

# EPF E-Nomination Guidelines

## YASH TECHNOLOGIES PVT LTD



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## QUALITY MANAGEMENT SYSTEM

### YASH-: EPF E-Nomination Guidelines

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## **1.0 PURPOSE**

The Employees' Provident Fund Organization (EPFO) Nomination process in EPF was in manual mode, where an associate needed to fill his/her Nomination Form 2 at the time of joining an organization making the entire process time consuming. Now EPFO has introduced the E-Nomination facility which is faster and removes intervention of an employer during change in nomination. The automated process of EPF and EPS Nomination now allows Employees to nominate his/her family to claim funds and benefits from EPFO in case of his/her sudden demise.

It is our endeavor to create processes in the organization, which are transparent and associate friendly and formulate Policies & Procedures that govern the welfare and benefits of an associate and make the same known to them.

We are therefore pleased to present the UAN Online PF Nomination Guidelines.

## **2.0 DEFINITION OF PF NOMINATION**

The nomination is the process of naming an individual(s) as a nominee or administrator to receive his or her EPF savings upon the member's death. Every associate has to submit a nomination under the Employees' Provident Fund Scheme, 1952 and Employees' Pension Scheme, 1995. It is always important to nominate a person to your EPF account. Then only the nominated person(s) can withdraw your EPF savings in the event of death and can avail other benefits like Pension and EDLI.

PF Schemes are Social Security measures initiated by the Govt. of India and provides PF members financial stability not only after retirement but also provides benefits to family members.

## **3.0 E-NOMINATION CAN BE FILED SEVERAL TIMES**

Employees can file an E-Nomination several times. However after marriage an associate has to file a revised E-Nomination by nominating Family members (Spouse or Children).

## **4.0 IMPORTANCE OF E-NOMINATION**

As described above the process of EPF Nomination was manual till now. Form 2 was filled by an associate at the time of joining and the same was attested by the employer before submitting to the EPFO. In this process the associate did not have any update about their Nomination status and neither did they receive an acknowledgement of Nomination for future references. Even after submission of Form 2 to the EPFO there was no visibility provided by the EPFO to members about nominations made by them.

To overcome all of the above issues of nomination, the EPFO launched the Online E-Nomination through the UAN member unified portal. Introduction of the new process to file nominations is a step ahead by the EPFO towards its transition of activities to Online Mode.

- Now Nominations filed by a member are E-verified by AADHAR and always available with the member as well as the EPFO.
- If there is a change in employment to a new employer, EPF members need not file the Nomination once again if they have already filed the E-Nomination on the UAN Member Portal.
- Unmarried members can change their earlier filed nomination after marriage. All E-Nominations filed by a member will remain available on the portal for future references.
- In case of the demise of an associate, introduction of the E-Nomination can help family beneficiaries claim EPF accumulation, Pension and EDLI without submitting any paper documents or visiting the employer or the EPFO.
- PF members now have the right to change nomination at any-time as per their will without approaching the Employer. Filing of the revised E-Nomination is also 100% paper less.

## 5.0 FUTURE BENEFITS OF E-NOMINATION

In recent years the EPFO has been moving towards a paperless department. In this process the EPFO has come up with the Online PF withdrawal, PF Advance withdrawal, PF transfer, Online Name, DOB & Gender correction. In coming days we will see all the Online benefits available for PF conditional to filing of the E-Nomination. Below are some important benefits for filing E-Nomination.

- In case of the death of an associate, who is still in service and who has properly filed the E-nomination, Family members (Nominees) do not have a lot of paper work & need not follow up with the Employer and the EPFO office. They will be able to get the PF Fund & Pension Benefit without any difficulty and as early as possible in the Nominees Bank account (if the Associate has also mentioned the banking details of the Nominee during E-Nomination).
- In the future we also expect to see all type of claims from the EPFO like PF withdrawal, Pension withdrawal, PF transfer, Online UAN data correction etc. to be based on the E-Nomination filed by the member. So it is very important to get it filed, as at the time of requirement of the funds, due to no filing, members can face problems in applying for the fund from the UAN member Login.
- Without E-Nomination, members cannot avail the benefits of the online pension application.

