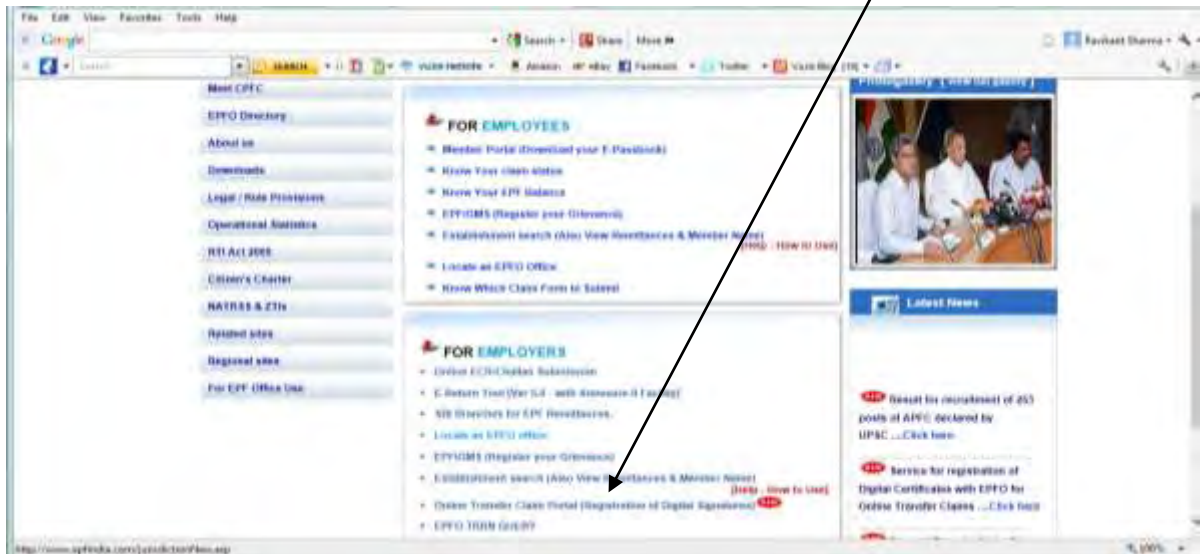
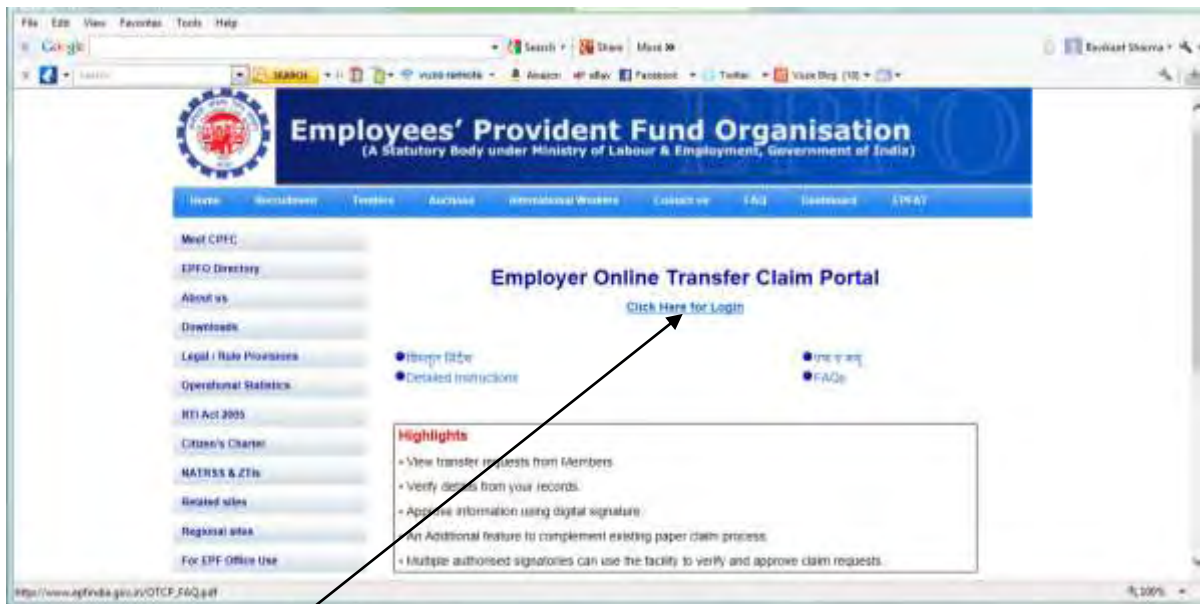


PROCESS FLOW FOR ATTESTATION OF ONLINE TRANSFER CLAIMS

To forward the online claims submitted by members, the employer should attest the claims submitted by the member on Online Transfer Claim Portal (OTCP) using his Digital Signature Certificate (DSC). For the purpose, please click on the “**Online Transfer Claim Portal (OTCP)**” under the Heading “**FOR EMPLOYERS**” on the homepage of EPFO website www.epfindia.gov.in.



