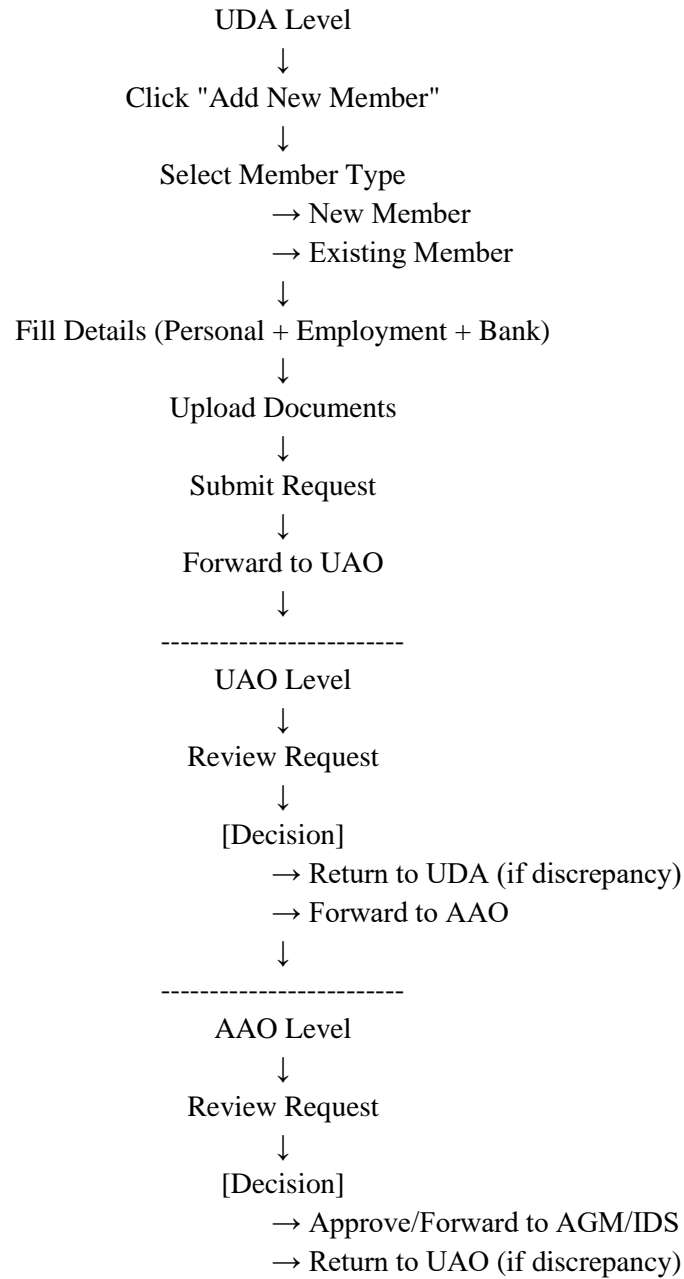


## PROCESS FLOW TO ADD MEMBER MASTER DATA



## DETAILED PROCEDURE TO ADD MEMBER MASTER DATA

### 1. UDA (Unit Dealing Assistant)

#### 1.1 General Instruction

Under UDA login, a request for creation of **Member Master Data** can be initiated for:

- **New Member** → New joinee (CMPF Account Number will be generated)
- **Existing Member** → Member already having CMPF Account Number (issued offline)

#### 1.2 Access & Monitoring

- Navigate to **Add New Member**
- Tabs available:
  - **Submitted Tab** → Requests pending with higher officers
  - **Returned Tab** → Requests sent back for correction
  - **Approved Tab** → Successfully approved requests

#### 1.3 Initiate Member Creation

- Click **Add New Member Button**
- System displays **Member Registration Form**

#### 1.4 Select Member Type

- **New Member**
  - Enter complete details
  - CMPF Account Number will be **auto-generated**
- **Existing Member**
  - Enter existing CMPF Account Number
  - Fill remaining details

#### 1.5 Enter Member Details

Fill the following:

- Personal Details
- Employment Details
- Bank Details (PF & Pension)

#### 1.6 Document Upload

- Upload all **required supporting documents**

#### 1.7 Submission

- Click **Submit**
- System behavior:
  - If data is correct → Request forwarded to UAO
  - If error → Alert displayed for correction

