



(IS Division)
Employees' Provident Fund Organisation
Ministry of Labour
Govt. Of India

**Instruction Manual for
Form 31 (Para 68 BD)**



DOCUMENT UPDATE HISTORY

| S. No | Date of Submission / Change | Description | Document Version No. | TEAM |
|-------|-----------------------------|--------------------------|----------------------|---|
| 1. | 12-10-2017 | Draft version for review | 1.0 | Smt. Shanthi Sivaram, DD(IS), NDC Sh. Vikram Dattatri, AD(IS),NDC Sh. Sanjay Kunjam, AD(IS), NDC Sh. Arun Kumar, AD(IS), NDC Sh. NHVN CHANDRA SEKAAR, AD(IS) NDC Sh. Prince, DPA |



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

CLAIM >> Transaction > CLAIM RECEIPT ENTRY

Role : DA RECEIPT Last Login Date & Time : Jun 29, 2017 5:24 PM

[Click for CCF Claim Receipt Entry](#) [Exit](#)

Member Id

Member Id: RJ | KOT | 0000337 | 000 | 0055066

Establishment Name: SRI RAM FERTILISERS - CHEMICAL

Account Group Id: 102

Account Task Id: 10203

Member Name as Member Profile: HASIM KHAN UAN 100433014881 ACTIVATED

Member Name as per claim Form: HASIM KHAN

Mobile No: 9595959595

Claim Mode: SELECT

Form Type: FORM-31

Claimant Name: [Empty]

Scheme Para: PARA 68BD-Purchase/Repayment of EMI of Dwelling House/ Flat under 68BD

Remarks: [Empty]

Receipt Date: 29/06/2017

ENCLOSURES



Role : DA Account

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

Transaction

- ▶ EXEMPTED BULK TRANSFER
- ▶ FORM 10C - SCHEME CERTIFICATE / W_BENEFIT
- ▶ FORM 10C - SPECIAL
- ▶ FORM 10D - EPS 95
- ▶ FORM 13 - TRANSFER CLAIM (EXEMPTED)
- ▶ FORM 13 - TRANSFER CLAIM (UN-EXEMPTED)
- ▶ FORM 14 - LIP PAYMENT
- ▶ FORM 19 - PF CLAIM
- ▶ FORM 20 - PF DEATH CLAIM (SPECIAL)
- ▶ FORM 20 - PF DEATH CLAIM
- ▶ FORM 31 - ADVANCE (68BD)
- ▶ FORM 31 - ADVANCE
- ▶ FORM 5IF - EDLI SPECIAL
- ▶ **FORM 5IF - EDLI**
- ▶ ONLINE COMPOSITE CLAIM
- ▶ SCHEME CERTIFICATE AGAINSTWITHDRAWALBENEFIT
- ▶ VIEW/PRINT ONLINE COMPOSITE CLAIM

Reports

- ▶ DATA MIGRATION
- ▶ ESTABLISHMENT

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1- FORM 5IF - EDLI
INCLUDED IN FUNCTION
ESTABLISHMENT >> TRANSACTION >
UNIFIED RECONCILED DATA UPLOAD
3- INTEREST RATE FOR THE FINANCIAL
YEAR 2016-17 UPDATED

- On clicking the function task will appear

CLAIM >> Transaction > FORM 31 - ADVANCE (68BD) [Exit](#)

| Reject | Claim ID | Member ID | Member Name | Pending Days | Created Date and Time |
|-----------------------|-----------------------------------|------------------------|--------------------|--------------|-----------------------|
| <input type="radio"/> | RJKOT17060000067 | RJKOT00003370000033878 | SH. ROHITASH SINGH | 27 | 02/06/2017 09:59:33 |
| <input type="radio"/> | RJKOT170600000105 | RJKOT00003370000013017 | SUDHIR PANDEY | 25 | 04/06/2017 15:14:37 |
| <input type="radio"/> | RJKOT170600000142 | RJKOT00004830000000021 | DEVI SINGH | 2 | |
| <input type="radio"/> | RJKOT170600000143 | RJKOT00004830000000024 | GOPAL | 2 | |
| <input type="radio"/> | RJKOT170600000144 | RJKOT00004830000000038 | AMAR ALAL | 2 | |
| <input type="radio"/> | RJKOT170600000145 | RJKOT00004830000000045 | BHERU LAL | 2 | |
| <input type="radio"/> | RJKOT170600000146 | RJKOT00004830000000083 | SH. CHOTELALI | 2 | |
| <input type="radio"/> | RJKOT170600000147 | RJKOT00004830000000102 | MADAN LAL | 2 | |
| <input type="radio"/> | RJKOT170600000148 | RJKOT00004830000000115 | KARAN SINGH | 2 | |
| <input type="radio"/> | RJKOT170600000149 | RJKOT00004830000000205 | NAND LAL | 2 | |



- On clicking the task given screen will appear

Role : DA ACCOUNT Last Login Date & Time : Jun 29, 2017 5:34 PM

CLAIM >> Transaction > FORM 31 - ADVANCE (68BD)

CLAIM ID * RJKOT170600000152
MEMBER ID * RJKOT00004830000000250
MEMBER NAME * KALLU
ESTABLISHMENT NAME * SHRI GANGANAGAR SUGER M
UAN * 100199563352
CLAIM DATE * 27/06/2017

| S.NO> | MEMBER ID | OLD MEMBER ID | DOJ | DOE | BENEFIT TAKEN |
|-------|------------------------|---------------|------------|-----|---------------|
| 1 | RJKOT00004830000000250 | - | 01/04/1997 | | - |

| SI NO | DETAILS | LINK |
|-------|-----------------------|---------------------------------------|
| 1 | PERSONAL DETAILS | Personal Details |
| 2 | COMMUNICATION DETAILS | Communication Details |
| 3 | PAYMENT DETAILS | Payment Details |
| 4 | CALCULATION DETAILS | Calculation Details |

Remark

AMOUNT TO BE SANCTIONED 20000

- 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.

