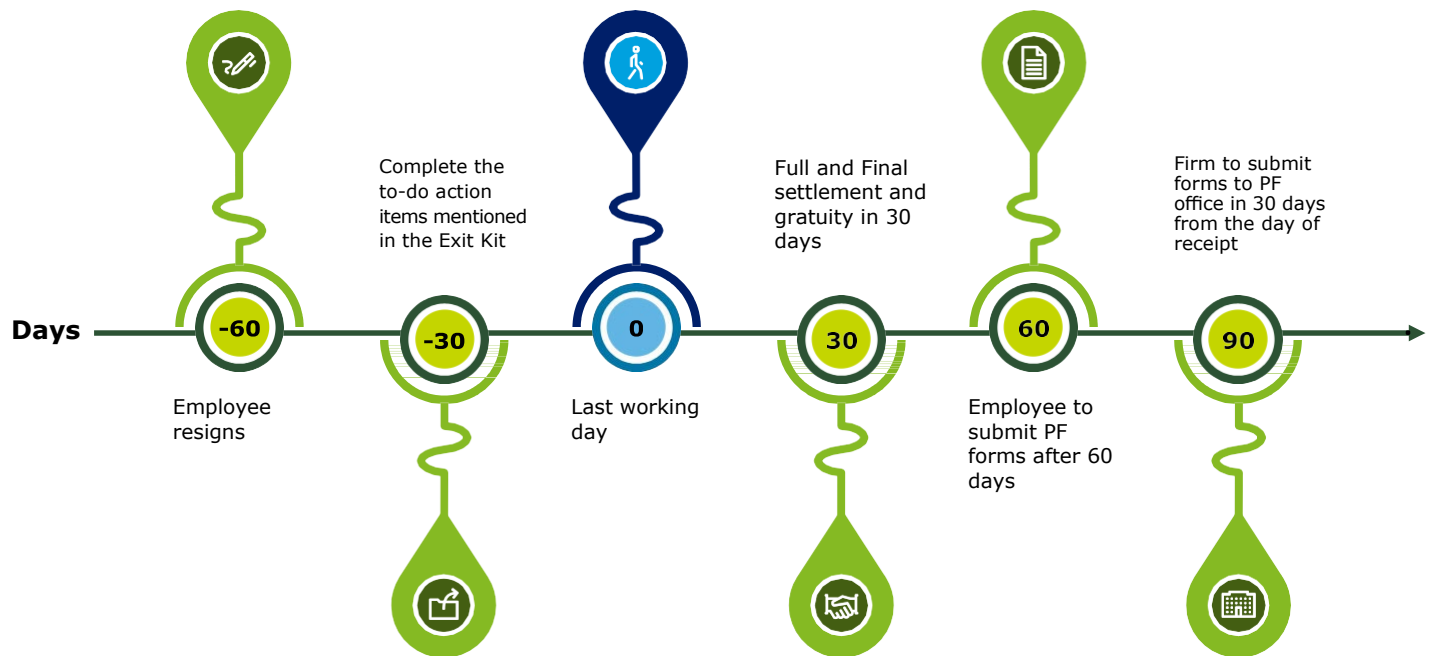




## **U.S. India Exit kit**

A guide for separating employees

# Timelines for employee exit process



**NOTE:** The above timelines are subject to receipt of all applicable inputs and clearances from the concerned teams.

# Introduction

Dear Colleague,

Guided by the philosophy of 'Colleagues for Life', we have always believed in staying invested in our ex-colleagues and hope you will stay connected to us through our various channels of Alumni Relations.

As part of an organization that is committed to people, we endeavor to provide the information you need for a smooth, seamless separation from Deloitte. With this in mind, we are pleased to share this "Exit Kit", which outlines the various steps towards preparing for the separation, including procedures related to Full and Final Settlement, Provident Fund, and Gratuity. You will find a pre-exit checklist as well as useful FAQs to help you navigate through the exit process.

We encourage you to refer to this document throughout your exit period and post exit for a strong, practical understanding of the processes, timelines and touch points involved in exiting from Deloitte. For any additional questions, please reach out to our Talent CIC team at +91 406670 2222 or 1800-2582-2222 (toll free).

Wish you the best in your journey forward.

Talent Team  
Deloitte U.S. India offices

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# Pre-exit action items



# To-do checklist

## Actions to be taken during notice period

Note: All these actions are sole responsibility of the employee. Delay or failure to follow the below timelines may impact the process of final settlement and issuance of the relieving letter.

