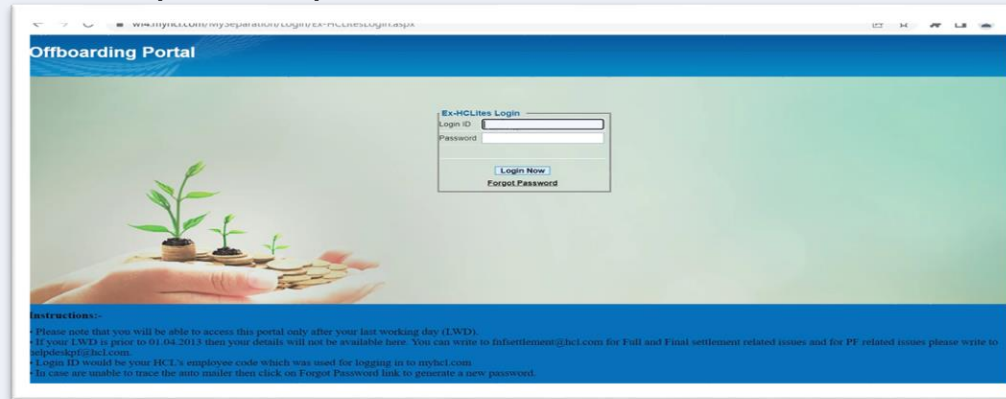
**06**

Upload signed forms and other documents e.g. Copy of Aadhar, Pan & Bank proof.



# Offboarding Login Procedure

**Step 1:** Please visit separation portal through this link <https://wf4.myhcl.com/MySeparation/Login/Ex-HCLitesLogin.aspx>. (Separation portal will open as provided below in screenshot)



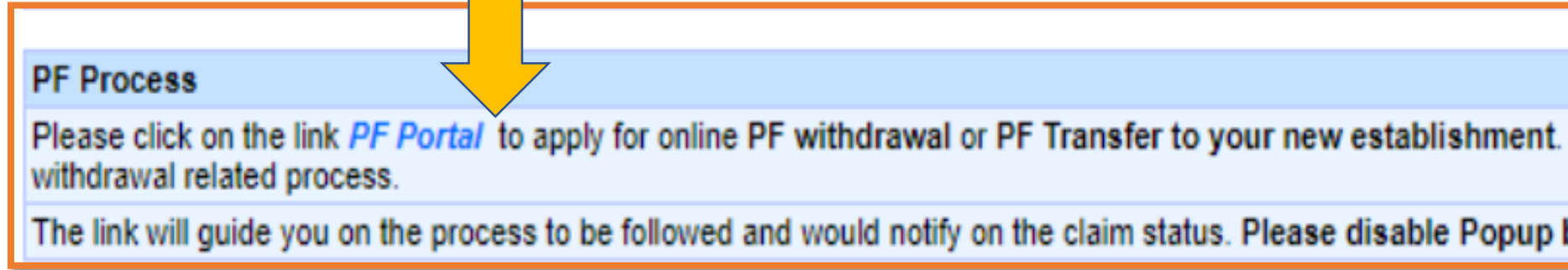
**Login Id /Password:** Please enter your SAP id and password, an OTP will be triggered to the Personal Email Id (OTP is valid for 10 minutes only). Please check spam folder in case OTP is not received in the INBOX.

**Forgot Password:** Please enter SAP id / Employee id and click on Get Details button, and then enter PAN No. or Date of Birth, temporary password will be sent to the personal email id, this password will be valid only for 30 minutes. **Employee is requested to change his password using temporary password.**

Challenge in login to the portal, please send an email @ [portal.login.issue@hcl.com](mailto:portal.login.issue@hcl.com) along with error screenshot.

