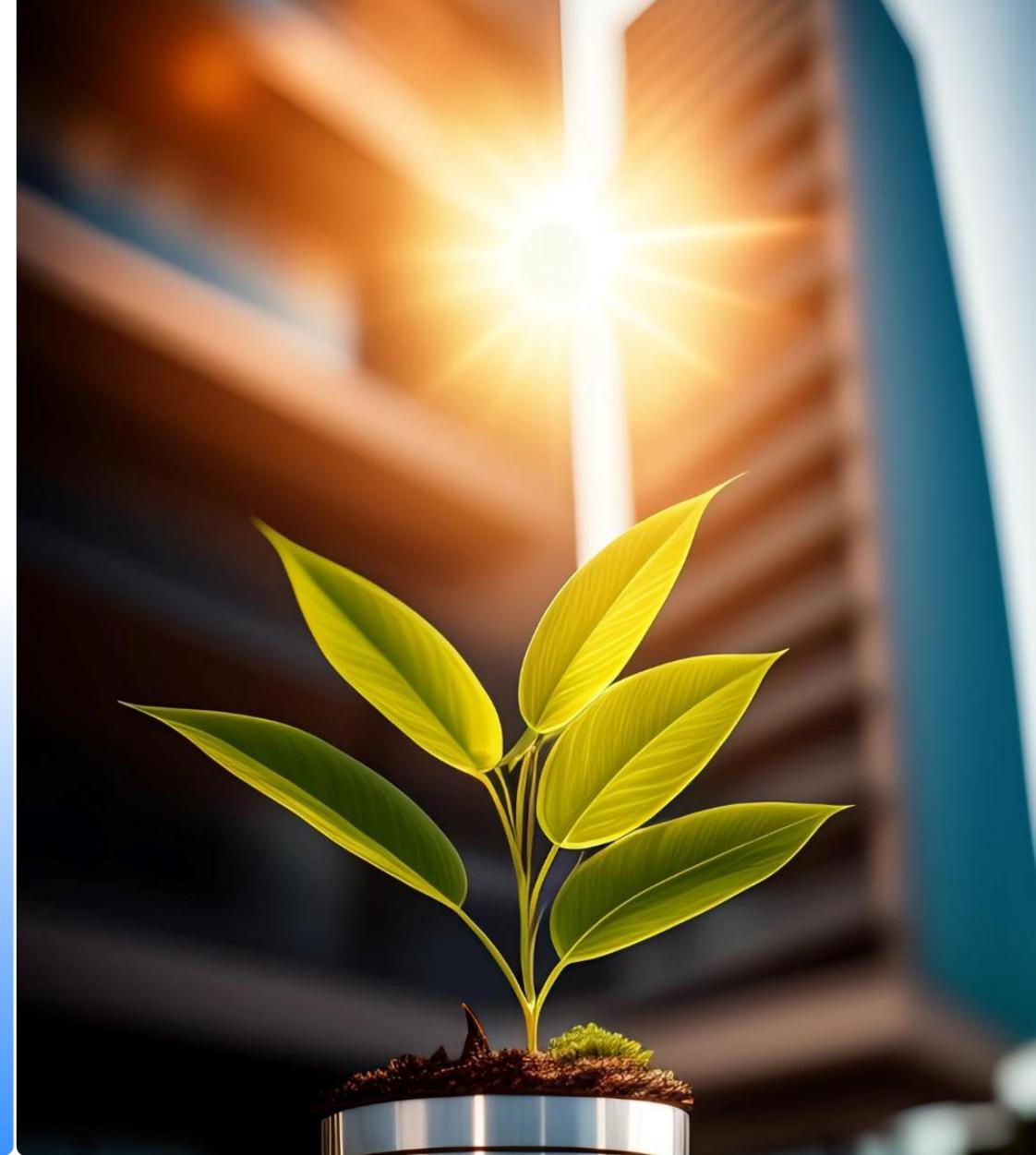
