

SBI Pension Funds Private Limited



SBI PENSION FUNDS (P) LTD.

Standard Operating Procedure for Subscribers For

Aadhaar Offline e-KYC based PRAN generation



The SBI Pension Funds Private Limited module being offered to Subscribers is an online portal where a Subscriber can register online and make contribution. A link is displayed on SBI Pension Funds Private Limited website for opening NPS account. After clicking on the Open NPS A/c, Subscriber will be redirected to NSDL NPS application for registration. The process of PRAN generation is Aadhaar Offline e-KYC based wherein the Subscriber authenticates himself/herself through AADHAR. Subscriber needs to have his\her mobile number updated in the UIDAI database. The basic details of the subscriber (Name, Date of birth and address) are fetched from the UIDAI database and rest of the details (bank details, nomination, scheme preference and personal details) are to be filled by the Subscriber.

Pre-requisite for generation of PRAN:

- a. A mobile update in UIDAI database.
- b. Aadhaar Offline e-KYC XML file (It will be Zip file). If not available the same can be downloaded from UIDAI website
- c. Scanned copy of PAN card and Cancelled Cheque in *.jpeg/ *.jpg/ *.png format having file size between 4KB 2MB
- d. Scanned of Signature in *.jpeg/ *.jpg/ *.png format having file size between 4KB 5MB

A brief journey for registration of Corporate Subscriber is mentioned below:

- a. Subscriber is required to enter mobile no., upload the Aadhaar e-KYC XML zip file and enter the share code.
- b. If the subscriber does not have the Aadhaar XML file, the subscriber is provided with the link re-directing them to the UIDAI portal to download the XML data packet along with the share code. It hardly takes a minute to download the XML data packet.
- c. Enter first three alphabets of the corporate office name. A list of corporate offices will be displayed after entering first three alphabets. Select your office name from the list displayed. Please ensure the correct employer is selected as the employment details entered by you is sent for verification to the respective office selected by you.
- d. The basic KYC details i.e. Name of Subscriber, DOB (Date of Birth), Gender, Address and Photo will be fetched from UIDAI database.
- e. Other mandatory details i.e., Personal details, FATCA details, Nomination details, Employment details and Scheme Preference details are to be filled by subscriber. If

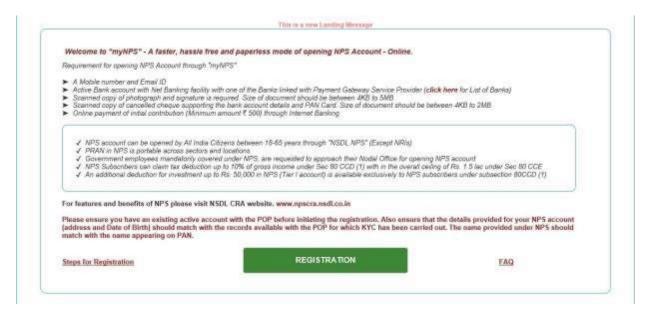


- Scheme Preference details selection option is made by your Corporate (employer), then Scheme Preference will be auto populated.
- f. After filling all the details, subscriber is required to upload scanned copy of Cancelled cheque, PAN card and scan of signature. Please refer to the specifications available on screen while uploading the documents.
- g. A PRAN will be immediately generated without making Payment. The PRAN however will be kept in "Freeze" status till the selected employer carries out the employment verification.
- h. After PRAN generation, he/she can e-Sign the form online through Aadhaar authentication (this process is completely paperless)
- i. After PRAN generation, the employment details will be sent online to your corporate office (employer) for verification.
- j. After successful employee details verification, the status of PRAN will be updated as Active. You can then start contributing to your PRAN.