# Provident Fund Withdrawal Application Procedure

**Step 2** : Please click on the PF Portal link mentioned below on the next page as shown in the screenshot.



## **Note: If above link is not opening**

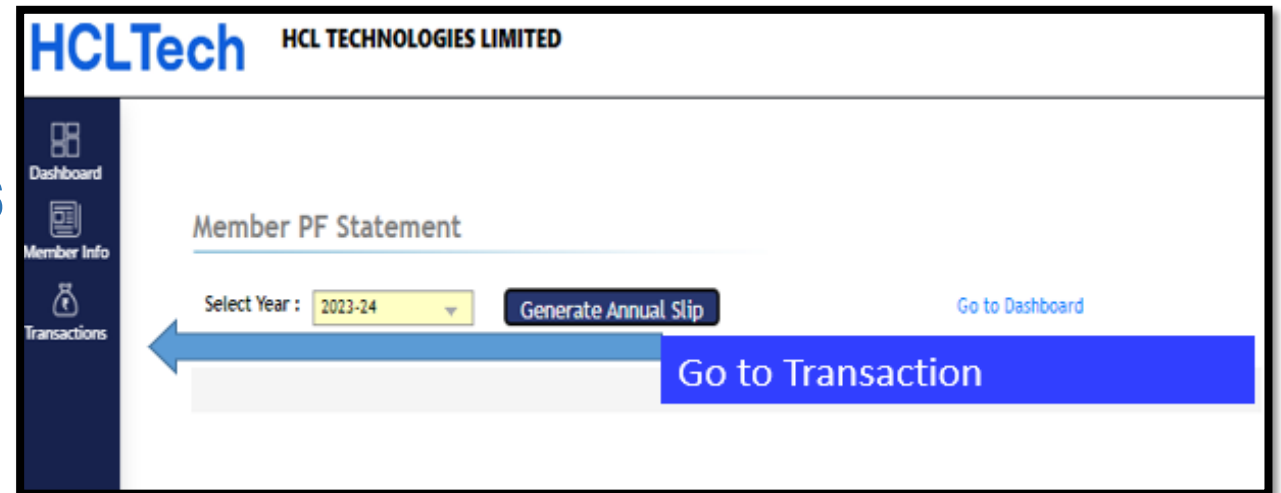
Please try accessing portal in browser's Incognito/InPrivate window, After left click (direct select) PF portal link, kindly check URL right side and disable popup blocker (choose Allow for site option)