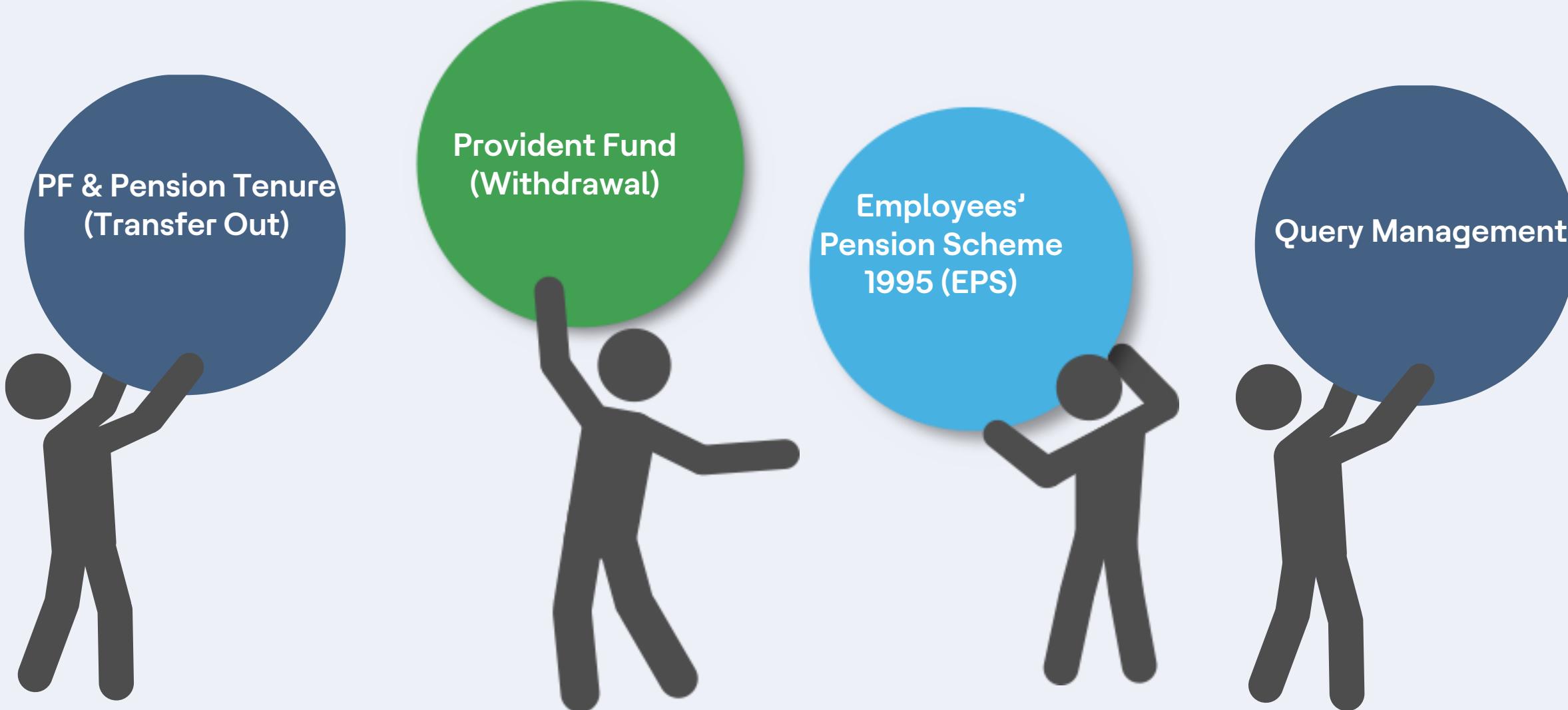