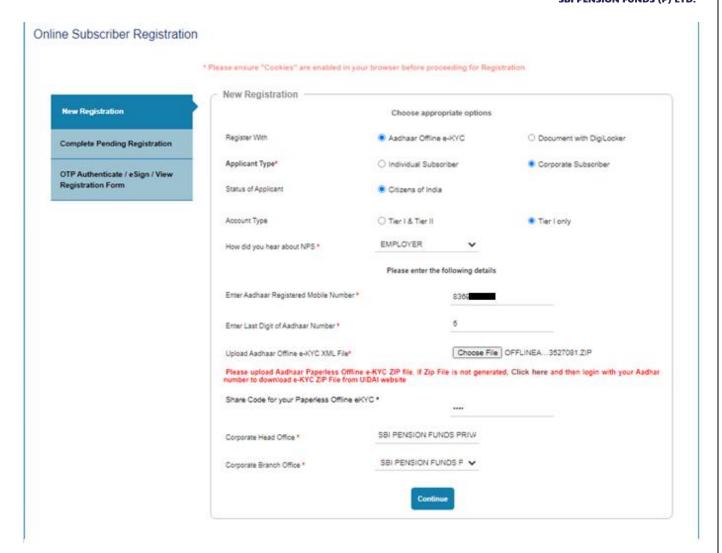


Step by Step guide for Corporate Subscriber Registration:

1. Click on the link available in SBI Pension Funds Private Limited website for Subscriber registration. You will be directed to Landing Page of NSDL NPS application as shown below. Brief "Steps for registration" and "FAQs" are available on the Landing page for your quick reference. Please ensure you have gone through the pre-requisites for account opening to ensure a seamless experience. Please click "Registration" button.

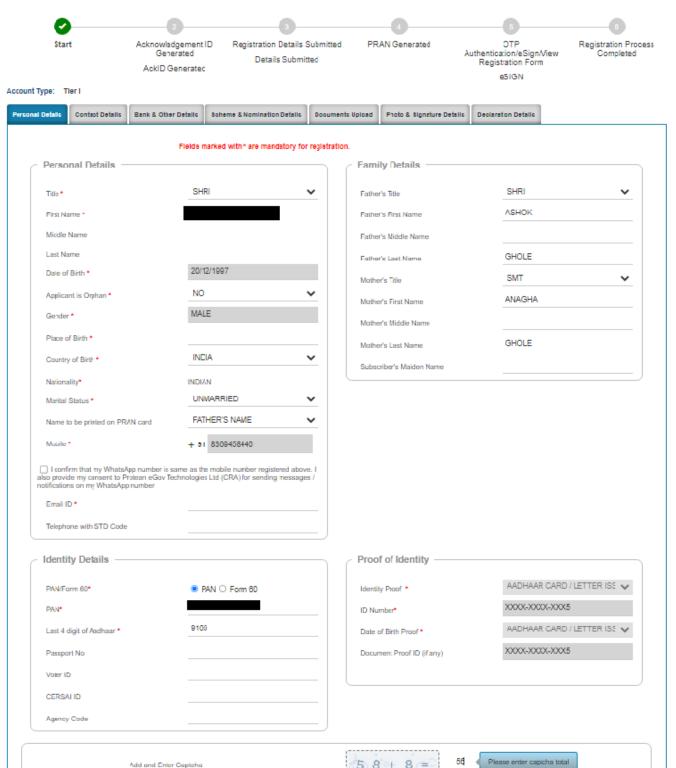


2. Screen as shown below will open. Please select the radio button represented as "Corporate Subscriber" for registration as a subscriber under your Corporate (employer) for NPS. After selecting Account Type, subscriber is required to enter the mobile number registered with UIDAI database, last digit of Aadhaar number, upload the XML file, Share code and corporate office name. In case you do not have the Aadhaar XML file, please click on the link re-directing to the UIDAI portal to download the XML data packet along with the share code. It hardly takes one minute to download the XML data packet. Enterfirst three alphabet of the Corporate Office name (employer) as registered under NPS. A list of corporate offices will be displayed after entering first three alphabet. Select your office name (employer) from the list displayed. Please ensure the correct employer is selected as the employment details entered by you is sent for verification to the respective office selected by you.