# Provident Fund Withdrawal Application Procedure

## Step 3: Wait for Auto Login

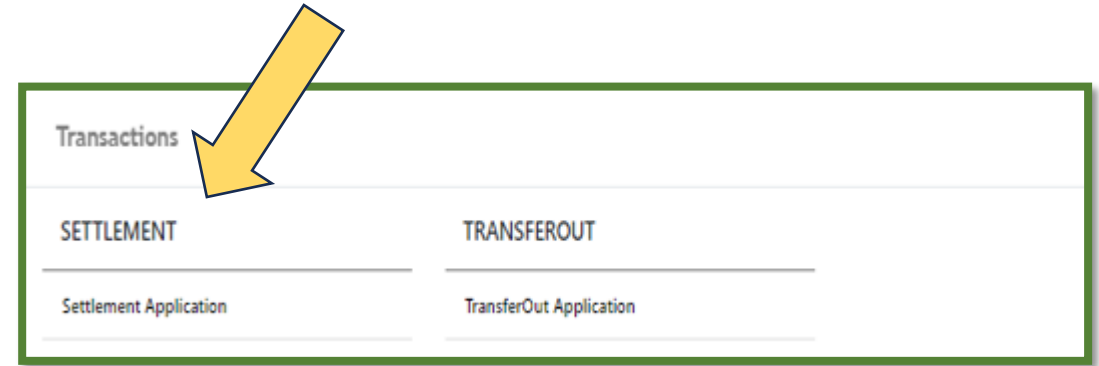


## Step 3.1 : Click on Transactions



# Provident Fund Withdrawal Application Procedure

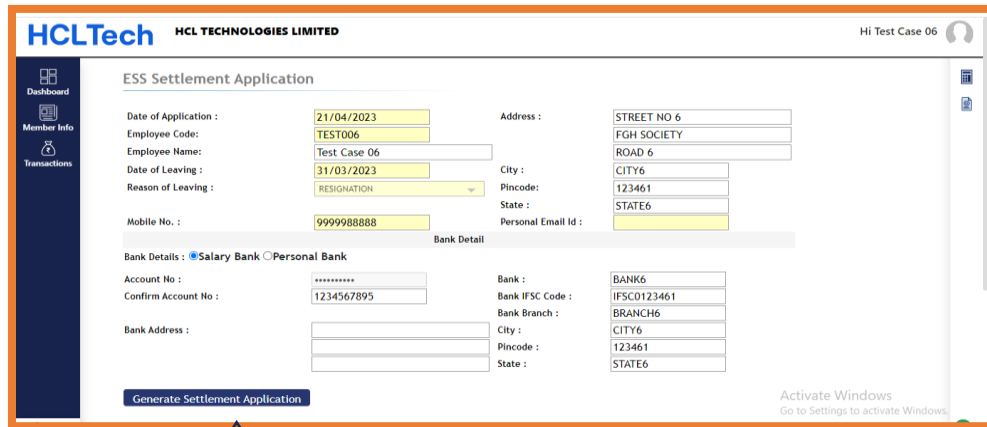
## Step 3.2 Click on Settlement Application



Transactions	
SETTLEMENT	TRANSFEROUT
Settlement Application	TransferOut Application

## Step 3.3 Choose bank account and Fill the details and click on form 19 and form 15g/h to download the form.

Please do manual sign on generated forms and scan them to upload



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**ESS Settlement Application**

Date of Application : 21/04/2023  
Employee Code: TEST006  
Employee Name: Test Case 06  
Date of Leaving : 31/03/2023  
Reason of Leaving : RESIGNATION  
Mobile No. : 9999988888