## **Employee Exit Process** **- Provident Fund & Pension**



# Schemes offered under EPFO



PF & Pension Tenure  
(Transfer Out)

Provident Fund  
(Withdrawal)

Employees'  
Pension Scheme  
1995 (EPS)

Query Management

# **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](#) / 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.

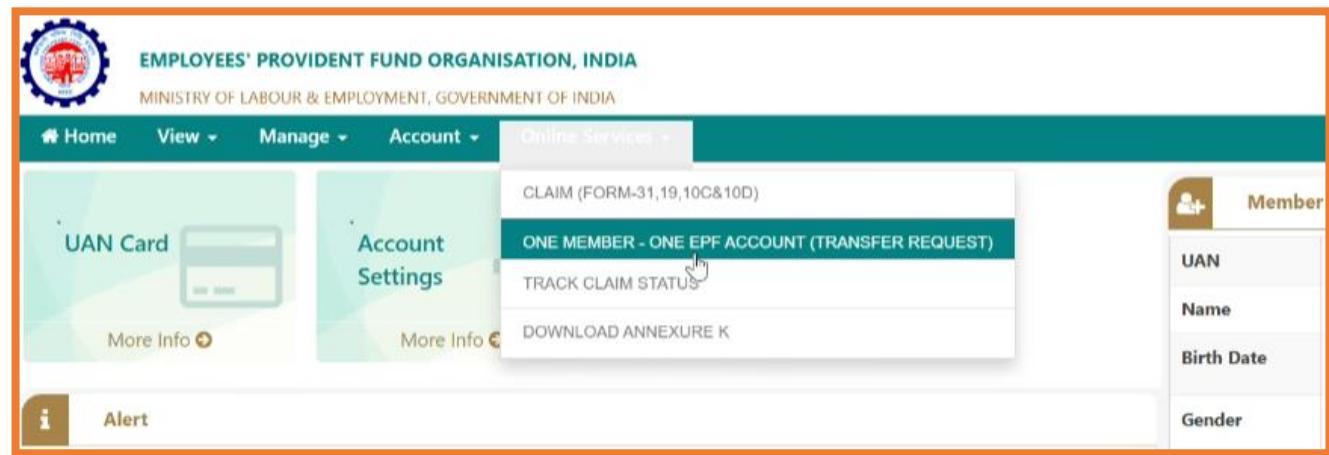


Now login using UAN which is possible if you have an activated UAN (Universal Account Number). Below the 'login' section, there's also an option to activate UAN. In case you have not activated it, click on 'Activate UAN'



# Form 13 (PF Transfer out) Generation Procedure

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



This screenshot shows the 'ONE MEMBER - ONE EPF ACCOUNT (TRANSFER REQUEST)' form. It consists of two main sections:

- Step 1 : Select details of previous accounts (which are to be transferred)**:  
Fields include Father/Spouse Name (LATE MR NARENDRA KUMAR AGARWAL), Relationship (FATHER), PF Account No.(Trust) (Enter PF Account number in :), Attestation through (radio buttons for Previous Employer or Present Employer), Member ID / UAN (Enter MID/UAN), and buttons for Get MID, Get Details, and Reset.
- Step 2 : Authenticate OTP & Submit**:  
Note: OTP will be sent on AADHAAR linked mobile number.



← Enter 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 shows the 'Step 2 : Authenticate OTP & Submit' section of the HCL PF Portal. At the top, there are navigation links for Home, View, Manage, Account, and Online Services. Below these are buttons for 'Get MID' and 'Reset'. A search bar labeled 'Member ID / UAN : \*' with placeholder text 'Enter MID/UAN' is present. To the right of the search bar are 'Get Details' and 'Reset' buttons. A note at the top right says 'to generate Member ID in required format, click Get MID'. The main area is titled 'Step 2 : Authenticate OTP & Submit'. It includes a note: 'Note : OTP will be sent on AADHAAR linked mobile number.' Below this is a checkbox statement in English and Hindi. The English statement reads: 'I hereby consent to provide my Aadhaar Number One Time Pin (OTP) data for Aadhaar based authentication for the purpose of establishing my PF account.' The Hindi statement is partially visible. At the bottom are three buttons: 'Get OTP' (disabled), 'Enter OTP' (disabled), and a green 'Submit' button.