Action required	Timelines	Contact for assistance
<b>01. Update your contact details</b>	At the time of submission of resignation	Talent Help Desk <ul style="list-style-type: none"> <li>VoIP: 2222</li> <li>Toll free No. 1800-2582-2222</li> </ul>
Update your personal email ID and phone number on 'Resignation Form' on Talent On Demand (ToD) while submitting your resignation. The email ID provided will be used for any official communication after the last working day with the Firm. Ensure that your latest contact information is also updated on the 'My Information' page on ToD.		
<b>02. Enter your Time and Expense details in DTE</b>	Daily basis or every weekend end i.e. on Friday	DTE support <ul style="list-style-type: none"> <li>VoIP: 2222</li> <li>Toll free No. 1800-2582-2222</li> </ul>
Please ensure all time and expense details are updated in DTE (including your last working date). If there is any missing time during your entire Deloitte tenure, please update it accurately on DTE.		
<b>Note:</b> Internet expense should be claimed on monthly basis, as per relevant amount applicable for BCP Internet. Consolidated bills are subject to rejection.		
<b>03. Clear outstanding balance on your AmEx card</b>	Two weeks prior to last working	<a href="mailto:CorporateCards@deloitte.com">CorporateCards@deloitte.com</a>
Any outstanding balance on your Corporate American Express (AmEx) card can significantly delay the relieving process. Please ensure you clear all the dues on your AmEx corporate card. Please shred the card once dues are cleared.		
<b>04. Submit your investment proofs (if declared any investments earlier in current FY)</b>	As per guidelines	Finance Help Desk <ul style="list-style-type: none"> <li>VoIP: 2222</li> <li>Toll free No. 1800-2582-2222</li> </ul>

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Action required	Timelines	Contact for assistance
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The window to submit your investment proofs for final settlement is available on [HR Workways](#).

**Deloitte Net → Talent on Demand → Compensation → My Pay slips, Tax & Reimbursement → Exit Process → IPSF YYYY-YY/Upload IPSF Proof Images.**

Note: If you are serving your notice period during the annual IPSF window period, you are expected to submit your IPSF details during the same window. No exceptions will be made later considering your separation status. The above mentioned IPSF link will not apply for you.

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Take the below steps to upload IPSF proof images:

1. Visit [HR Workways](#) via Talent On Demand
2. Enter your investment details
3. Scan and upload your proofs

For detailed information on guidelines, templates and formats please visit the [USI Payroll](#) Page on Deloitte Net.

**Note:**

- Investment proofs will be accepted as per IPSF guidelines only
- Submit your investment proofs one week before your last working day with the firm
- Investment proofs will not be accepted after the above-mentioned deadline
- Details once submitted and confirmed online cannot be changed under any circumstances. All proofs need to be submitted online as outlined above

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**05. Redeem outstanding Vantage Points**

Prior to last working day

[support@vantagecircle.com](mailto:support@vantagecircle.com)

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Please note that you have until your last day with the Firm (before your Deloitte email expires) to log onto the Vantage Circle site and redeem any outstanding e-points that you might have in your Vantage Circle account. Log onto <https://deloitte.vantagecircle.com> with your Deloitte email ID as your username and enter your password previously established with Vantage Circle; if you have not previously established an account, please follow the prompts to create your password. You may email your questions to support@vantagecircle.com or visit the FAQs available from the top of the 'My Account' page on the website.

---

**06. Submit your tax saving bills**

Before 26<sup>th</sup> of the last month or your last working day (whichever is earlier)

Finance Help Desk

- VoIP: 2222
  - Toll free No. 1800-2582-2222
-

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**Action required    Timelines    Contact for assistance**


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The window to submit your tax saving bills (claim reimbursement bills) is available on [HR Workways](#) only between 2<sup>nd</sup> to 26<sup>th</sup> of every month.

**DeloitteNet → Talent on Demand → Compensation → My Pay slips, Tax & Reimbursement → My Transactions → Tax saving bills (Claim Reimbursements)**

**Note:**

- Bills need to be submitted only on HR Workways during the above mentioned timelines for successful processing.
- No bills will be considered if provided by any other medium, such as an email

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**07. Download all your financial documents**

Visit [Talent on Demand](#)

Finance Help Desk

- VoIP: 2222
  - Toll free No. 1800-2582-2222
- 

Kindly ensure you download your pay slips, Form 16 from [HR Workways](#) and compensation letter from [Talent On Demand](#). Please note you will not be permitted to transfer any data to your personal mail ID or external cloud. In case any transfer of personal data needs to be performed, it can be done only during the notice period, for which you need to reach out to the US Data removal request team at [usdataremovalrequest@deloitte.com](mailto:usdataremovalrequest@deloitte.com) a week prior to your LWD.

For further assistance, you will also receive an exclusive set of credentials from Info Excelity to access HR Workways, post your full and final settlement gets processed. You will be able to download copies of your personal documents i.e. pay slips (only previous eighteen months\*), Form 16 (only previous two years\*), and Income Tax computation statement (only previous two years\*). This window will be available ONLY for sixty days from your last working day. These documents will not be provided, if requested later.