### 2. UAO (Unit Authorised Officer)

#### 2.1 Tabs Available

- **Received** → New requests from UDA
- **Processed** → Forwarded to AAO
- **Returned** → Sent back to UDA
- **Approved** → Final approved cases

#### 2.2 Verification Process

- Click **Ack ID**
- Verify:
  - Employment details
  - Bank details (PF & Pension)
  - Uploaded documents

### **2.3 Decision at UAO**

- **Forward to AAO** (select AAO from dropdown)
- **Return to UDA** (if discrepancies found)

### **3. AAO (Area Authorised Officer)**

#### **3.1 Tabs Available**

- **Received**
- **Processed**
- **Returned**
- **Approved**

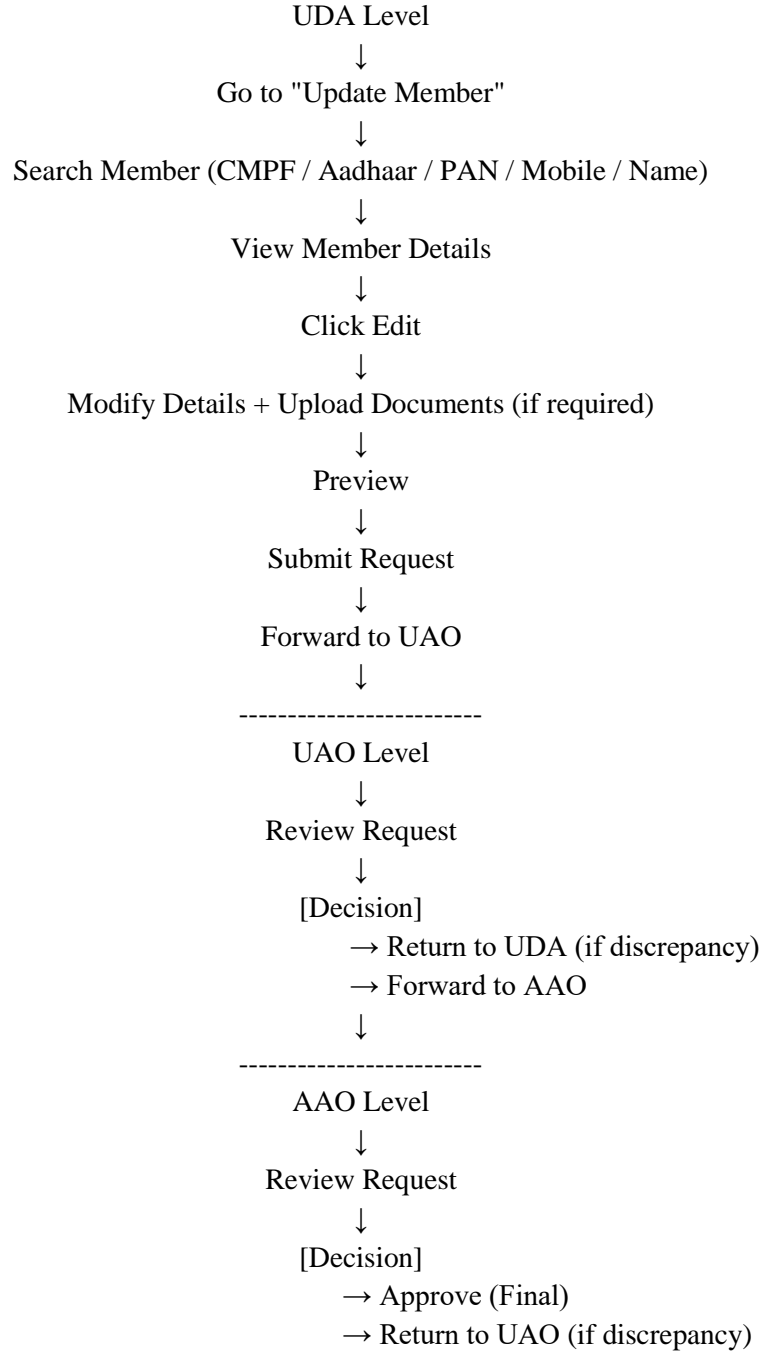
#### **3.2 Verification Process**

- **Click Ack ID**
- **Review:**
  - Employment details
  - Bank details
  - Supporting documents

#### **3.3 Decision at AAO**

- **Approve** → Final approval of member creation
- **Return to UAO** → If discrepancies found

## PROCESS FLOW TO UPDATE MEMBER MASTER DATA



## DETAILED PROCEDURE TO UPDATE MEMBER MASTER DATA

### 1. UDA (Unit Dealing Assistant)

#### 1.1 General Instruction

After successful creation of member data, any subsequent changes/updates in the **Member Master Data** shall be carried out using the **Update Member** option.