Address : STREET NO 6  
FGH SOCIETY  
ROAD 6  
CITY6  
123461  
STATE6

Bank Details : ☒ Salary Bank ☐ Personal Bank

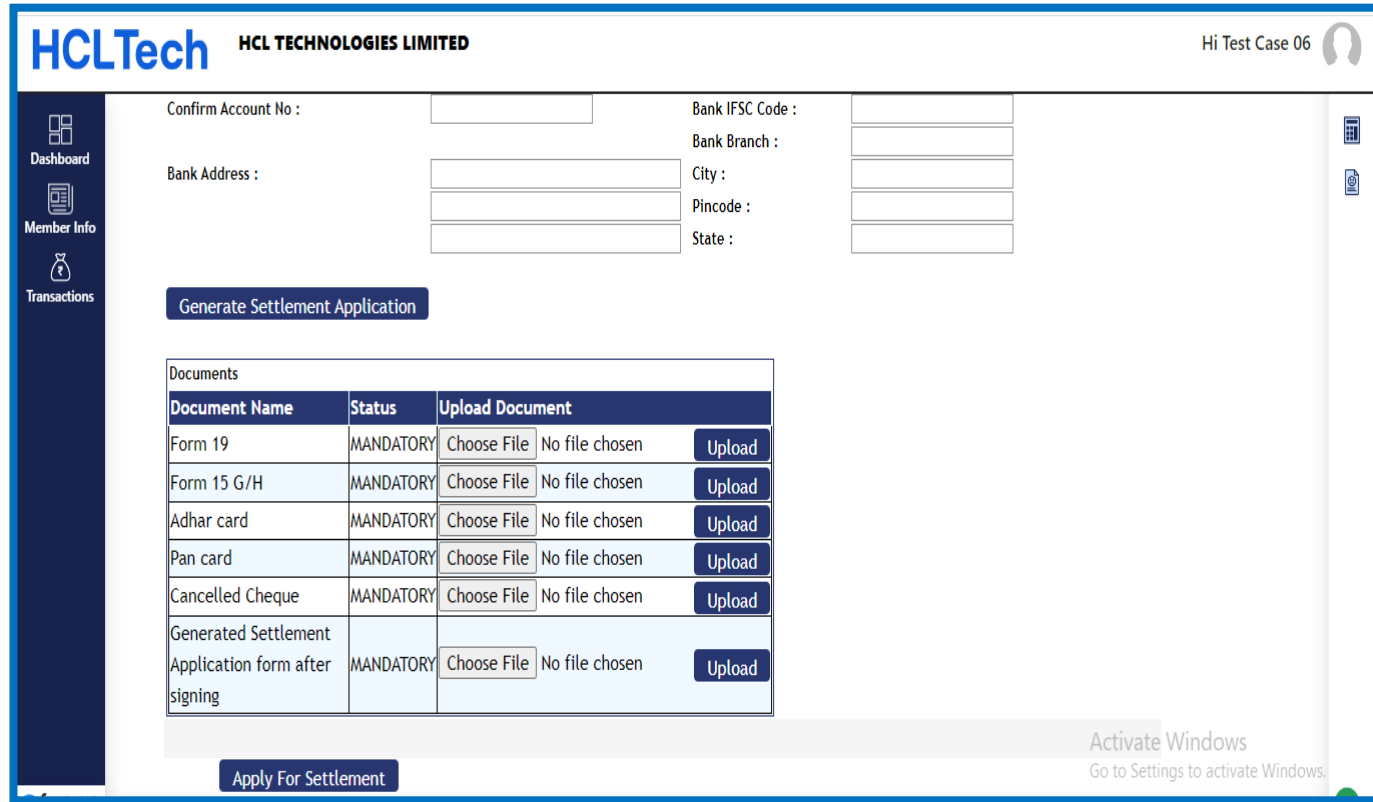
Account No : \*\*\*\*\*  
Confirm Account No : 1234567895  
Bank Address :  
City :  
State :  
Pincode :  
Bank : BANK6  
Bank IFSC Code : IFSC0123461  
Bank Branch : BRANCH6  
City : CITY6  
Pincode : 123461  
State : STATE6

[Generate Settlement Application](#)

Activate Windows  
Go to Settings to activate Windows.

Click here to generate Settlement Application

# Provident Fund Withdrawal Application Procedure



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Confirm Account No :  Bank IFSC Code :   
Bank Address :  Bank Branch :   
City :  Pincode :   
State :

[Generate Settlement Application](#)

Document Name	Status	Upload Document
Form 19	MANDATORY	<input type="button" value="Choose File"/> No file chosen <input type="button" value="Upload"/>
Form 15 G/H	MANDATORY	<input type="button" value="Choose File"/> No file chosen <input type="button" value="Upload"/>
Adhar card	MANDATORY	<input type="button" value="Choose File"/> No file chosen <input type="button" value="Upload"/>
Pan card	MANDATORY	<input type="button" value="Choose File"/> No file chosen <input type="button" value="Upload"/>
Cancelled Cheque	MANDATORY	<input type="button" value="Choose File"/> No file chosen <input type="button" value="Upload"/>
Generated Settlement Application form after signing	MANDATORY	<input type="button" value="Choose File"/> No file chosen <input type="button" value="Upload"/>

[Apply For Settlement](#)