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**08. Return your access card/ID badge**

ID Card to be submitted along with other peripherals

Hyderabad-[USHydBadging@deloitte.com](mailto:USHydBadging@deloitte.com)  
 Bengaluru-[USBlrBadging@deloitte.com](mailto:USBlrBadging@deloitte.com)  
 Mumbai-[USMumbaiBadging@deloitte.com](mailto:USMumbaiBadging@deloitte.com)  
 Delhi-[USDelhiBadging@deloitte.com](mailto:USDelhiBadging@deloitte.com)

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You can opt for any of following options for submitting Deloitte assets:

- 1) Asset submission at the office - Asset submission is possible through a prior appointment which will be shared only a day before your preferred date.
- 2) Pick-up facility from residence - You will be contacted by Deloitte vendor partner for pick-up of assets from your residence. Please update your full address using the link below. There is a dependency on the vendors considering increased pandemic restrictions, hence do expect a delay in pick-up and the subsequent Full and Final (FNF) settlement.

Detailed information on Virtual off-boarding process will be communicated through **Virtual Off-boarding mail**.

**Onsite deployed USI employees:** In case you are submitting your badge while on **onsite deployment**, please ensure that you receive an email confirmation about the submission from the local Badging team. Please share a copy of the email with [USIIndiaExitManagement@deloitte.com](mailto:USIIndiaExitManagement@deloitte.com) providing your employee ID and last working date and maintain a copy of this correspondence for future reference.



Action required	Timelines	Contact for assistance
<b>09. Return your pedestal keys</b>	Keys to be submitted along with other peripherals	<a href="mailto:USOneTeamIndia@deloitte.com">USOneTeamIndia@deloitte.com</a>   x2222 option 4

USI office locations are specified in the **Employee Exit Guidelines**.

<b>10. Return your Communication s Gym resources</b>	CE GYM resources submitted to be along with other peripherals	USIndiaCommGym@deloitte.com
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Please return, if any, books/DVDs, resources of the Communications Gym, if borrowed any. In case of non-submission, an amount equivalent to the value of the borrowed resources will be deducted from your final settlement. Under no circumstance, the amount once deducted will not be paid back.

<b>11. Settle your car lease</b>	One week prior to last working	<a href="mailto:USICarLeaseAdministration@deloitte.com">USICarLeaseAdministration@deloitte.com</a>
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If you are availing the firm-provided car lease facility, you need to settle your lease with the vendor at least one week before your last working date.

<b>12. Update the transport department</b>	One week prior to last working day	Hyderabad- <a href="mailto:USHydTPTHelpdesk@deloitte.com">USHydTPTHelpdesk@deloitte.com</a> Bengaluru- <a href="mailto:USBlrTPTHelpDesk@deloitte.com">USBlrTPTHelpDesk@deloitte.com</a> Mumbai- <a href="mailto:USMumTransportHelpdesk@deloitte.com">USMumTransportHelpdesk@deloitte.com</a> Delhi- <a href="mailto:USDelhiTPTHelpdesk@deloitte.com">USDelhiTPTHelpdesk@deloitte.com</a>
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- Please ensure you communicate about your last working date to the transport team to avoid being rostered thereafter.
- Applicable only to Hyderabad professionals who are still availing Transport facility for night shifts.

<b>13. Return your ITS assets</b>	virtual Off-boarding Process	
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You can opt for any of following options for submitting Deloitte ITS assets:

#### **Asset submission at the office / Pick-up facility from residence**

Detailed information on Virtual off-boarding process will be communicated through **Virtual Off-boarding mail** which will be sent 1-2 weeks prior to the last date on Deloitte & personal email ID.

The worth of the accessories which are not submitted will be recovered in the Full and Final Settlement. Please ensure to take a back-up of your smartphone before your last day as the ITS will wipe out all data from it on your last day and you will have no option to back it up following this.

**Note-No data will be available once assets are returned, post last working day.**

Action required	Timelines	Contact for assistance
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<b>14. Validate your bank details on Talent on Demand</b>	Before the last working day	Finance Help Desk <ul style="list-style-type: none"> <li>• VoIP: 2222</li> <li>• Toll free No. 1800-2582-2222</li> </ul>
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Please ensure your bank details reflecting on Talent on Demand are accurate, since the final settlement amount will be transferred using these bank details at the time of payment. No other bank details apart from the ones submitted on Talent on Demand will be considered later, for settling the amounts.

**Note:**

- Clause payments such as joining bonus, notice period buyout, relocation reimbursements, and training bonds will be subject to review with your Service Line Leader and could impact the final settlement amount.
- Expenses submitted in DTE close to your last working day may impact your clearances and final settlement timelines.

<b>15. Make note of the bidding adieu email</b>	As soon as you receive it	Finance Help Desk <ul style="list-style-type: none"> <li>• VoIP: 2222</li> <li>• Toll free No. 1800-2582-2222</li> </ul>
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**Important:**

If you are part of the Emergency Rescue Team (ERT)/ Fire Wardens, please reach out to the below SPOCs at your location so that they can identify a replacement.