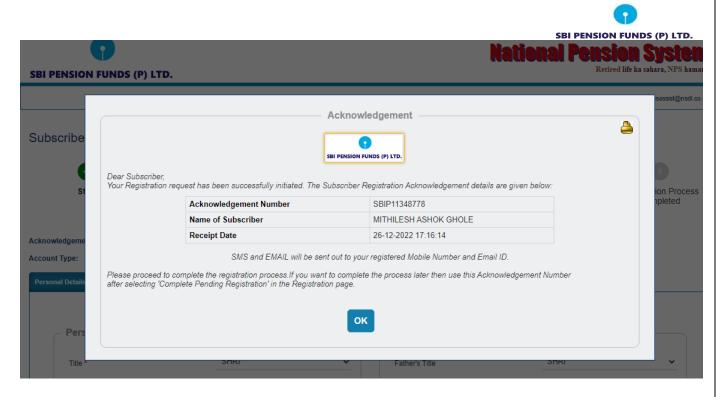


3. The basic details of the subscriber Name, DOB and Address) are fetched from the UIDAI database and rest of the details (bank details, nomination, scheme preference and personal details) is to be filled up by the subscriber. After filling all the personal details, click on "Generate Acknowledgement No."



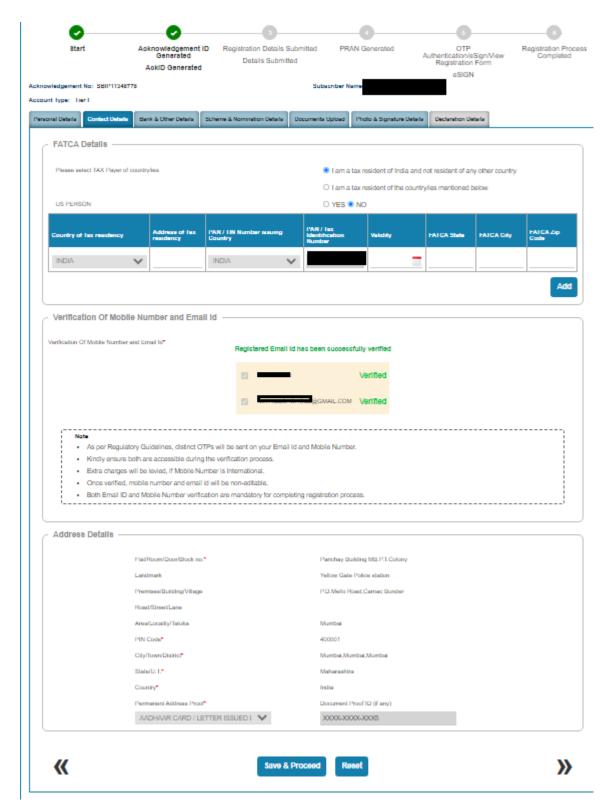


4. Acknowledgement number will be generated and the same will be sent to registered mobile no. and Email ID.



5. After clicking on "Ok", Subscriber will be directed to fill up contact details. He is required to fill FATCA details and address will be fetched and populated from UIDAI database.

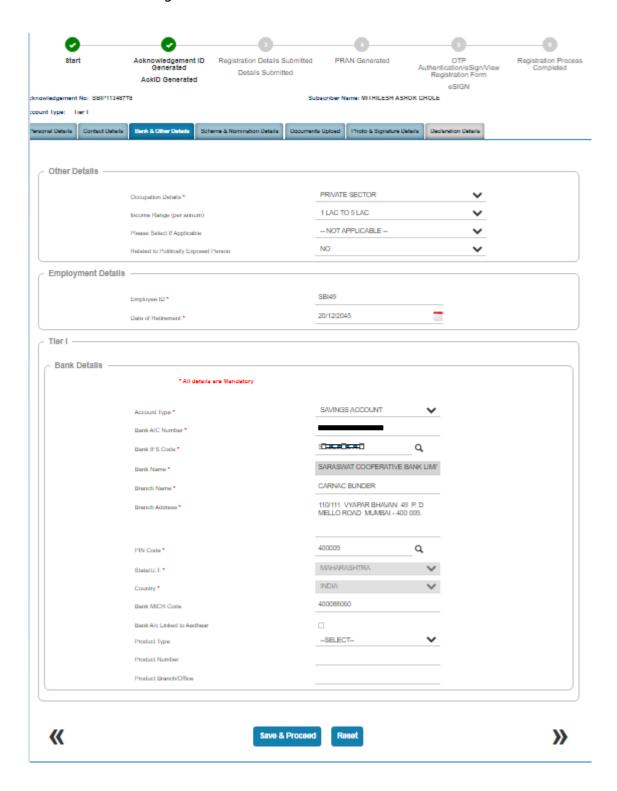




6. As a next step, subscriber is required to fill Employment details and Bank details as shown in below screenshot. The employee verification will be done online by your