The following screen would appear:

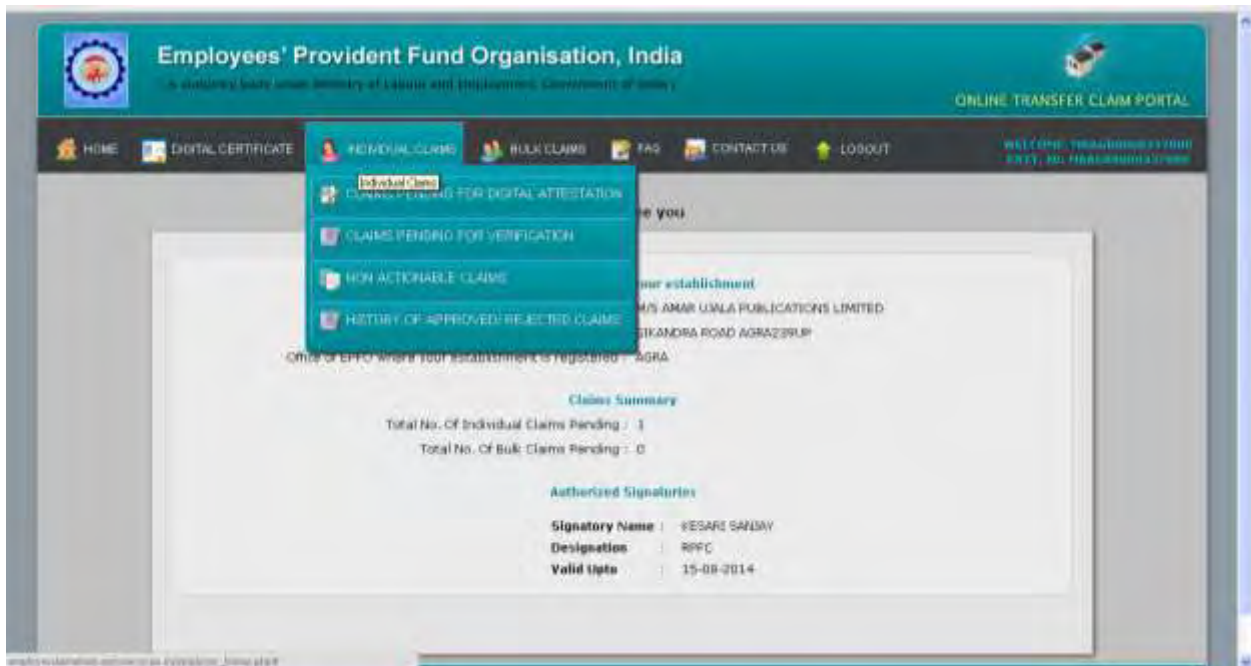


Please click “Click Here for login”. The following screen would appear.



Username and password for this portal is same as is already being used in ECR portal by the establishments.

After the login the screen shows as:

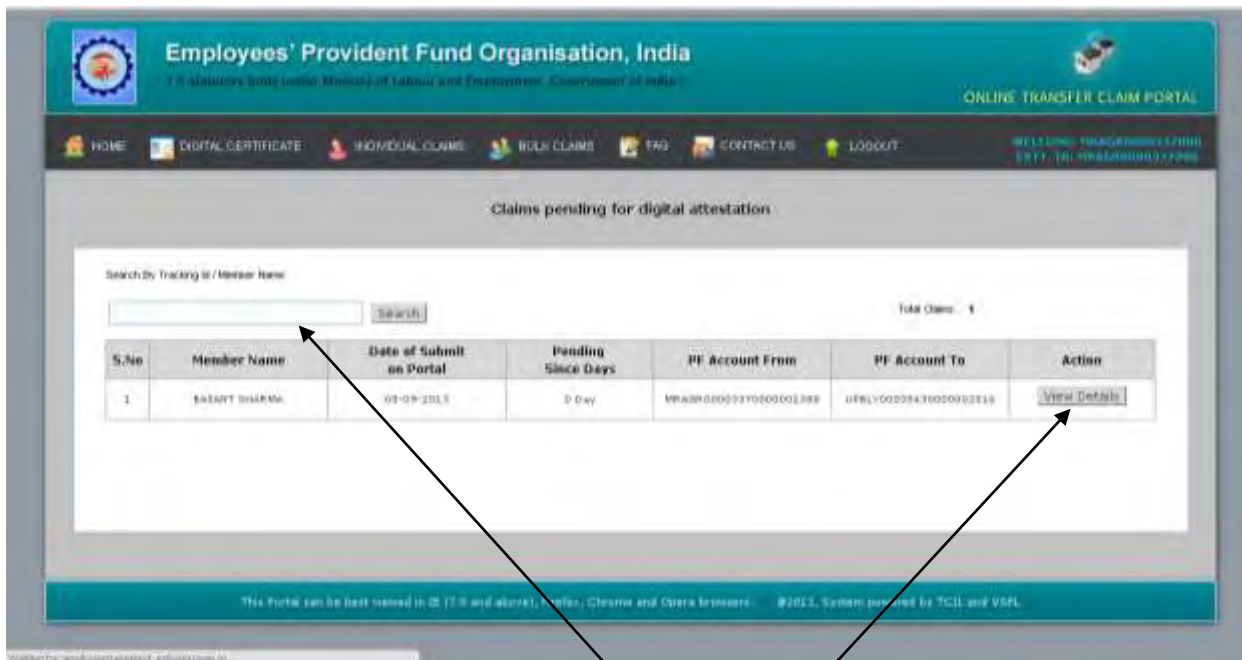


(IMPORTANT: Here it must be noted that the details available in the process flow have been entered only for the testing of the application and has been reproduced for demonstration purpose only.)

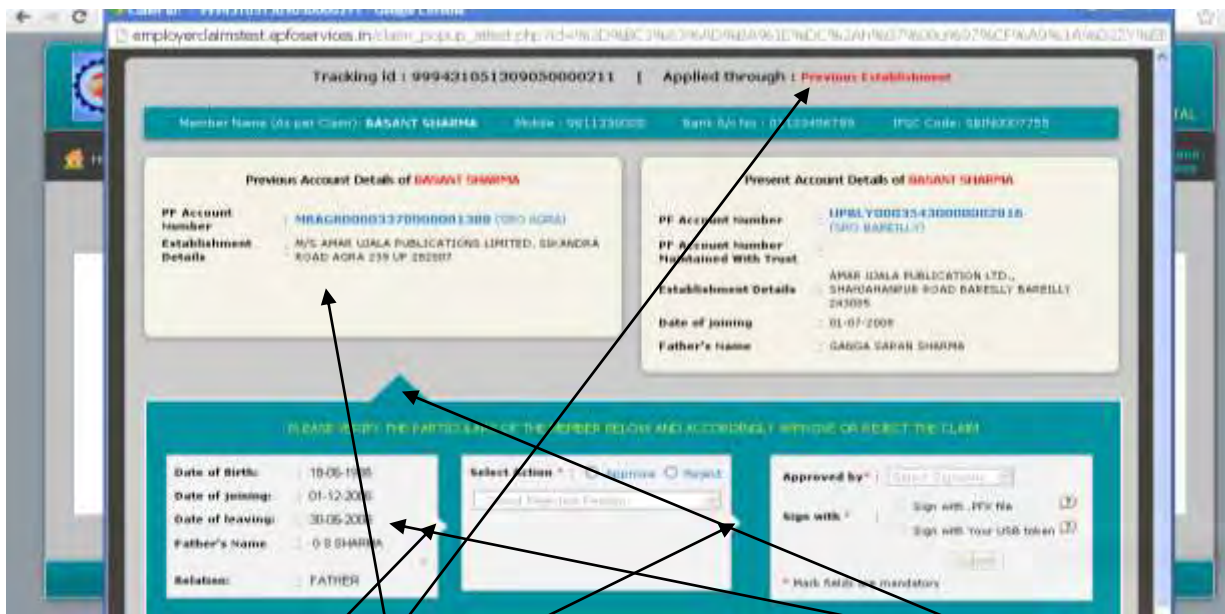
On the menu bar, place cursor on tab **“Individual Claims”**. Four options would be displayed:

- 1) Claims pending for Digital Attestation
- 2) Claims pending for Verification
- 3) Non-actionable claims
- 4) History of Approved/Rejected claims

Click on **“Claims pending for Digital Attestation”** to view claims submitted by members through online mode. The following screen would appear:

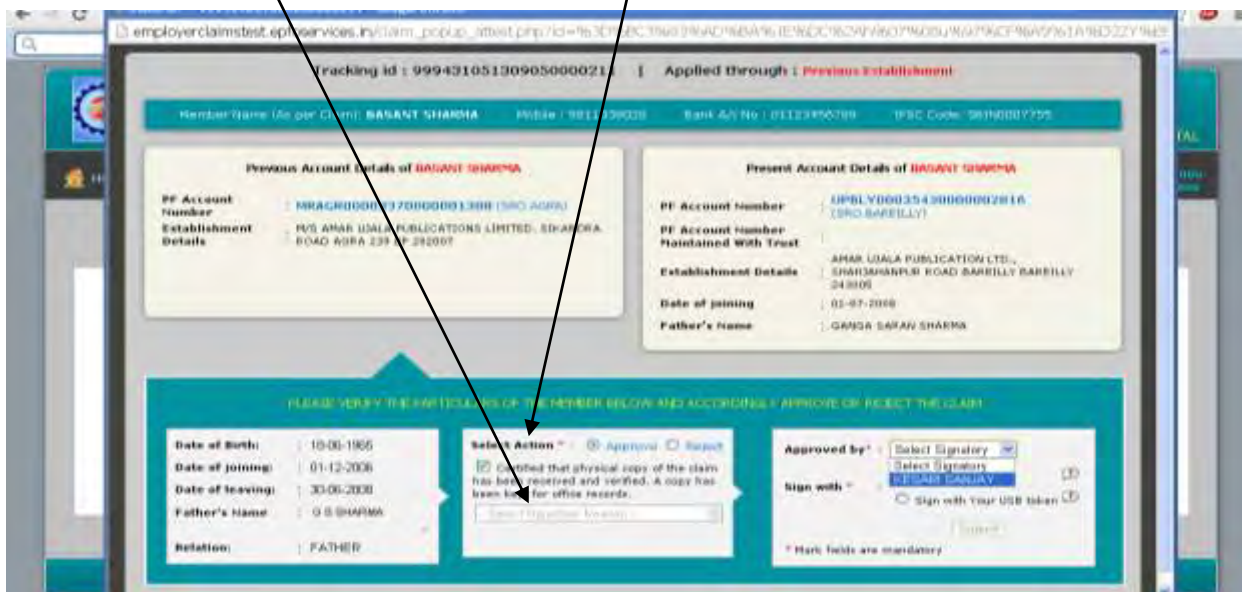


The claim can be searched by enter Tracking ID and or Member Name here. To view/attest/reject the details of the claim, click on **“View details”**. The following screen would appear:



Depending on the employer opted to apply the claim through, the member details would be available for verification and accordingly the claim can be attested or rejected. The indicator shows the details chosen (pertaining to previous or present account) for verification of details. The small arrows indicate the flow of the approval/ rejection process.

The employer can verify or edit only the details entered by the member (available in the box). The details populated from EPFO database cannot be edited by the employer. After verification, the employer has an option to reject or approve the claim. In case of rejection, the “Select Rejection Reason” would get enabled and the employer has to select one of the reasons for the rejection of the claim as shown in the screen shown below.