Action required	Timelines	Contact for assistance
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<b>16. Sodexo Meal Card</b>	Utilize the Sodexo amount on your card (if any) within 90 days from your last working day with the firm	<ul style="list-style-type: none"> <li>• <b>Email:</b> <a href="mailto:cardsupport.in@sodexo.com">cardsupport.in@sodexo.com</a></li> <li>• External: 1800-130-3030 &amp; 1800-267-3030</li> </ul>
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# Pre-exit FAQs

## **What documents do I need to download from HR Workways before leaving Deloitte?**

Kindly ensure you download the below mentioned documents available for you on [HR Workways](#). Please download these at least one week before your last working date. You will not have access to these documents after your last working date with the Firm–

- Pay slips
- Form 16
- Income Tax computation sheet

### **Important:**

- For further assistance, you will also receive an exclusive set of credentials from Info Excelity to access HR Workways, post your post your payroll for your last month at Deloitte gets processed. These credentials will be shared on 10th of the next month to your personal email address. You will be able to download copies of your personal documents i.e. pay slips (only previous eighteen months\*), Form 16 (only previous two years\*), and Income Tax computation statement (only previous two years\*). This window will be available ONLY for sixty days from your last working day. These documents will not be provided, if requested later.
- You are also requested to download your latest compensation letter from Talent on Demand.

## **When will I receive the salary for last month of my employment?**

Amount for the number of active days you served in the last month at Deloitte will be paid as regular salary, on the last working day of the respective month. Pay slip for the same can be downloaded once the login credentials are shared by Excelity by 10th of subsequent month.

Any excess salary that is paid out due to change in last working day, will be recovered in your Full & Final settlement. Likewise, any one time payments like leave encashment for your leave balance, bonus etc will be paid as part of your Full and Final settlement.

## **When will I receive the credits on my Sodexo meal card?**

As per the process, the Sodexo amount is loaded for all professionals (who have opted in) around 5th of the respective month. Example: The Sodexo amount for the month of April 2019 will be loaded on 5<sup>th</sup> of April 2019.

## **I'm serving my notice period and my last working day is 19th of this month. Will I receive the Sodexo credits for the whole month?**

If a professional who has opted in for Sodexo credits leaves the firm, his/her meal card will not be loaded for that specific month. The Sodexo amount for this month will be prorated and will be paid along with your salary as part of the Full and Final settlement. In case the Sodexo amount is loaded fully for this month, the recovery (as applicable) considering your last working date will be processed in the settlement.

## **Once I leave the firm, will I be able to use my Sodexo balance?**

The balance amount on the card (if any) should be utilized within 90 days from your last working date with the firm, post which the amount will lapse. Moreover, this amount cannot be transferred to any other firm providing Sodexo card to you.

# Post-exit guidelines



# Full and Final settlement

The FAQs in this section detail the final settlement process with timelines followed for various activities involved. The potential income and deduction components which could be part of the final settlement are also noted. Actions to be taken by you are highlighted along with timelines for smooth closure of the final settlement process and issuance of relieving letter to you.



## **How is the final settlement done and when will I receive the amount?**

The final settlement computation is done by the Payroll team after the last working day of the employee. This computation is done only after receiving clearances from various teams mentioned as part of the pre-exit checklist previously above. Once all the clearances are received, the Payroll team will compute the final settlement amount to check whether the final amount is payable to you or if a recovery is required from you. To know the status of your full and final settlement please send an email to the Talent Exit team at [USIIndiaExitManagement@deloitte.com](mailto:USIIndiaExitManagement@deloitte.com)

### Will I be paid any amount for the leave balance?

Leave balance on the last working day will be considered in the Full and Final Settlement calculation. The leave encashment/notice period shortfall is computed on the monthly basic pay. The notice period recovery and leave encashment will be treated as two separate components and shown accordingly on the final settlement.

### Whom can I reach out to for information on my compensation and variable bonus?

For any information on your compensation and variable bonus you may reach out to your respective Talent Business Advisor or call up the Talent CIC team at +91406670 2222 or 1800-2582-2222 (toll-free).

### What deductions could be made on my final settlement?

The following deductions may be part of the final settlement:

- Deductions on account of 'Clause Payments' like joining bonus, notice period buyout/earnings, relocation, etc. which would be recovered if stated clause period is post the last working day, i.e., when the required period of tenure is not served by the professional. If the amount is being recovered in the year subsequent to the financial year in which the amount was initially paid, the TDS deducted on such a payment at the initial stage will not be considered while recovering and will also not reflect on Form 16.

### Example:

A Joining bonus of INR 50,000 paid in FY 2011-12, attracts a TDS of INR 5,000 @ 10% Tax rate which needs to be borne by the professional. When the same is recovered in FY 2012-13, the entire amount of INR 50,000 is recovered from the employee and not the differential amount INR (50,000-5,000 = 45,000).

In case the amount is being recovered in the same financial year, the TDS deducted will reflect in Form 16 and the corresponding tax benefit for the same will be accrued while filing your Income Tax Return (ITR). The same TDS will not be adjusted against the recoverable amount.

In case the amount is being recovered in the subsequent financial years, the TDS will not reflect on Form 16. As a result, no tax benefit will be provided to the professional.

- Deductions on account of non-submission of ITS assets like laptop chargers, laptop bags, privacy screens, cable lock, mouse, headphones, PDA, etc. and Operations related items such as ID card, desk keys, or any other assets provided
- Deductions on account of inputs received from Learning & Development team for any Training bonds.
- Excess DTE claims outside of policy or where receipts have not been provided
- Deductions towards CPA expenses/Other certifications
- Outstanding Amex corporate cards dues

- Outstanding Car lease dues
- Communication Gym charges on account of default in returning of books/CDs/manuals/other assets etc.