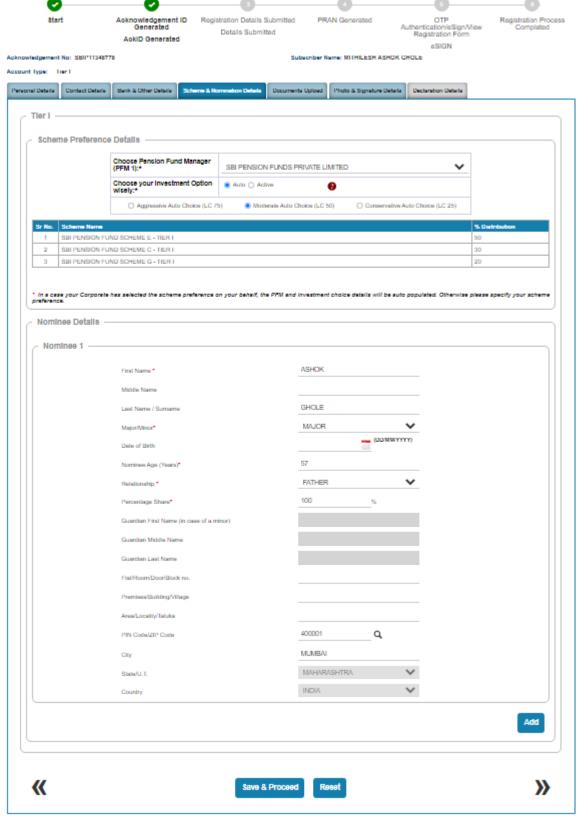


Corporate office (employer) on the basis of employment details entered by Subscriber. After entering correct details, click on "Save & Proceed".





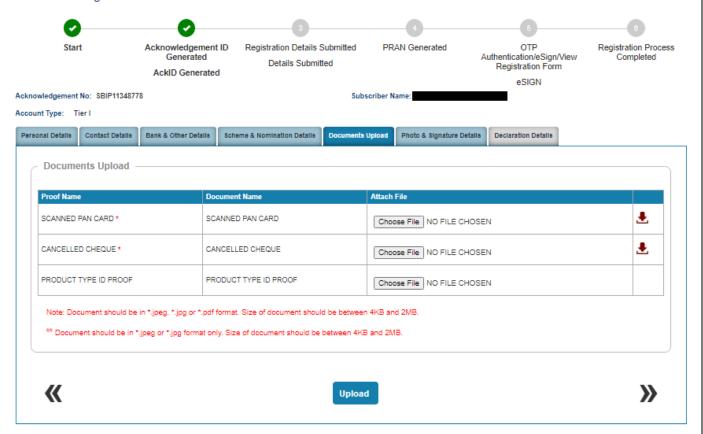
7. After clicking on Save and Proceed, please enter Scheme Preference details and Nominee details. Please note that if Scheme Preference details selection option is at Corporate level, then Scheme Preference will be auto populated.



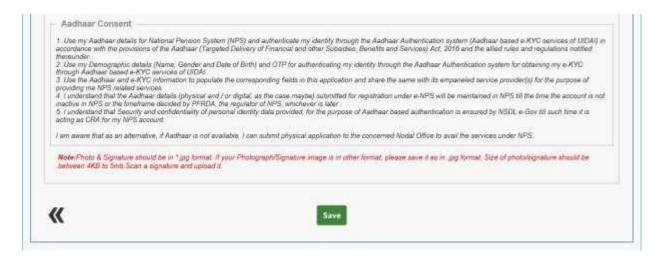


8. Further, you are required to upload scan copy of "PAN Card" and "Cancelled Cheque". Please note that scanned copy of PAN card and Cancelled cheque is compulsory for Tier I registration as well as for combined Tier I & Tier II registration. Please adhere to the specifications (size and type) of the documents provided on-screen.