# 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)



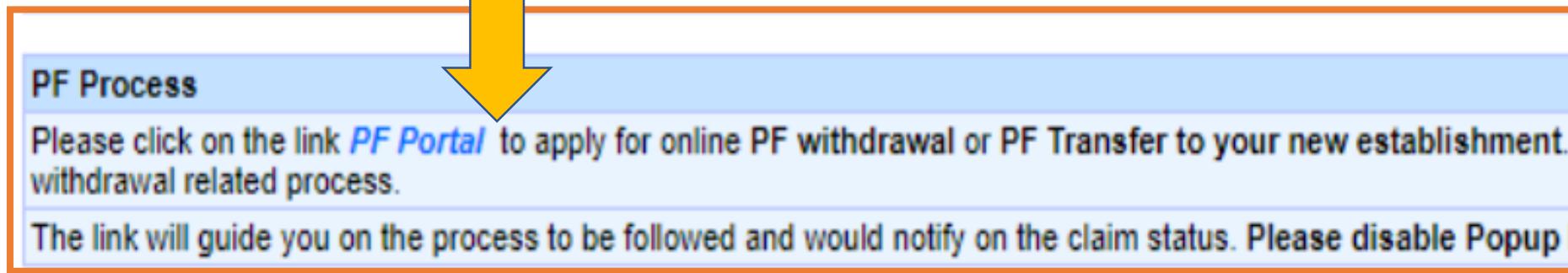
**Login Id /Password :** Please enter your SAP id and password, an OTP will be triggered to the Personal Email Id (OTP is valid for 10 minutes only). Please check spam folder in case OTP is not received in the INBOX.

**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**

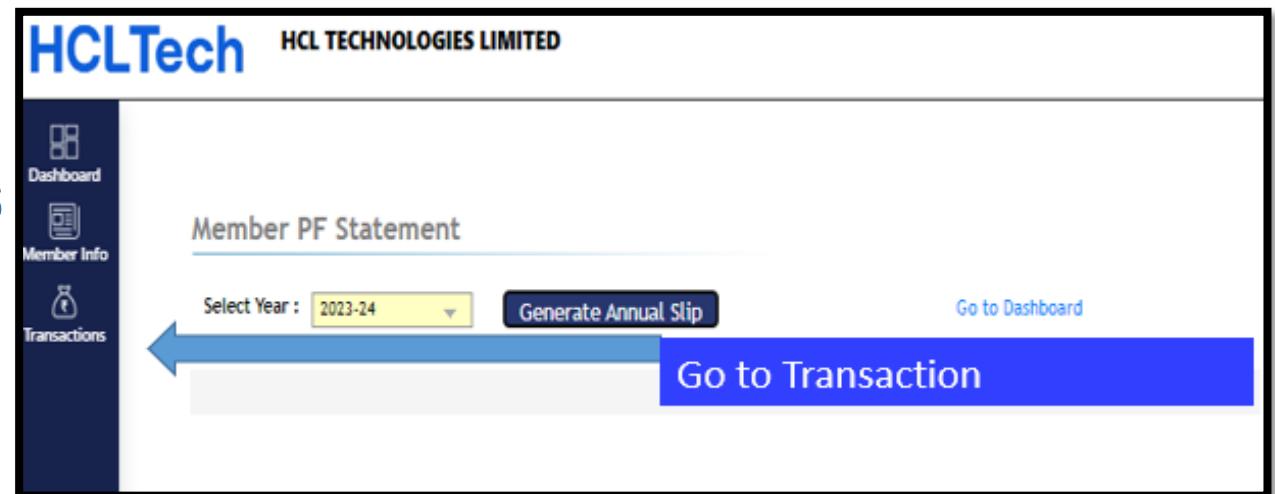
Please try accessing portal in browser's Incognito/InPrivate window, After left click (direct select) PF portal link, kindly check URL right side and disable popup blocker (choose Allow for site option)