#### **What happens if the final amount is “Payable” to me?**

The Payroll team will provide this information to the Talent Exit team post your last working day after receipt of all exit clearances from teams involved, post which the Talent Exit team will provide the relieving letter to you in soft copy through email as per their timelines. The final settlement processing will be completed in 30 calendar days from your last working day. (This action will be taken if the Payroll team has received all applicable inputs and clearances from the concerned teams).

The final settlement amount will be transferred online through Electronic funds transfer (EFT) to your salary account (primary bank account) last updated on Talent on Demand.

The final settlement statements (final pay slip and income tax computation statement) will be sent to you via email one week after the payment of final settlement amount. This will be sent from [info@excelityglobal.com](mailto:info@excelityglobal.com) to your personal email ID, updated by you on Talent on Demand. Please ensure to add this email to your safe sender list or alternatively monitor your junk folder to ensure receipt.

**Note:** In case your bank details available in records are not valid at the time of payment and there hasn't been any communication from your end to the Payroll team regarding the correct bank details, the final settlement amount will be transferred to the Labor Department after 3 years (2 years for Gurgaon) as per the Central Labor Laws. Once the amount is transferred by the firm to the Labor Department, you will have to reach out to them for claiming your final dues

#### **What happens if the final amount is a “Recovery” from me?**

The Payroll team will provide this information to Talent Exit team post your last working day after receipt of all the exit clearances from teams involved. Post which the Talent Exit team will convey the recovery amount to you. You can pay the recovery amount by transferring the amount online to the Firm account through EFT.

The name of your legal entity can be found on the pay slip. Deloitte bank account details will be conveyed by the Talent Exit Team. You can also contact the Talent Exit team at [USIIndiaExitManagement@deloitte.com](mailto:USIIndiaExitManagement@deloitte.com) for the same post your last working day.

#### **Recoverable Amount Paid via EFT (Electronic funds transfer)**

The Talent Exit team will update the payment details and provide the relieving letter to you in soft copy through email after five working days from the date of payment after receiving a confirmation on the same from the Treasury team (Payroll team).

The final settlement process will be completed after 30 calendar days, from your last working day.

The final settlement statements (final pay slip and income tax computation statement) will be sent to you through email one week from the date of issuing of the relieving letter. This will be sent from [info@excelityglobal.com](mailto:info@excelityglobal.com) to your personal email ID, updated by you on Talent on Demand. Please ensure to add this email to your safe sender list or alternatively monitor your junk folder to ensure receipt. For any clarification on the details provided in final settlement statements or recovery amount, you can send an email to [USR10FaceoffFinance@deloitte.com](mailto:USR10FaceoffFinance@deloitte.com)

#### **What is the time frame for completion of Full and Final Settlement?**

The final settlement processing will be completed within 30 calendar days, from your last working day. As per the process, the relieving letter will be issued to you within 30 calendar days from your last working date with the firm (subject to exit clearance received from all the stakeholders involved in this process). To know the status of your full and final settlement please send an email to the Talent Exit team at [USIIndiaExitManagement@deloitte.com](mailto:USIIndiaExitManagement@deloitte.com)

Also note the relieving letter will be issued to you only if the projected final settlement outcome is payable to you. If the projected final settlement outcome is recovery from you, then the relieving letter will be issued to you in 5 working days, post the firm receiving the recovery amount from you.

#### **Will I receive a cheque, or would it be an EFT (Electronic funds transfer) to my bank account?**

The final settlement amount will be transferred online through EFT (Electronic funds transfer) to salary account (Primary bank account) last updated on Talent on Demand. You may modify these bank details (if required) prior to your last working date.

#### **What documents I will receive as a part of Full and Final Settlement?**

The final settlement statements (final pay slip and income tax computation statement) will be sent to you through email after a week from the payment of final settlement amount. This will be sent from [info@excelityglobal.com](mailto:info@excelityglobal.com) to your personal email ID updated by you on Talent on Demand.

#### **What document will I receive as part of my relieving?**

You will be provided the experience cum relieving letter, within 30 calendar days post last working date, subject to all exit and final settlement clearances. All the clearances from respective stakeholders should have been completed. The Talent Exit team will send a digitally signed soft copy of the letter to your personal email ID. In case of any queries on your relieving letter, you may send an email to the Talent Exit team at [USIIndiaExitManagement@deloitte.com](mailto:USIIndiaExitManagement@deloitte.com)

#### **Who should I reach out to in case I notice a discrepancy or issue with my Full and Final settlement?**

To know the status of your full and final settlement please send an email to the Talent Exit team at [USIIndiaExitManagement@deloitte.com](mailto:USIIndiaExitManagement@deloitte.com)

For any clarification on the details provided in final settlement statements. Please email [USR10FaceoffFinance@deloitte.com](mailto:USR10FaceoffFinance@deloitte.com) specifying the below details.