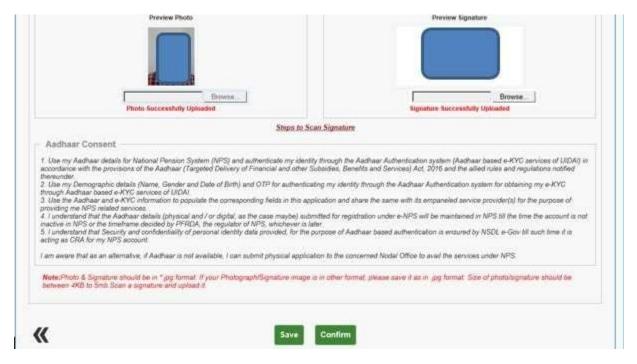
Subscriber Registration



9. After clicking on "Upload", your photograph is fetched from the UIDAI database. You are required to upload the scan image of signature and then click on "Save" button. Please adhere to the specifications (size and type) of the images provided on-screen.



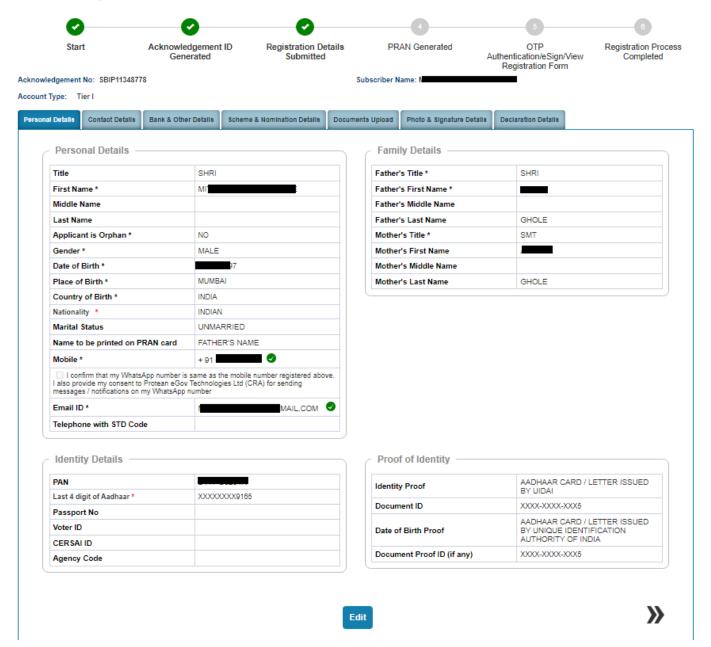
10. Please re-verify the Photo and signature and then click on "Confirm".

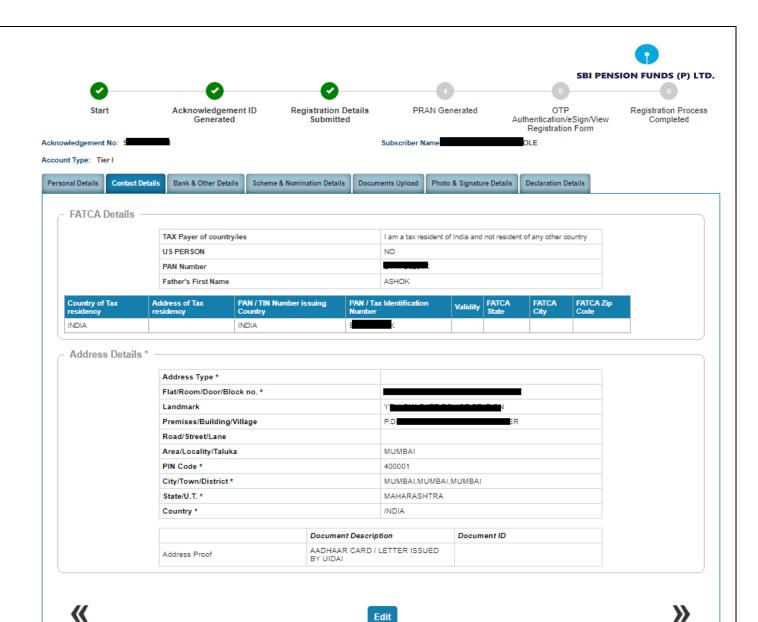


11. After clicking on "Confirm", system will display all the details which are entered under "Personal details, Contact details, Bank details, Nomination details, Scheme Preference, Documents and Photo Signature for reverification. If there is any issue with the details entered, then you can click on "Edit" button and rectify the details. Once the details are verified, click on "Proceed".