#### 1.2 Access & Tracking

- Navigate to **Update Member**
- Tabs available:
  - **Submitted Tab** → Requests sent to UAO for approval
  - **Returned Tab** → Requests sent back for correction

#### 1.3 Search Member

The UDA can search the member using:

- CMPF Account Number
- Aadhaar Number
- PAN
- Mobile Number
- Name

#### 1.4 View Member Details

- After search, member details are displayed
- Options available:
  - **View Icon**
  - **Edit Icon**

#### 1.5 Update Member Details

- Click **Edit Icon**
- Modify required fields in the member profile

#### 1.6 Preview & Submission

- Click **Preview** to verify changes
- Click **Submit**
- Select **UAO officer** from dropdown
- System displays “**Successful**” message

### 2. UAO (Unit Authorised Officer)

#### 2.1 Tabs Available

- **Received** → New requests from UDA
- **Processed** → Forwarded to AAO
- **Returned** → Sent back to UDA

#### 2.2 Verification Process

- Click **Upd Req Ack ID**
- Verify:
  - Member personal details
  - Employment details
  - Bank details (PF & Pension)
  - Old vs Updated values
  - Uploaded documents
  - Remarks

#### 2.3 Decision at UAO

- **Forward to AAO** (select AAO from dropdown)
- **Return to UDA** (if discrepancies found)