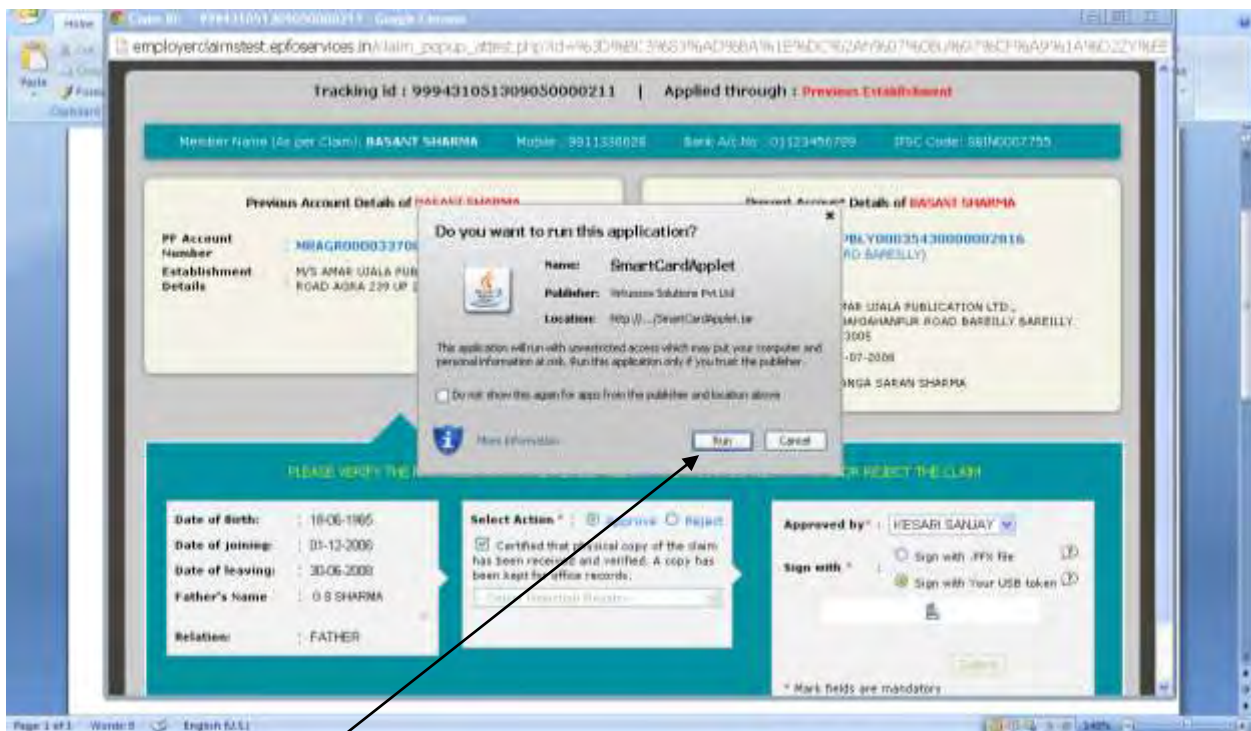
For rejection of the claim, the authorized signatory has to reject the claim using his digital signature. The process for the rejection of the claim thereafter, is same as that of approval of claim which has been explained in next few pages.

To approve the claim, the approve button is to be selected. Further the check button is to be clicked to certify that physical copy of the claim has been received and verified. The same has been kept for office record.

The screenshot displays the 'employerclaimstest.epfoservices.in/claim_poc...test' interface. At the top, it shows 'Tracking id : 99943105130900000211' and 'Applied through : Previous Establishment'. Below this, member details for BASANT SHARMA are listed, including PAN, Bank A/c No, and EPIC Code. The interface is divided into two main sections: 'Previous Account Details of BASANT SHARMA' and 'Present Account Details of BASANT SHARMA'. The 'Previous Account Details' section includes PF Account Number (MRAGR00003970000001300 (SRO AGRA)), Establishment Details (M/S AMAR USALA PUBLICATIONS LIMITED, SIKARORA, ROAD AGRA 335 107), Date of joining (01-12-2006), and Date of leaving (30-06-2008). The 'Present Account Details' section includes PF Account Number (UPBLV00035430000002816 (SRO BAREILLY)), PF Account Number Maintained With Trust, Establishment Details (AMAR USALA PUBLICATION LTD., SHARSHANPUR ROAD BAREILLY BAREILLY 243005), Date of joining (01-07-2008), and Father's Name (GANDU SARAN SHARMA). Below these sections, a form titled 'PLEASE VERIFY THE PARTICULARS OF THE MEMBER BELOW AND ACCORDINGLY APPROVE OR REJECT THE CLAIM' is visible. It contains fields for Date of Birth (10-08-1965), Date of joining (01-12-2006), Date of leaving (30-06-2008), Father's Name (G S SHARMA), and Relation (FATHER). The 'Select Action' section has radio buttons for 'Approve' (selected) and 'Reject', and a checkbox for 'Certified that physical copy of the claim has been received and verified. A copy has been kept for office records.' The 'Approved by' section has a dropdown menu for 'Select Signatory' with 'VEDANT GARGAV' selected, and a 'Sign with' section with radio buttons for 'Sign with .PFX' (selected) and 'Sign with Your USB token'. A 'Submit' button is at the bottom right.