Subscriber Registration

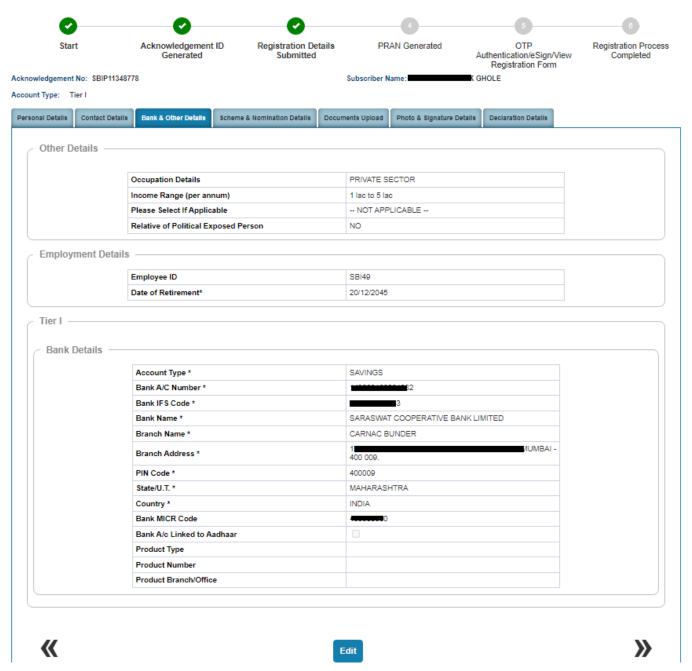




Edit



Subscriber Registration



Acknowledgement No: SBIP11348778

Subscriber Name:

Account Type: Tier I

reonal Detalle	Contact Details	Bank & Other Details	Scheme & Nor	mination Details	Documents Upload	Photo & Signature (Details Declaration Details
Tier I —							
Schem	e Preference	Details ———					
		Choose Pension Fun	d Manager (Pf	M 1):*	SBI PENSI	ON FUNDS PRIVATE L	IMITED
		Choose your Investm	ent Option wi	sely:*	Auto		
		Choose your Investm	ent Option wi	sely:*	Moderate A	uto Choice (LC 50)	
			0.11			N D: 4 7 4:	
			Sr No.	Scheme Name		% Distribution	
			1	SBI PENSION F	UND SCHEME E - TI	ER I 50.0	
			2	SBI PENSION F	FUND SCHEME C - TI	ER I 30.0	
			3	SBI PENSION F	UND SCHEME G - TI	ER I 20.0	

Nominee Details -

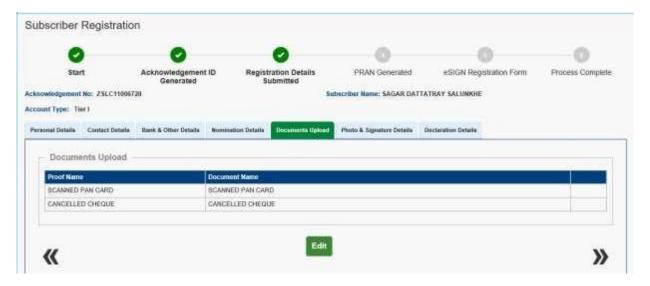
Nominee 1 -

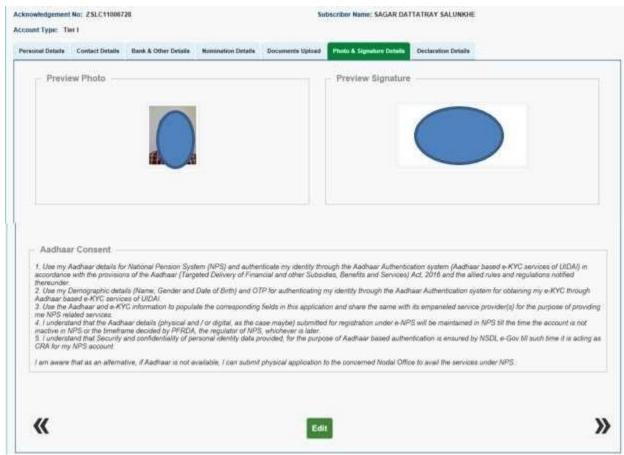
First Name *	ASHOK			
Middle Name				
Last Name / Surname	GHOLE			
Nominee Age (Years)	57			
Date of Birth				
Relationship *	FATHER			
Major/Minor *	Major			
Percentage Share *	100%			
Guardian First Name (in case of a minor) *				
Guardian Middle Name				
Guardian Last Name				
Flat/Room/Door/Block no.	101			
Premises/Building/Village	SAKINAKA			
Area/Locality/Taluka	KURLA			
PIN Code/ZIP Code	400001			
City	MUMBAI			
State/U.T.	MAHARASHTRA			
Country	INDIA			