### **3. AAO (Area Authorised Officer)**

#### **3.1 Tabs Available**

- **Received**
- **Processed**
- **Returned**

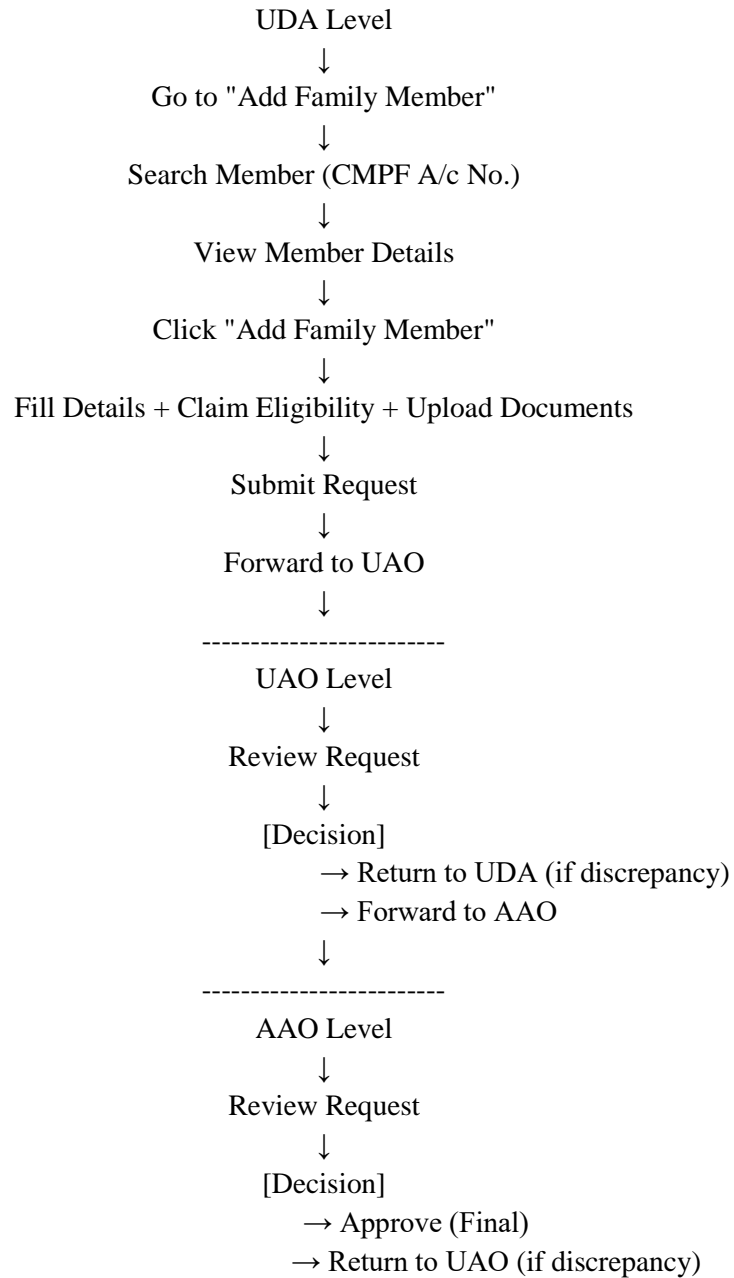
#### **3.2 Verification Process**

- Click **Upd Req Ack ID**
- Review:
  - Employment details
  - Bank details (PF & Pension)
  - Updated member information
  - Supporting documents

#### **3.3 Decision at AAO**

- **Approve** → Final approval of update
- **Return to UAO** → If discrepancies found

## PROCESS FLOW TO ADD FAMILY MEMBER MASTER DATA



## DETAILED PROCEDURE –ADD FAMILY MEMBER MASTER DATA

### 1. UDA (Unit Dealing Assistant)

#### 1.1 Access & Monitoring

- Navigate to **Add Family Member**
- Tabs available:
  - **Submitted Tab** → Requests pending with UAO
  - **Returned Tab** → Requests sent back for correction

#### 1.2 Add New Family Member

##### Step 1: Initiate Request

- Click **Add Button**
- Search member using **CMPF Account Number**

##### Step 2: View Member Details

- On search, member details will be displayed
- Click **Add Family Member Button**

##### Step 3: Fill Details

- Enter:
  - Family member details
  - Claim eligibility information
- Upload **supporting documents**

##### Step 4: Submission

- Click **Submit**
- Request is forwarded to **UAO for approval**

### 2. UAO (Unit Authorized Officer)

#### 2.1 Tabs Available

- **Received** → New requests from UDA
- **Processed** → Forwarded to AAO
- **Returned** → Sent back to UDA

#### 2.2 Verification Process

- Click **Req Ack ID**
- Verify:
  - Member details
  - New family member details
  - Claim eligibility
  - Uploaded documents

#### 2.3 Decision at UAO

- **Forward to AAO** (after selecting AAO from dropdown)
- **Return to UDA** (if discrepancies found)