- Emp ID
- Deloitte Email
- Deloitte Entity



- PAN
- Personal Email ID last updated on ToD
- Last working Date with Deloitte

### **What proof can I submit to my new employer as previous income details with Deloitte?**

Once you receive the final settlement statement from Deloitte, you can submit the income tax computation statement to your new employer as proof of previous income details with Deloitte.

### **How and when will I receive the Form 16 for current financial year?**

As per process, the Form 16 for the current financial year will be ready and sent to you through email during the 1st week of June of subsequent financial year. This will be sent from [info@excelityglobal.com](mailto:info@excelityglobal.com) to your personal email ID, which you have updated on Talent on Demand.

**Note:** Please wait till end of June to receive your Form 16. If you do not receive your Form 16 latest by the end of June, then please write to [usr10faceoffinance@deloitte.com](mailto:usr10faceoffinance@deloitte.com) specifying the below details.

- Emp ID
- Deloitte Email
- Deloitte Entity
- PAN
- Personal Email ID last updated on ToD
- Last working Date with Deloitte

### **Is gratuity paid as part of the full and final settlement?**

The gratuity amount (only if you are eligible) is settled separately and is not a part of your full and final settlement. Refer to the [Gratuity](#) section for more details.

# Provident Fund

This section talks about the Provident Fund (PF) account maintained by Deloitte with the Regional Provident Fund Commission (RPFC) office. This will also let you know about the processes involved with timelines for PF transfer and PF withdrawal activities. It highlights when you can initiate the PF transfer or PF withdrawal after you leave the Firm



## **What is the PF scheme?**

It is a mandatory tax-qualified defined contribution retirement benefit plan where an equal contribution at the rate of 12% (12% of basic pay and an equivalent amount is contributed by the employer). The same is payable in total on retirement. For more details, you can refer the PF website: [www.epfindia.com](http://www.epfindia.com).

## **Does Deloitte maintain PF with RPFC or Trust?**

Deloitte maintains the PF account with the Regional Provident Fund Commission (RPFC).

**Is there a provision for me to raise my grievance with the RPFC?** Yes, there is a provision for you to submit grievance online at the PF site. PF home page → For Employees (Under Services Option) → EPFIGMS (Register your Grievance)

**What is the employees' and employers' contribution towards PF?**

As per statutory requirement the employee contributes 12% of basic salary and an equivalent amount is contributed by the employer.

**What is the percentage of contribution towards the provident fund and pension scheme?**

Employee's contribution of 12% of basic salary is fully deposited in the provident fund account. The employer's 12% contribution is deposited as follows: 3.67% is deposited to Provident fund and 8.33% is deposited in Pension scheme (capped at INR.1,250 per month).

**Is there any interest earned on the amount deposited in the PF account?**

Compound interest as declared by the government is given for every year of service.

**Where can I find my PF account number, maintained by Deloitte?**

Your PF account number is available on your pay slip of Deloitte. It is mentioned on the top-right-hand corner of your pay slip.

**What do I do with my Deloitte PF account after I leave the Firm?**

After leaving the Firm, if you are continuing to work with the new employer, as per the PF Act you need to transfer the funds from Deloitte PF account to the PF account maintained by your new employer. If you discontinue to work after leaving the Firm, then you can withdraw the amount from the Deloitte PF account. The PF withdrawal process is provided in the separate FAQ below.

**How can I check my PF accumulations?**

To check your PF accumulations, log in on the UAN member portal (<https://unifiedportal-mem.epfindia.gov.in/memberinterface/>), and download the passbook which will provide you with PF accumulations (as updated in PF records)

**When is an employee eligible for the pension scheme certificate?**

For an employee to become eligible for pension fund, he/she should complete continuous service of 10 years.

**What is meant by continuous service of 10 years?**

Continuous service of 10 years in Employee Pension Fund would mean that you have been employed continuously for the past 10 years and you have not withdrawn your pension but kept transferring it from one employer to another. This is treated as continuous service.

## Example:

An employee who has worked with ABC Company for 3 years, then resigned from that organization and joined XYZ Company, wherein he/ she worked for 2 years, then resigned from there to join another establishment for 5 years. During these 10 years of service if the employee has not withdrawn pension fund, but transferred it between employers, then it is considered as continuous service of 10 years.

### When can an employee avail the benefit of employee pension fund scheme?

An employee can avail this benefit after completion of 58 years of age, provided the condition of 10 years of continuous service is met.

### Under what circumstances should I transfer my PF account to the new organization?

If you are joining a new employer, as per PF Act, you need to transfer your funds from Deloitte PF account to PF account maintained by your new employer.

### What is Universal Account Number (UAN)?

The UAN acts as an umbrella for the multiple Member IDs allotted to an individual by different establishments. The idea is to link multiple Member Identification Numbers (Member ID allotted to a single member under single Universal Account Number. This will help the member to view details of all the Member Identification Numbers (Member ID linked to it. If a member is already allotted Universal Account Number (UAN then he/she is required to provide the same on joining new establishment to enable the employer to in-turn mark the new allotted Member Identification Number (Member ID to the already allotted Universal Identification Number (UAN.