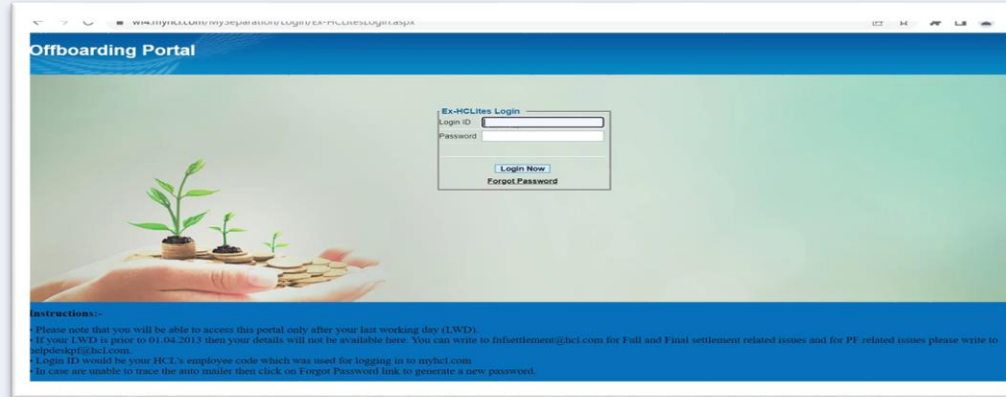
Activate Windows  
Go to Settings to activate Windows.

**Step 3.4** Choose File & Upload documents one by one and then click on Apply for settlement

**Online Grievance & Query Mgmt.  
and  
Voice Call helpdesk**

# Offboarding Login Procedure

**Step 1:** Please visit separation portal through this link <https://wf4.myhcl.com/MySeparation/Login/Ex-HCLitesLogin.aspx>. (Separation portal will open as provided below in screenshot)



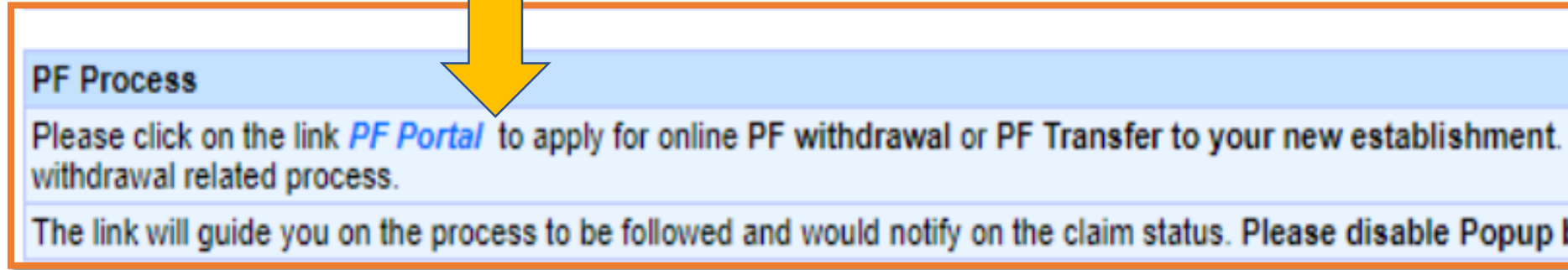
**Login Id /Password:** Please enter your SAP id and password, an OTP will be triggered to the Personal Email Id (OTP is valid for 10 minutes only). Please check spam folder in case OTP is not received in the INBOX.

**Forgot Password:** Please enter SAP id / Employee id and click on Get Details button, and then enter PAN No. or Date of Birth, temporary password will be sent to the personal email id, this password will be valid only for 30 minutes. **Employee is requested to change his password using temporary password.**

Challenge in login to the portal, please send an email @ [portal.login.issue@hcl.com](mailto:portal.login.issue@hcl.com) along with error screenshot.