### 3. AAO (Area Authorized Officer)

#### 3.1 Tabs Available

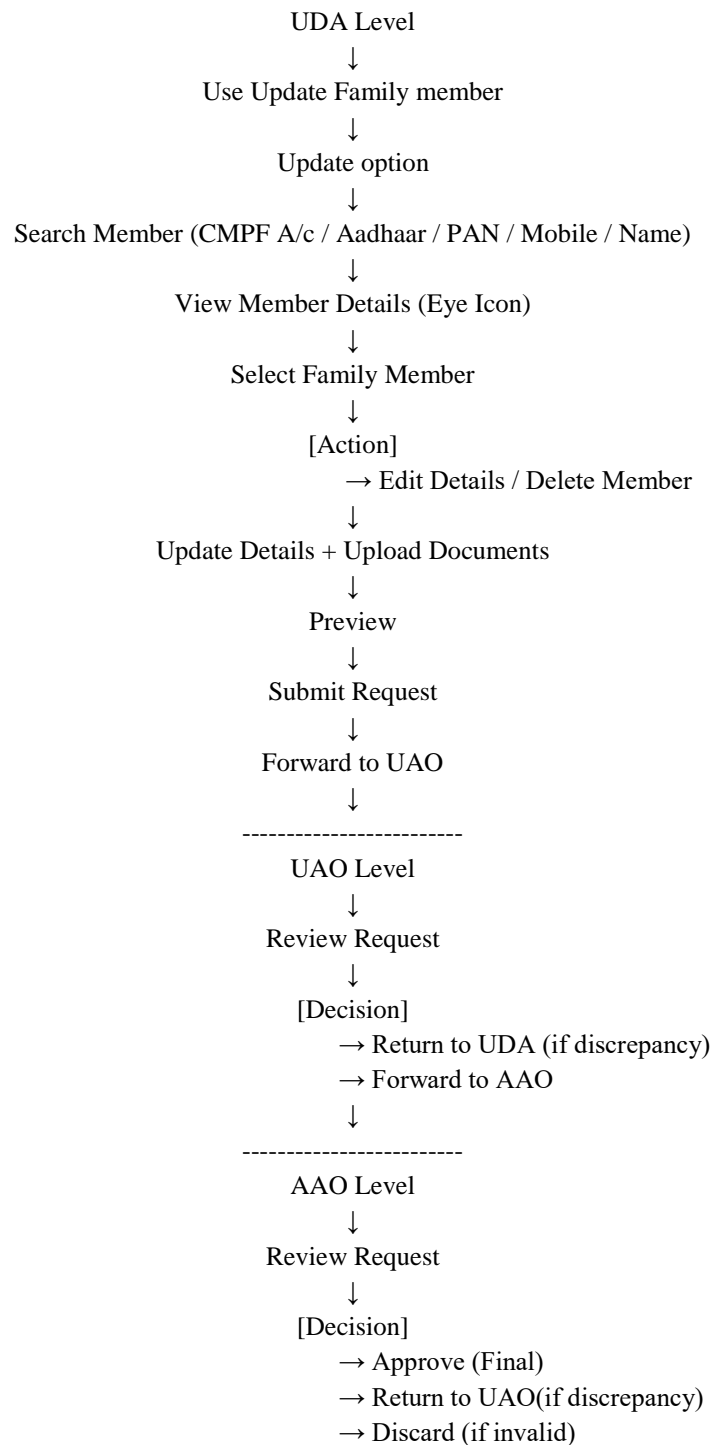
- **Received**
- **Approved**
- **Returned**

#### 3.2 Verification Process

- Click **Upd Req Ack ID**
- Review:
  - Member details
  - Newly added family member details
  - Claim eligibility
  - Uploaded documents

### **3.3 Decision at AAO**

- **Approve** → Final approval
- **Return to UAO** → If discrepancies found

**PROCESS FLOW TO UPDATE FAMILY MEMBER MASTER DATA**

## DETAILED PROCEDURE –UPDATE FAMILY MEMBER MASTER DATA

### 1. UDA (Unit Dealing Assistant)

#### 1.1 Access & Tracking

- Navigate to **Update Family Member option**
- Use:
  - **Submitted Tab** → Requests sent to UAO
  - **Returned Tab** → Requests sent back for correction

#### 1.2 Important Restriction

- If **claims are under process**, update is **not allowed**
- System will display error message

#### 1.3 Use Update option & Search Member

Search using:

- CMPF Account Number
- Aadhaar
- PAN
- Mobile Number
- Name

#### 1.4 View & Select Family Member

- Click **Eye Icon** → view details
- Select required family member

#### 1.5 Actions Available

##### **Edit:**

- Click **Edit Icon**
- Modify:
  - Family details
  - Nominee details
  - Claim eligibility
- Upload supporting documents

##### **Delete:**

- Click **Delete Icon**
- Mandatory:
  - Upload documents
  - Enter remarks

#### 1.6 Preview & Submission

- Click **Preview**
- Verify details
- Click **Submit**

⇒  System forwards request to **UAO**

### 2. UAO (Unit Authorized Officer)

#### 2.1 Tabs Available

- **Received** → New requests
- **Processed** → Forwarded to AAO
- **Returned** → Sent back to UDA

#### 2.2 Review Process

- Click **Upd Req Ack ID**
- Verify:
  - Member details
  - Old vs New values
  - Uploaded documents
  - Remarks

### **2.3 Decision at UAO**

- **Forward to AAO**
- **Return to UDA** (if discrepancy)

## **3. AAO (Area Authorized Officer)**

### **3.1 Tabs Available**

- **Received**
- **Approved**
- **Returned**

### **3.2 Review Process**

- Click **Upd Req Ack ID**
- Verify:
  - Updated family details
  - Supporting documents

### **3.3 Decision at AAO**

- **Approve** → Final approval
- **Return to UAO** (if discrepancy)
- **Discard** (if invalid request)