# Provident Fund Transfer Out Application Procedure

## Step 3: Wait for Auto Login

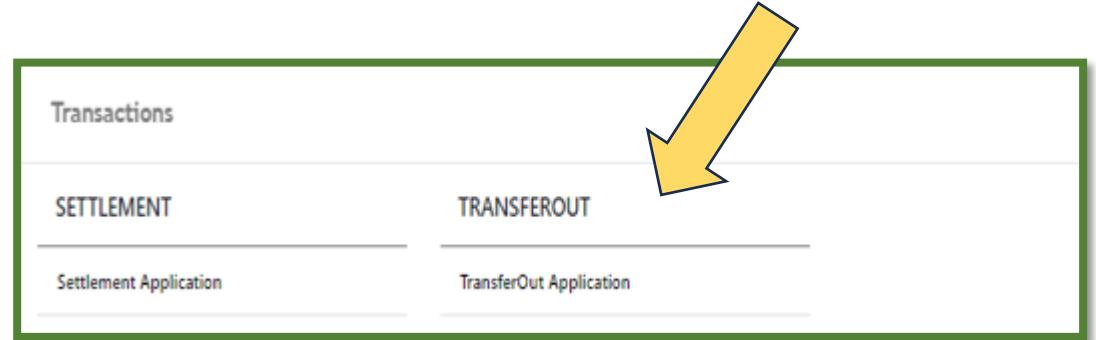


### Step 3.1: Click on Transactions



# Provident Fund Transfer Out Application Procedure

## Step 3.2 Click on Transfer Out Application



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

The screenshot shows the 'ESS TransferOut Application' page. On the left, a sidebar menu lists 'Dashboard', 'Member Info', and 'Transactions'. The main content area is titled 'ESS TransferOut Application' and is divided into four numbered steps: 1. Employee Details, 2. Organization Details, 3. Trust Details, and 4. Add Document. The 'Employee Details' step is currently active, displaying various input fields: DATE OF APPLICATION (21-Apr-2023), DATE OF JOINING (01-Apr-1996), ADDRESS LINE 1 (STREET NO 6), STATE (STATE6), MOBILE NO (9999988888), EMPLOYEECODE (TEST006), DATE OF LEAVING (31-Mar-2023), ADDRESS LINE 2 (FGH SOCIETY), CITY (CITY6), ALTERNATE EMAILID (xoxo@gmail.com), EMPLOYEE NAME (Test Case 06), REASON OF LEAVING (RESIGNATION), ADDRESS LINE 3 (ROAD 6), PINCODE (123461). A 'Next >' button is located at the bottom right of this section.

# Provident Fund Transfer Out Application Procedure

## Step 3.4 Fill the details and next

Employee Details PRESENT TRUST / RPFC DETAILS PRESENT ORGANIZATION DETAILS Add 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. (1) \* 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. ABCDE000000000000000000)

< Previous Next >

Employee Details PRESENT TRUST / RPFC DETAILS PRESENT ORGANIZATION DETAILS Add 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

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

< Previous Next >

## Step 3.5 Fill the details and next

# Provident Fund Transfer Out Application Procedure

## Step 3.6 Choose form 13 and Upload

The screenshot shows the 'ESS TransferOut Application' interface. At the top, there's a navigation bar with 'HCLTech HCL TECHNOLOGIES LIMITED' and a search bar. Below it, a progress bar indicates four steps: 'Employee Details', 'Organization Details', 'Trust Details', and 'Add Document', with the last step having a blue circle and the number '4'. On the left, a sidebar has 'Dashboard', 'Member Info', and 'Transactions' options. The main area is titled 'ESS TransferOut Application' and shows an 'ADD DOCUMENT' section. It lists 'DOCUMENT NAME' as 'FORM 13', 'STATUS' as 'MANDATORY', and provides 'UPLOAD DOCUMENT' fields with 'Choose file', 'Browse', and 'Upload' buttons. Below this, a note says 'NOTE: NONE'. At the bottom right are 'Previous' and 'Submit' buttons.

The screenshot shows the 'ESS TransferOut Application' interface. The left sidebar includes 'Dashboard', 'Member Info', and 'Transactions'. The main area displays application details: 'PROCESSED DATE' (21-Apr-2023), 'DATE OF LEAVING' (31-Mar-2023), 'REASON OF LEAVING' (RESIGNATION), 'LAST ACTION BY' (TEST006), and 'LAST ACTION ON' (21-Apr-2023). A green success message 'Application added successfully.' is visible at the top right. The word 'APPLIED' is highlighted in blue next to the processed date.