# Online Grievance Portal

**Step 2** : Please click on the **PF Portal** link mentioned below on the next page as shown in the screenshot.



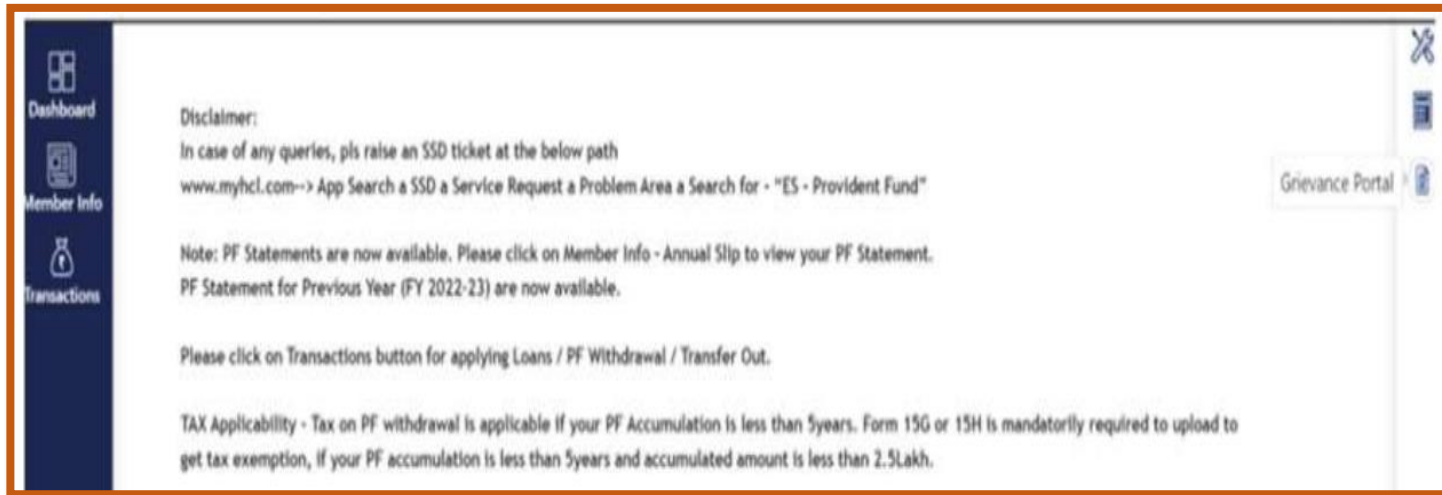
## **Note: If above link is not opening**

Please try accessing portal in browser's Incognito/InPrivate window, After left click (direct select) PF portal link, kindly check URL right side and disable popup blocker (choose Allow for site option)