## 6.0 MANDATORY REQUIREMENTS TO FILL ONLINE E-NOMINATION

- Activated UAN with login password.
- Clear photograph of the Member (Associate) and the Nominees in JPEG format (**photograph size** cannot be more than **100KB**).
- AADHAR of the Member (Associate) is required along with that of the Nominees as well.
- Address of the Member (Associate) and the Nominees. Avoid special characters while mentioning the address.
- AADHAAR of the Member (Associate) should be linked with his/her Mobile, because the E-nomination application sends OTP for verification to the Mobile number registered to the AADHAAR card.
- Keep you Virtual ID (Virtual ID) ready, it is available on the AADHAAR Portal. For generation of Virtual ID please click this link > <https://resident.uidai.gov.in/vid-generation>.

## 7.0 NORMS TO FILE YOUR E-NOMINATION

Before filing the E-Nomination, members should be aware of the norms to be followed while filing, below are some points to be taken care of while filing your E-Nomination.

- Married male members can nominate their Wife and Children,
- Married female members can nominate their Husband & Children,
- Unmarried members can nominate their Mother and Father as Nominees.
- Any nomination made before marriage will be invalid after the marriage. After the marriage, the member should give a new E-Nomination.
- An EPF member can declare more than one nominee with a specified percentage in which the EPF fund will be divided on the death of the EPF member.
- Nominees outside the family will be invalid.
- In case a minor has been made a nominee, the guardian should be a family member.
- Members can change their nomination whenever they want.
- Where there is no major person in the family, the member may, at his discretion, appoint any other person to be a guardian of the minor nominee.

## 8.0 PROCESS FLOW TO APPLY FOR E-NOMINATION

- **Step 1:-** Login to UAN Unified Member portal  
> <https://unifiedportal-mem.epfindia.gov.in/memberinterface>
- **Step 2:-** Upload your Profile photo on UAN.  
**VIEW>>PROFILE>>CHANGE PHOTO>>BROWSE>>PREVIEW>>UPLOAD PHOTOGRAPH**
- **Step 3:-** Proceed ahead to fill E-Nomination details.  
**MANAGE>>E-NOMINATION.**  
Your details like UAN, name, date of birth, gender etc., are displayed. Provide your 'current and permanent address' details here.  
Click on the **SAVE** button to move ahead.
- **Step 4:-** Choose Family option. **YES for Married and NO for Un-married.**
- **Step 5:-** Here, you need to enter the names, date of birth, relation and address of the nominee. You can even add more than one nominee by clicking on **Add Row**. In case of minor as a nominee, you need to assign a guardian.  
Go to the **EPF nomination** and declare the total amount of share among your nominees by choosing the check box in front of saved nominees. In case, you would like to nominate only one member of your family as your nominee then you can declare 100% as the share. Click on **Save EPF nomination** button

- **Step 6:-** After saving the nominee details, members will be able to see the generated nomination form and view the edits made.
- **Step 7:-** Click on **e-Sign** button to proceed ahead for submission of E-Nomination based in AADHAAR verification.  
After clicking on the E-Sign button a new window will reflect asking go further with the next steps. Click on the **PROCEED** button for AADHAAR verification of your E-Nomination.
- **Step 8:-** a new page of the AADHAAR Demographic Authentication will open, enter your Virtual ID (VID) received as a SMS on your AADHAAR registered mobile. Submit the request by clicking **VERIFY** button for VID authentication.
- **Step 9:-** After successful verification of VID, the portal will be auto routed to the next page for **AADHAAR Based e-Authentication**. Enter your AADHAAR and click on **GET OTP**, a 6 digit OTP will be sent as an SMS on your AADHAAR registered mobile no.  
Enter the OTP and click on the **SUBMIT** button.
- After successful verification of the AADHAAR OTP, a confirmation message will be displayed on the screen as **PDF signed successfully...!!!**.

Members can now download their AADHAAR e-signed nomination Form 2 from the portal.

**MANAGE>>E-NOMINATION>>NOMINATION DETAILS.**

## 9.0 REPORT SUGGESTIONS & QUERIES

We believe an associate is the biggest asset of the Company. Hence; your suggestions & queries are most welcome as it will help us in making the policies more associate friendly. Therefore if you have any suggestions & queries; please raise your request on [pf-helpdesk@yash.com](mailto:pf-helpdesk@yash.com).

## 10.0 ACRONYMS

Company	YASH Technologies Private Limited.
EPFO	Employees' Provident Fund Organization.
UAN	Universal Account Number.
EPF	Employees' Provident Fund.
EPS	Employees' Pension Scheme.
EDLI	Employees Deposit Linked Insurance Scheme.
VID	Virtual ID.
OTP	One Time Password.

**Thank You - Team Payroll**