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)



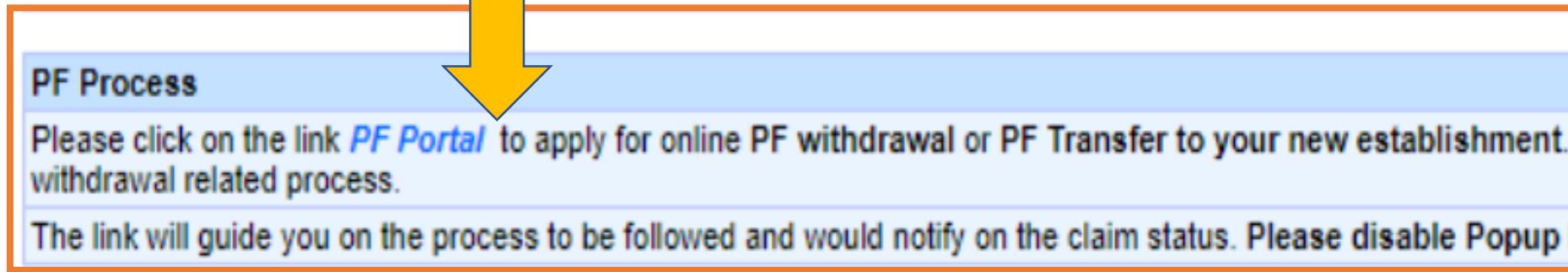
**Login Id /Password :** Please enter your SAP id and password, an OTP will be triggered to the Personal Email Id (OTP is valid for 10 minutes only). Please check spam folder in case OTP is not received in the INBOX.

**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**

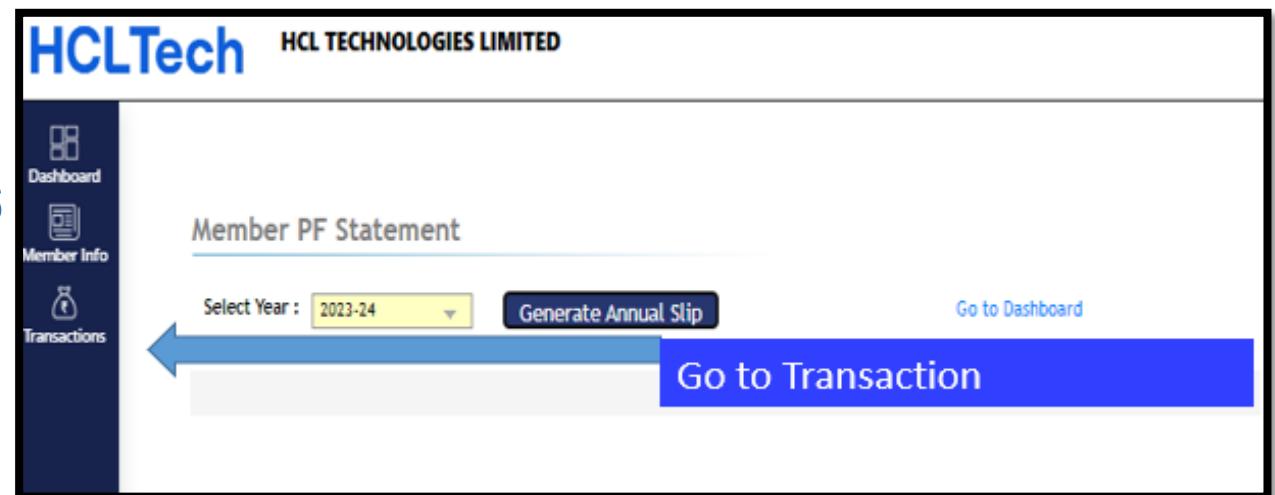
Please try accessing portal in browser's Incognito/InPrivate window, After left click (direct select) PF portal link, kindly check URL right side and disable popup blocker (choose Allow for site option)