# Online Grievance Portal

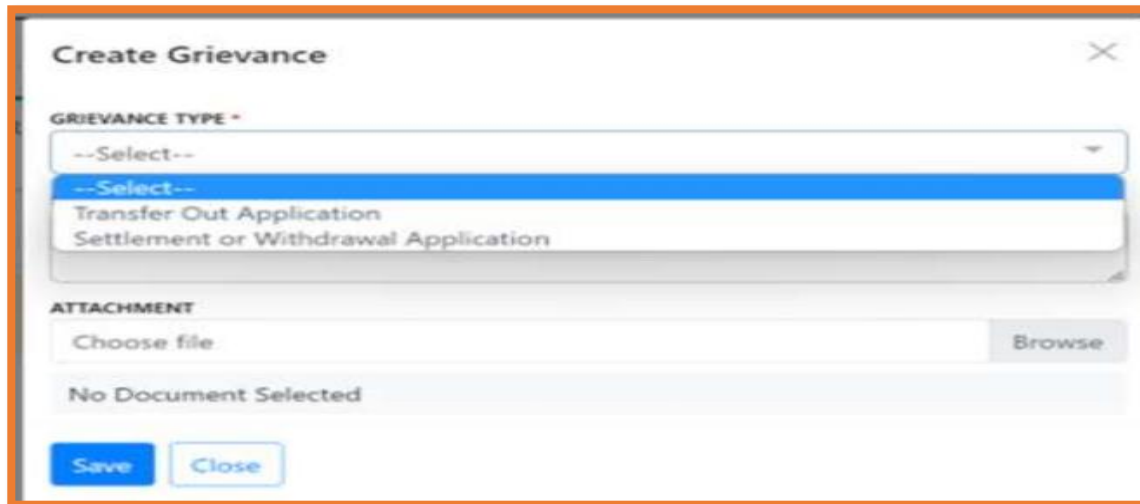
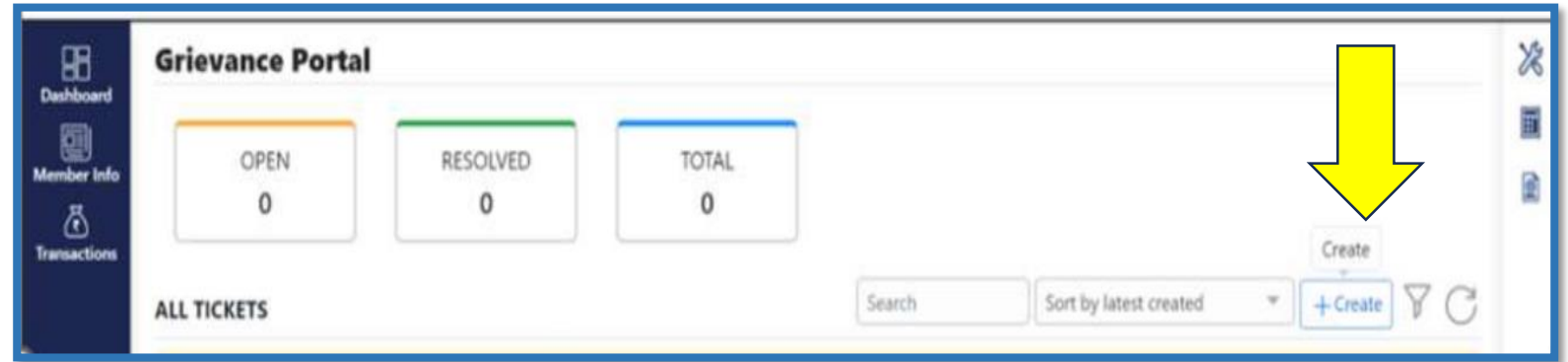
## Step 3: Wait for Auto Login



**Step 3.1 : Click on Grievance Portal link**

# Online Grievance Portal

## Step 3.2: Click on Create



The screenshot shows the 'Create Grievance' form. The 'GRIEVANCE TYPE' dropdown menu is open, showing options: '--Select--', 'Transfer Out Application', and 'Settlement or Withdrawal Application'. The 'ATTACHMENT' section has a 'Choose file' button and a 'Browse' button. Below this is a 'No Document Selected' message. At the bottom are 'Save' and 'Close' buttons.

**Step 3.1 : Select relevant option, attach doc and Save the query.**

# Voice Helpdesk Contact Details

Emp Category	Subject	Helpline Num	Zone	Call Timing	Days	IVR Option	Email ids/Grievance Portal	Query Response LSA	Login Issue - email
Inactive/left employee	Only PF Withdrawal/ Transfer out query	0008000403933	India	10 am to 5 pm	Monday to Friday	<b>Option 1</b> : Transfer out RPFC/Trust <b>Option 2</b> : PF Withdrawal	For ex employees :: <b>Separation Portal / PF Portal/ Click on Grievance icon</b> (available on right corner up on the portal)/ <b>Select Category and write your query.</b>	3 Working Days	<a href="mailto:Portal.Login.Issue@hcl.com">Portal.Login.Issue@hcl.com</a>
		18556641988	US						
		08000489162	UK						

Emp Category	Subject	Helpline Num		Call Timing (India)	Days	IVR Option	Email ids/Grievance Portal	Query Response LSA
Active / Inactive employee	Pension Query	0008000403888		2 pm to 5 pm	Monday to Friday	Pension Queries	<a href="mailto:pensionhelpdesk@hcl.com">pensionhelpdesk@hcl.com</a>	3 Working Days
	Aadhar Correction, UAN query, Name Correction etc.	7303883281		11 am to 5 pm	Monday to Friday	KYC Helpline / Query	<a href="mailto:hcl_pf.withdrawal@hcl.com">hcl_pf.withdrawal@hcl.com</a>	

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