Edit

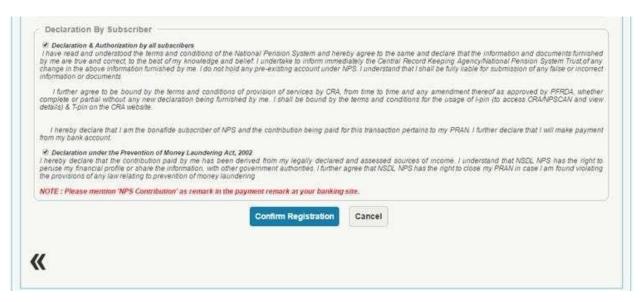








12. In order to proceed, you are required to tick on the declaration and then click on "Confirm Registration".





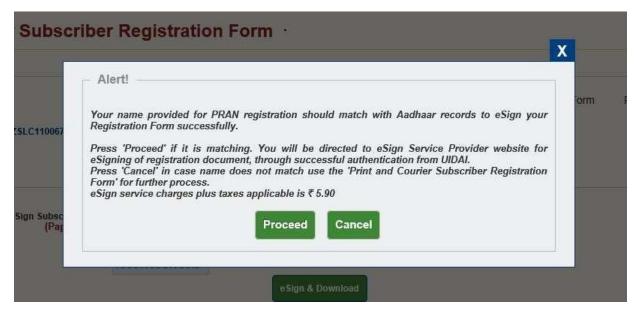
13. Post successful submission, PRAN will be generated for the subscriber. Please download and save the receipt for future reference. An Email intimation is also sent to the registered Email ID.





- 14. Post successful completion of PRAN generation, subscriber has two options.
 - a. This is a completely paperless process. Under this option, Subscriber can e-Sign the form. On successful completion of e-Sign process, subscriber need not submit the physical form. It is recommended to utilize this option to avoidinconvenience.





NSDL Electronic Signature Service ASP Name National Pension System Trust Transaction ID UKC:eSign:8362;20200429125332349 Date & Time 2020-04-29T12:53:37 I hereby authorize NSDL e-Governance Infrastructure Limited (NSDL e-Gov) to -1. Use my Aadhaar / Virtual ID details (as applicable) for the purpose of eSigning the registration document / service requests under National Pension System (NPS)/Atal Pension Yojana (APY) for/with National Pension System Trust and authenticate my identity through the Aadhaar Authentication system (Aadhaar based e-KYC services of UIDAI) in accordance with the provisions of the Aadhaar (Targeted Delivery of Financial and other Subsidies, Benefits and Services) Act, 2016 and the allied rules and regulations notified thereunder and for no other purpose. 2. Authenticate my Aadhaar / Virtual ID through OTP or Biometric for authenticating my identity through the Aadhaar Authentication system for obtaining my e-KYC through Aadhaar based e-KYC services of UIDAL and use my Photo and Demographic details (Name, Gender, Date of Birth and Address) for the purpose of eSigning the registration document / service requests under National Pension System (NPS)/Atal Pension Yojana (APY) for/with National Pension System Trust. 3. I understand that Security and confidentiality of personal identity data provided, for the purpose of Aadhaar based authentication is ensured by NSDL e-Gov and the data will be stored by NSDL e-Gov till such time as mentioned in guidelines from UTDAI from time to Send OTP 853307494080 VID/Aadhaar: Cick Here to generate Virtual ID. Download Instructions to generate Virtual ID in lieu of Aadhaar.

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