Instruction Manual for
Form 31 (Para 68 BD)
# DOCUMENT UPDATE HISTORY

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<tr>
<th>S. No</th>
<th>Date of Submission / Change</th>
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<td>1.</td>
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<td>Draft version for review</td>
<td>1.0</td>
<td>Smt. Shanthi Sivaram, DD(IS), NDC</td>
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<td>Sh. Vikram Dattatri, AD(IS), NDC</td>
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A new function is provided to settle Form-31 (Para 68 BD) with following conditions –

- Service should be atleast 3 year. For counting service, services for which benefit already taken is excluded.
- Balance (including contribution with interest) should be atleast 20000.
- No settlement/advance under para68bd done before.
- Member not crossed 58 years.
- In case of EMI, commencement month/year should be future month..
- Maximum amount admissible will be 90 % Employer share + 90 % Employee share.

**PROCESS FLOW**

**Role : DA RECEIPT**

- DA receipt will enter the Form-31 claim selecting scheme Para 68bd
Role: DA Account

- DA will select the Form 31 – Advance (68BD) function [New Function]

- On clicking the function task will appear
• On clicking the task given screen will appear

• Personal Detail link will show given screen will details like Mobile Number, Gender, DOB, e-mail etc

• From EPFO Application version 5.68 dated 22/09/2017, SMS and E-mail intimation is sent to member about EMI debit from his account.
- Address details can be edited/viewed through communication details link.

- Payment details can be entered through “Payment details” link. In this page, Loan Account Number, IFSC code to be entered.

- Option has been provided to opt for EMI payment.
• If EMI option is selected, the details about EMI (EMI amount, number of installment, EMI commencement date) to be entered.

• Calculation details can be viewed through link “calculation details”
For EMI cases, Certificate of EMI details are generated along with worksheet on clicking worksheet.
When the eligibility criteria is met and all details are entered, DA account clicks update button, generates worksheet by clicking worksheet button and submit the claim.

Claim will move to SS/AO/APFC depending upon the delegation of power.

SS/AO/APFC can approve or need to edit the claim. If approved the claim is available at DA scroll for scroll generation. For EMI cases, no scroll will be generated, instead data is stored in master table for release of installment.

For EMI cases, every month, claim is auto generated and pushed to scroll for processing. Procedure will be executed automatically every month to process EMI cases. For all active EMI cases, balance will be checked i.e. EMI amount is greater than 90% of Employee share + 90% of Employer share, and if available to meet EMI amount, claim will be auto-generated and pushed to scroll. Rest of the activities is same as that of existing claim procedure.

New feature is added to send SMS and E-mail to member on EMI debit from his PF Account