### Where can I find my UAN, maintained by Deloitte?

Your UAN number (if available will reflect on Deloitte pay slip. It will reflect on the top-right hand corner of your pay slip.

### What if I do not find my UAN on pay slip?

If UAN is not available your pay slip, you will have to connect with your new employer for generation of UAN.

### Where can I get more details on UAN?

Please click on the below link to know more about UAN

<http://uanmembers.epfoservices.in/faq.php>

### How do I activate my UAN and log in to my UAN profile?

Please refer the UAN activation process document available as an attachment.

### What is the process of transferring my PF to New Employer? If the new employer maintains PF account with RPFC (Regional Provident Fund Commission)

You need to initiate the PF transfer online at the UAN member portal (<https://unifiedportal-mem.epfindia.gov.in/memberinterface/>) after 60

calendar days from your last working date with Deloitte. You have an option to initiate PF transfer online either through Deloitte or your new employer.

If you have opted to initiate the PF transfer with Deloitte, send scanned copy of the signed forms to [pfonlineclaims@deloitte.com](mailto:pfonlineclaims@deloitte.com) within seven days of initiating the PF transfer. Please retain the hard copy of the forms for your records.

Please use the claim ID as the file name for the scan copy of the signed forms. In the subject, please use "Scan Copy of PF online Forms—with claim ID" also include your complete name, employee ID and Deloitte PF account number in the email. Once we receive the signed scanned copy, the claim will be validated and approved online in two weeks.

#### **What is the process for PF withdrawal?**

As per the PF act, if you are currently employed, you must transfer the funds from Deloitte PF account to the PF account maintained by your current employer.

If you are not employed anywhere, you can initiate the PF withdrawal after 60 calendar days from your last working date with Deloitte.

You must initiate the withdrawal online. Process is available in the attached 'PF kit'. Due to the ongoing work from home situation all the manual procedures are kept on hold until further update.

#### **Can I withdraw my PF if am leaving the Firm within six months of service?**

Yes, you can withdraw your PF amount if you are leaving and have not completed six months of service with the Firm. You cannot withdraw the pension amount as per the PF Act.

#### **I am facing issues while submitting the claim online. Whom do I reach out to for assistance?**

You can write to US India PF Administration (US—Hyderabad) [usipfadministration@deloitte.com](mailto:usipfadministration@deloitte.com) with a screenshot of the error that you see on the portal, post which the PF admin team will assist you with the manual process and file forms with PF office.

# Gratuity

This section covers the Gratuity benefit provision available with the Firm and the eligibility criteria for gratuity claim. This will also inform you on the activities involved around gratuity settlement.



## **What is Gratuity?**

Gratuity is received by an employee from the employer in gratitude for the services offered by the employee in the company. Gratuity is a defined benefit plan and is one of the many retirement benefits offered by the employer to the employee upon leaving his/her job. An employee may leave for various reasons, such as retirement/superannuation, for a better job elsewhere, on being retrenched, or by way of voluntary retirement and still be eligible for Gratuity.

## **How will I know whether I am eligible for Gratuity claim?**

If you have served the Firm for more than 4 years and 240 calendar days continuously, you will be eligible for Gratuity claim.

## **If I am eligible for Gratuity claim, how can I initiate this settlement?**

If you are eligible for Gratuity claim, the Firm will automatically initiate the settlement after your last working date with the Firm. You need not take any action for initiating the Gratuity settlement.

**If I am eligible for Gratuity claim, when will the settlement be done?**

If you are eligible for Gratuity claim, the settlement will be done after 30 calendar days from your last working date with the Firm.

**How is Gratuity calculated?**

It is calculated as per the below mentioned formula mentioned in the Gratuity Act 1972.

Gratuity =  $15/26 \times \text{monthly basic salary} \times \text{number of years (with the firm)}$   
Where Basic is the last drawn monthly basic salary by the eligible employee

**Note:** In case the employee is on a Flexible Work Option (FWO), the monthly basic under the full workload conditions will be considered and not the reduced basic pay.

**How will I receive the gratuity settlement amount?**

The gratuity settlement amount will be transferred only online, through Electronic funds transfer (EFT) to your primary bank account last updated on Talent on Demand.

**Note:** Please be sure to update your bank account details with the same name as it appears in your pay slip. This is to avoid any rejects due to name mismatch with the bank records during the electronic funds transfer process.

**Will my service with the Firm be considered continuous if my entity has changed (transfers from one FSS to another) due to business reason without any break in service?**

Yes, if your entity has changed due to business reason without any break in service, then your complete tenure with Firm (i.e., from date of joining the Firm till date of leaving with the Firm) will be considered for gratuity calculation.