# Provident Fund Withdrawal Application Procedure

## Step 3: Wait for Auto Login

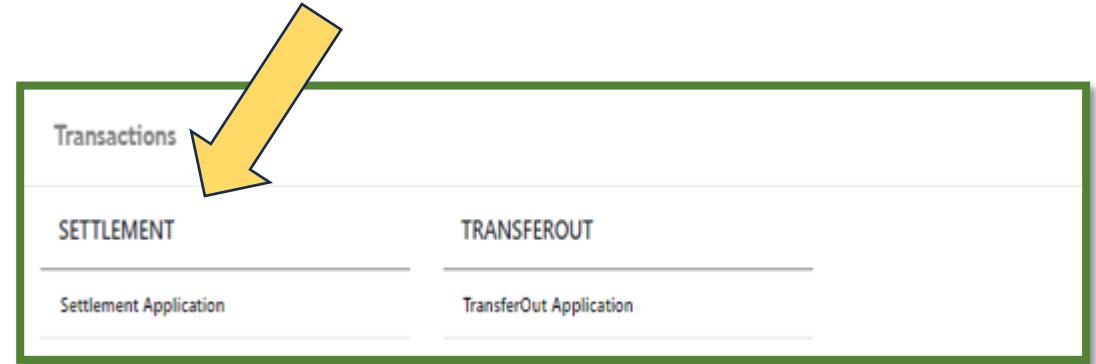


### Step 3.1: Click on Transactions



# Provident Fund Withdrawal Application Procedure

## Step 3.2 Click on Settlement Application



A screenshot of the 'ESS Settlement Application' form. The form includes fields for 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), City (CITY6), Pincode (123461), State (STATE6), Personal Email Id (Personal Email Id), Bank Details (Salary Bank selected), Account No (\*\*\*\*\*), Confirm Account No (1234567895), Bank (BANK6), Bank IFSC Code (IFSC0123461), Bank Branch (BRANCH6), City (CITY6), Pincode (123461), and State (STATE6). At the bottom, there is a 'Generate Settlement Application' button. A blue callout box with an orange arrow points to this button, containing the text 'Click here to generate Settlement Application'.

Click here to generate Settlement 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**

# Provident Fund Withdrawal Application Procedure

HCLTech HCL TECHNOLOGIES LIMITED

Hi Test Case 06

Confirm Account No :

Bank IFSC Code :

Bank Address :

Bank Branch :

City :

Pincode :

State :

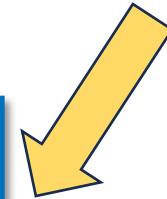
Generate Settlement Application

Documents

Document Name	Status	Upload Document	
Form 19	MANDATORY	Choose File	No file chosen
Form 15 G/H	MANDATORY	Choose File	No file chosen
Adhar card	MANDATORY	Choose File	No file chosen
Pan card	MANDATORY	Choose File	No file chosen
Cancelled Cheque	MANDATORY	Choose File	No file chosen
Generated Settlement Application form after signing	MANDATORY	Choose File	No file chosen

Activate Windows  
Go to Settings to activate Windows.

Apply For Settlement



**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)



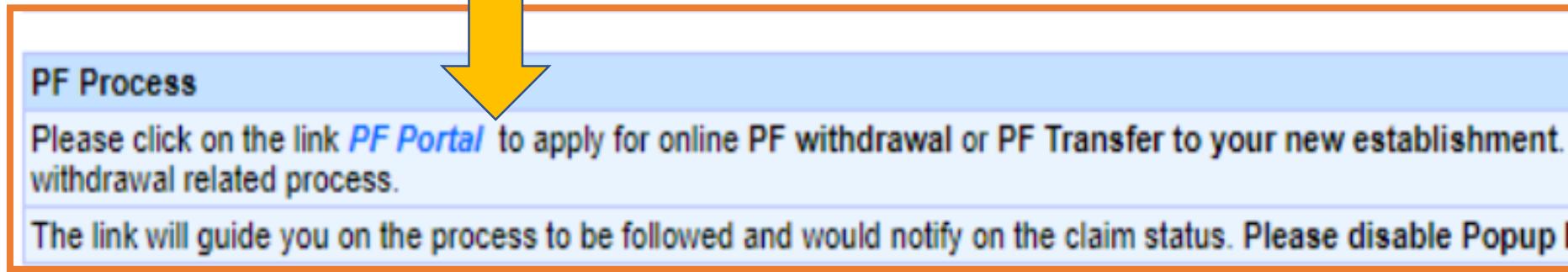
**Login Id /Password :** Please enter your SAP id and password, an OTP will be triggered to the Personal Email Id (OTP is valid for 10 minutes only). Please check spam folder in case OTP is not received in the INBOX.