On clicking the "Select Signatory", the list of all authorized signatories of the establishment would be available and the authorized signatory has to select his name. Thereafter the option to sign with .PFX or USB token is to be selected depending upon the type of Digital Signature Certificate registered with EPFO in respect of the authorized signatory.

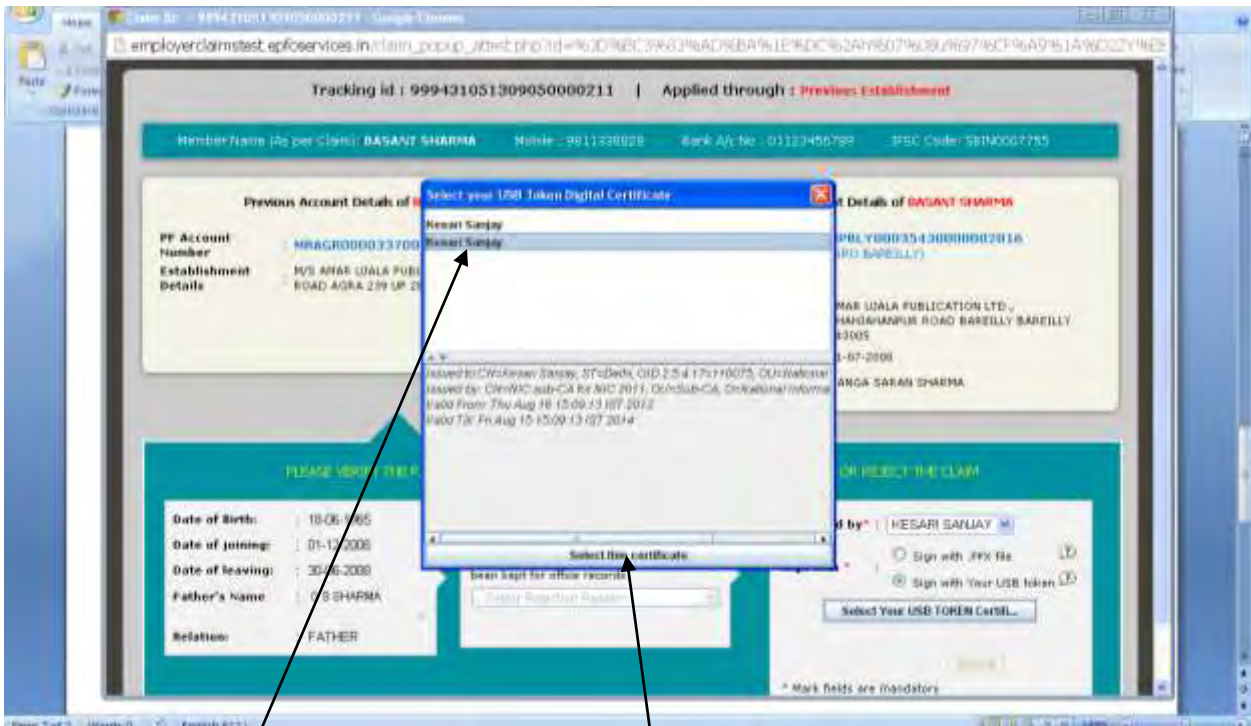
Following screen would appear:



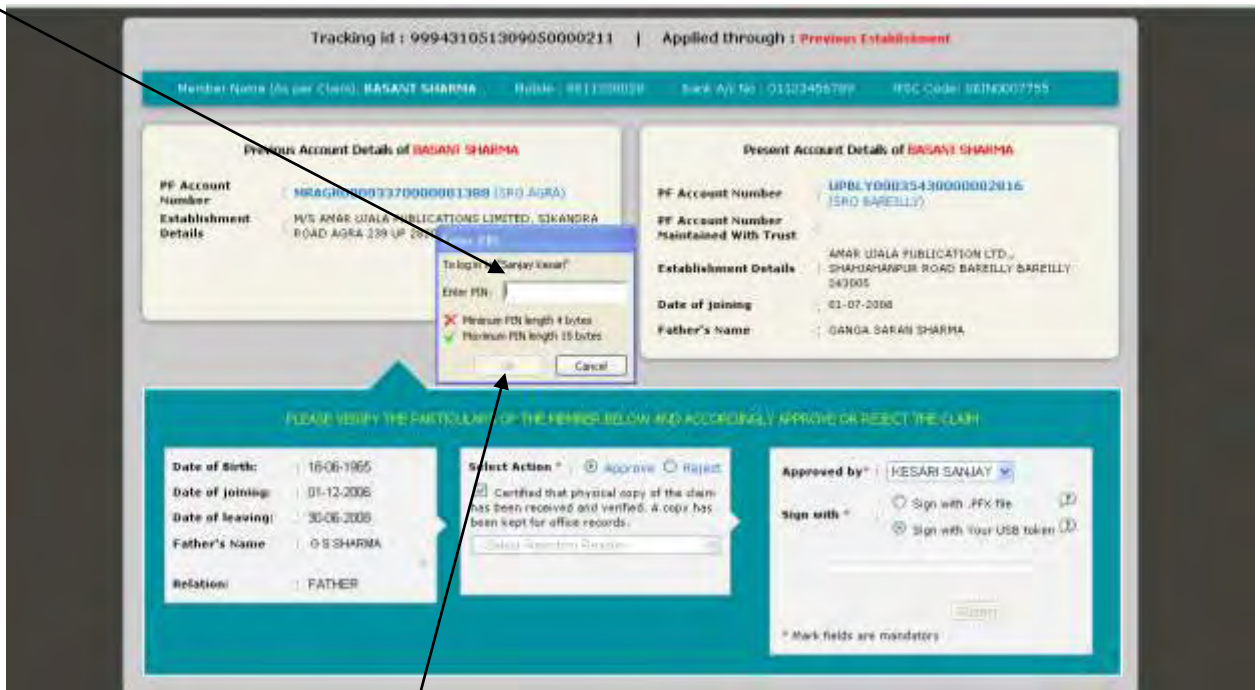
Click on the “Run” Button. Following screen would appear:



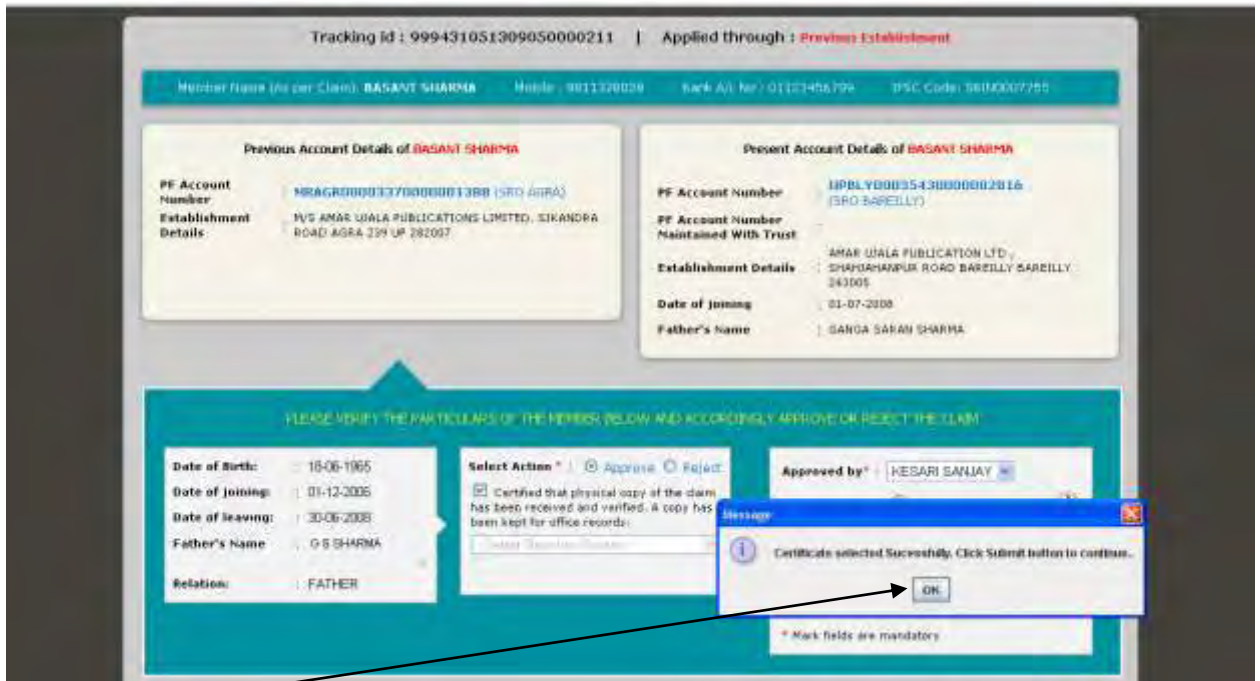
Thereafter click on the “Select your USB Token certificate” (In case the “Sign with your USB token” has been selected). The following screen would appear:



Select the certificate and click on "Select this certificate". The system would ask for the PIN as follows:

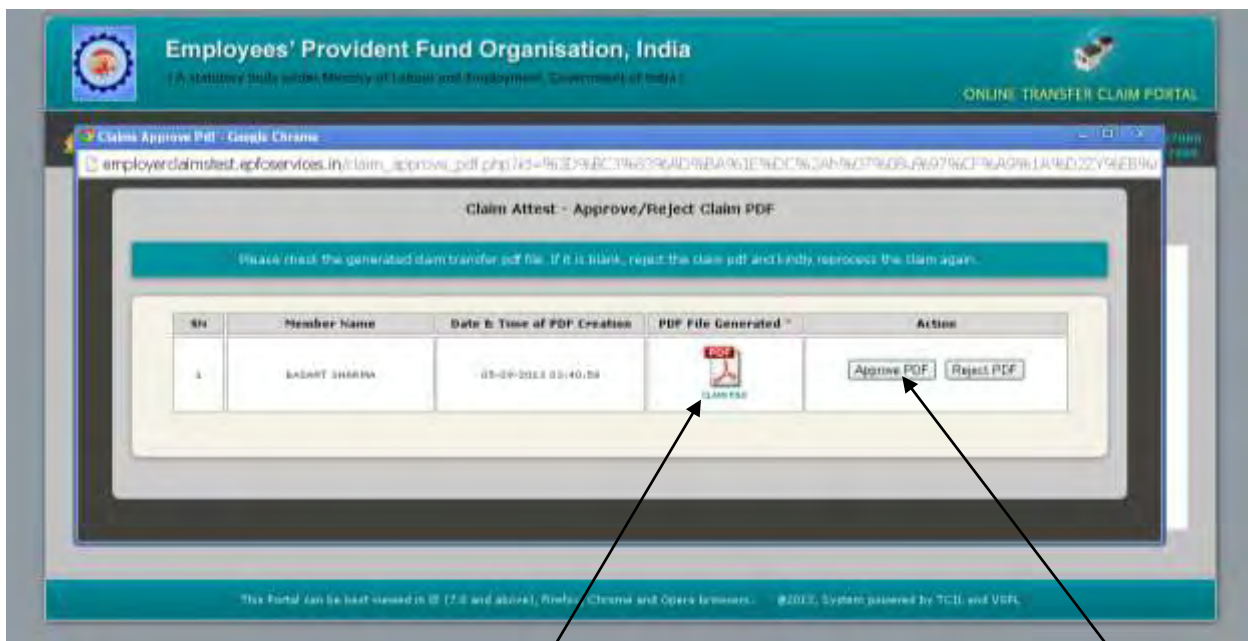


On entering PIN and clicking "OK", the following message would appear:



Click "OK" button. The submit button would be enabled. Click on the "Submit" button.

The following screen would appear:



Please download the PDF of claim file generated, verify the details and click on "Approve PDF" to complete the process of digital attestation of the claim. Following screen would appear:

Employees' Provident Fund Organisation, India
 (A Statutory Body under Ministry of Labour and Employment, Government of India)

ONLINE TRANSFER CLAIM PORTAL

HOME DIGITAL CERTIFICATE INDIVIDUAL CLAIMS BULK CLAIMS FAQ CONTACT US LOGOUT

Claims pending for digital attestation

Search By Tracking Id / Member Name

Search

Total Claims: 0

S.No	Member Name	Date of Submit on Portal	Pending Since Days	PF Account From	PF Account To	Action
No claims pending for digital attestation						

This Portal can be best viewed in IE (7.0 and above), Firefox, Chrome and Opera browsers. ©2013, System powered by TCL and USPL

The claim would not be there in the list of claims pending for digital attestation. The employer can see the attested/rejected claim details in the “**History of Approved/Rejected Claims**” options under the tab “**Individual Claims**”.