## Example 1:

- Date of joining the Firm is January 10, 2004
- Last date under previous entity is October 31, 2010
- Start date under new entity is November 1, 2010
- Date of leaving with Firm is January 31, 2014

In the above example, since there is no break between last date under previous entity (October 31, 2010) and start date under new entity (November 1, 2010), the complete tenure which would be considered for gratuity calculation will be Date of joining the Firm (January 10, 2004) to Date of leaving with Firm (January 31, 2014).

## Example 2:

- Date of joining in U.S. is January 10, 2004
- Last date in U.S. is October 31, 2010
- Start date in India is November 1, 2010
- Date of leaving in India is January 31, 2014

In the above example since your start date in India is (November 1, 2010) you will be covered under all India benefits only from start date in India is (November 1, 2010). In this scenario the tenure that will be considered for gratuity calculation will be the start date in India (November 1, 2010) to Date of leaving in India (January 31, 2014).

### What is the ceiling for payment of gratuity amount?

As per the prevalent provisions of the Gratuity Act, INR 20 Lakhs is the maximum amount that can be paid.

### I completed five years with Deloitte, out of which one year I was an intern and rest four years as regular employee. Am I eligible for gratuity?

No, your service with the Firm will be considered only from the time you are a Full Time Employee with the Firm.



# Alumni Relations

## Colleagues for Life

This section entails a brief overview of the alumni program, privileges and what to expect after you leave Deloitte.

### What's in it for me?

- Opportunities to return to Deloitte or refer friends and family for open positions
- Opportunity to stay connected with your network of former colleagues and fellow alumni through networking events and connects
- Access My Deloitte for market insights and thought leadership through the Deloitte alumni website ([www.Deloitte.com/usi/alumni](http://www.Deloitte.com/usi/alumni))

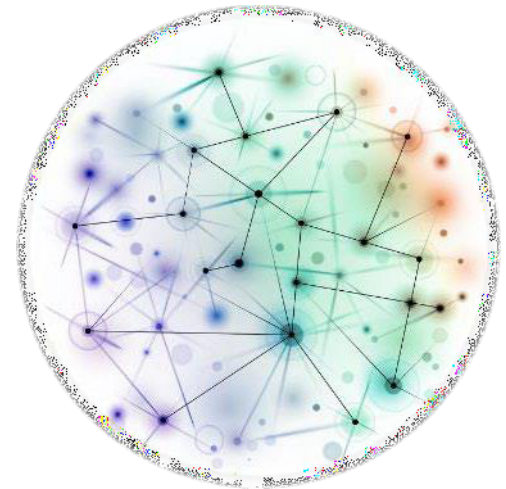
### What can I do before I leave?

- Complete the [Alumni program survey](#) to help us share relevant content
- Follow the [Deloitte USI LinkedIn](#) page to stay abreast with the latest at Deloitte

### How do I stay connected?

- Ensure to keep your contact information and other professional details updated in your records with alumni team by sharing any change in employment, location, skill, or contact information through an easily accessible form called [Update your information](#) available on [www.Deloitte.com/usi/alumni](http://www.Deloitte.com/usi/alumni)
- Keep your employment number (personnel number) and the personal email ID that you shared with Deloitte at the beginning of your employment handy for future reference
- Save the alumni team's mailbox ([USIndiaAlumniRelations@deloitte.com](mailto:USIndiaAlumniRelations@deloitte.com)) for any queries that you may have related to your employment at Deloitte or about the Deloitte alumni program post your exit

### Alumni Relations Team



# Contact us

Below are the contact details for any assistance required on various activities associated with your separation from Deloitte

Please provide the below mentioned details while writing to any of these teams:

Name:

Employee ID:

Last Working Date:

This will help us in extracting your relevant information from records for providing you the quickest and most appropriate response

<b>For queries on status of final settlement, exit process and relieving letters</b>	<a href="#">USI India Exit Management (U.S.)</a>
<b>For queries on PF**</b>	<a href="#">U.S. India PF Administration (U.S.-Hyderabad)**</a>
<b>For queries on calculation of final settlement/gratuity</b>	<a href="#">U.S. R10Face of Finance (U.S.-Hyderabad)</a>
<b>For queries on DTE expenses</b>	<a href="#">US India Expense Compliance &amp; Expense Compliance (US-Hermitage)</a>
<b>For queries on leave and time details</b>	Talent CIC team Toll free No. 1800-2582-2222
<b>For queries on Medical Insurance</b>	<a href="#">U.S. India Insurance Benefits</a>
<b>For queries on Car Lease</b>	<a href="#">US India Car Lease Administration</a>  Talent CIC team Toll free No. 1800-2582-2222

<b>For queries on AmEx corporate credit card</b>	<a href="#">U.S. R10American Express Corporate Cards (U.S.)</a> & <a href="#">US Corporate Cards (Amex- P-Card– Recruiting-Meeting-Conferencing-FON card) (US)</a>
<b>For information on employee care center/HR Letters</b>	<a href="#">US HYD HR-ECC(US)</a>

**\*\*NOTE:** For queries on PF, in case you do not receive a response from PF admin team within 5 business working days, please reach out to Finance help desk at +91 40 6762 2222 (option 1) or 1800 2582 2222 (toll free number).

# Thank you





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