**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



Disclaimer:  
In case of any queries, pls raise an SSD ticket at the below path  
[www.myhcl.com](http://www.myhcl.com)--> App Search a SSD a Service Request a Problem Area a Search for - "ES - Provident Fund"

Note: PF Statements are now available. Please click on Member Info - Annual Slip to view your PF Statement.  
PF Statement for Previous Year (FY 2022-23) are now available.

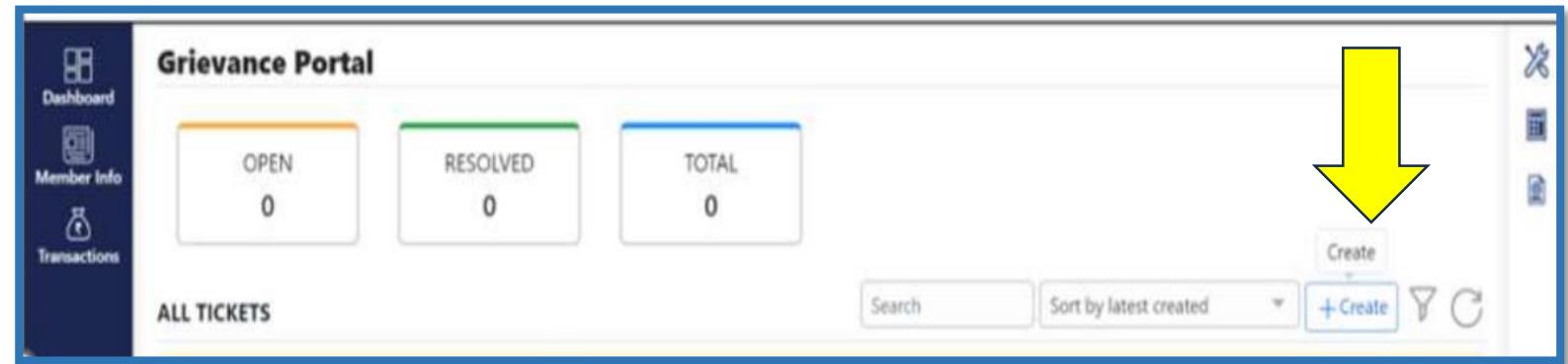
Please click on Transactions button for applying Loans / PF Withdrawal / Transfer Out.

TAX Applicability - Tax on PF withdrawal is applicable if your PF Accumulation is less than 5years. Form 15G or 15H is mandatorily required to upload to get tax exemption, if your PF accumulation is less than 5years and accumulated amount is less than 2.5Lakh.

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

# Online Grievance Portal

**Step 3.2: Click on Create**



The screenshot shows the 'Create Grievance' dialog box. It has a dropdown menu for 'GRIEVANCE TYPE' with options like 'Transfer Out Application' and 'Settlement or Withdrawal Application'. Below it is an 'ATTACHMENT' section with a 'Choose file' button and a 'Browse' button. At the bottom are 'Save' and 'Close' buttons. The entire dialog box is highlighted with an orange border.

**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 :: <u>Separation Portal</u> / <u>PF Portal</u> / <u>Click on Grievance icon</u> (available on right corner up on the portal)/ <u>Select Category and write your query.</u>	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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