



कर्मचारी भविष्य निधि संगठन
EMPLOYEES' PROVIDENT FUND ORGANISATION
श्रम एवं रोजगार मंत्रालय, भारत सरकार
MINISTRY OF LABOUR & EMPLOYMENT, GOVERNMENT OF INDIA
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To,

All Addl. CPFCs, Zonal Offices

All RPFs/OICs, Regional offices

Sub: Assistance to members/beneficiaries in filing Pension claims at PRO - Reg.

Madam/Sir,

While EPFO has moved towards online claim filing and speedier settlement of claims, there is urgent need to focus on getting the claims complete in all form, from the members, on due basis.

2. To attain this objective a dashboard for Pension as well as EDLI & PF (death cases), on due basis, has already been provided so that ROs may take these cases up with the employers and the employees for getting the claims.

3. Apart from the target of receiving the claims on due basis there is another important target of reducing the rejections. Needless to say that rejections not only cause grievances from members/beneficiaries but also results into lot of man hours being wasted on unproductive work.

4. It has been found that claims are rejected many a time due to reasons which can be avoided by guiding the members in filing claims, educating them about the reasons which causes rejection and facilitating them in fulfilling the requirements of a claim form.

5. Therefore, since PRO is the interface between the Field Office and its members/ beneficiaries, its role in guiding and educating members/ beneficiaries is of utmost importance. ROs are therefore, advised to strengthen their PRO and undertake following activities:

- i. For the information of members/ beneficiaries the checklist of requirements while filing claim should be displayed in PRO prominently.
- ii. Specialized Desk shall be created in PRO by suitably posting Dealing Assistants for providing assistance to members/beneficiaries in online claim filing.
- iii. Efforts shall be taken to obtain claims online as much as possible. However, in cases where online filing of claim may not be possible, Dealing Assistant

at PRO will examine the physically submitted claim before registering it and shall inform to the member/ beneficiary all the deficiencies in the claim form in one go.

- iv. Any issues related to transfer of accounts or correction in member profile should be informed to the members/beneficiaries after scrutiny of claim form so that rejection of claims on such grounds can be avoided.
- v. For cases where exit is prior to introduction of compulsory UAN, field offices shall proactively generate the UAN and link the same with the Aadhaar. No physical claim shall be returned or rejected on ground of this requirement only.

6. It shall be the responsibility of the PRO that all the deficiencies are conveyed to the member/ beneficiary in one instance and claim is not returned or rejected once submitted after rectifying all the deficiencies.

7. RPFCs/OICs shall be responsible for ensuring that claims in received in physical forms are either got converted into online forms by providing necessary support in PRO as detailed above or where it may not be possible, entered into the system by the RO with a target of getting it settled.

8. Addl. CPFCs, Zonal Offices shall also regularly monitor the functioning of PROs in ROs under their jurisdiction so that the online filing of claims increases and rejection of claims by the Field Offices is reduced.

[Issues with approval of ACC-HQ (Pension)]

Yours faithfully,


(Aprajita Jaggi)

Addl. Central P.F. Commissioner (Pension)

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