CLAIM >> Transaction > FORM 31 - ADVANCE (68BD) - Internet Explorer

CLAIM >> Transaction > FORM 31 - ADVANCE (68BD)

Claim Id * RJKOT170600000152 Receipt Date 29/06/2017
Member Id RJKOT00004830000000250
Member Name as per claim KALLU

Mobile Number 0
Gender M DOB 10/01/1970
Aadhaar UAN 100199563352

Member (Select any) Father Name Spouse Name
Father Name * ADFDFD



- Address details can be edited/viewed through communication details link.

CLAIM >> Transaction > FORM 31 - ADVANCE (68BD)

Claim Id: RJKOT170600000152 Receipt Date: 29/06/2017

Member Id: RJKOT00004830000000250

Member Name: KALLU

Correspondence Address* Present Address Permanent Address

Address: ADD X
ADD2

City: DELHI Pin Code:

State: SELECT Address District: SELECT

Save Close

- 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.

CLAIM >> Transaction > FORM 31 - ADVANCE (68BD)

Claim Id: RJKOT170600000152 Receipt Date: 29/06/2017

Member Id: RJKOT00004830000000250

Establishment Name: SHRI GANGANAGAR SUGER MILLS

Member Name: KALLU

Advance to be paid through* AGENCY

Agency Name*

Mode of Remittance: NEFT

NEFT Details

Account No [View/Ifsc](#) IFSC Code* [Trace IFSC](#)

Bank Name* Branch Name

Address State

City District

AMOUNT PinCode

EMI

Update Close

AMOUNT TO BE SANCTIONED 20000



- 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”

CLAIM >> Transaction > FORM 31 - ADVANCE (68BD)

Member Name: KALLU
Member Id: RJKOT0000483000000250
Claim id : RJKOT170600000152
Rect Date : 27/06/2017

| | Employee Balance | Employer Balance | Total | |
|-------------------|------------------|------------------|--------|-----------------|
| Opening Balances: | 129379 | 480227 | 609606 | Cont Rate : |
| Appendix E: | 0 | 0 | 0 | Interest Rate : |
| Total: | 129379 | 480227 | 609606 | |

| Month | Opening Balance | | Wages | | Contribution/Transfer-in("JVDR") | | Withdrawal | | Refund |
|-----------|-----------------|----------|----------|----------|----------------------------------|----------|------------|----------|--------|
| | Employee | Employer | Employee | Employer | Employee | Employer | Employee | Employer | |
| 2016-2017 | | | | | | | | | |
| APR | 129379 | 480227 | 29412 | 3529 | 3529 | 0 | 0 | 0 | 0 |
| MAY | 132908 | 483756 | 30218 | 3916 | 3916 | 0 | 0 | 0 | 0 |
| JUN | 136824 | 487572 | 30218 | 3626 | 3626 | 0 | 0 | 0 | 0 |
| JUL | 140450 | 491298 | 30218 | 3626 | 3626 | 0 | 0 | 0 | 0 |
| AUG | 144076 | 494924 | 30696 | 3683 | 3683 | 0 | 0 | 0 | 0 |
| SEPT | 147759 | 498607 | 31140 | 3737 | 3737 | 0 | 0 | 0 | 0 |
| OCT | 151496 | 502344 | 28026 | 3363 | 3363 | 0 | 0 | 0 | 0 |
| NOV | 154859 | 505707 | 29131 | 3496 | 3496 | 0 | 0 | 0 | 0 |
| DEC | 158355 | 509203 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| JAN | 158355 | 509203 | 32109 | 4297 | 4297 | 0 | 0 | 0 | 0 |
| FEB | 162652 | 513500 | 32109 | 3853 | 3853 | 0 | 0 | 0 | 0 |
| MAR | 166505 | 517353 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | 476546 | 566376 | 37436 | 37436 | 37436 | 0 | 0 | 0 | 0 |



- For EMI cases , Certificate of EMI details are generated along with worksheet on clicking worksheet.

WorkSheet - Internet Explorer

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EMPLOYEES' PROVIDENT FUND ORGANISATION

Certificate for Form 31 (68BD) dated 04-Jul-2017

| | | | |
|-------------|--------------------------------|----------------------|------------------|
| Member Name | SH. ROHITASH SINGH | Claim id | RJKOT17060000067 |
| Member Id | RJKOT00003370000033878 | claim date | 2017-06-02 |
| Est Name | SRI RAM FERTILISERS - CHEMICAL | | |
| Dob | 1970-01-10 | Father's/ SpouseName | adfdfd (F) |
| Gender | M | Mobile | 8883203003 |
| Aadhaar | | Pay through | NEFT |
| Uan | 100320959250 | | |

| | | | |
|---------|---------------------------------------|-------------|----------------------|
| Address | 46 OLD SHRI RAM COLONY SHRI RAM NAGAR | A/C No | 0061015213 |
| | KOTA RAJASTHAN 324004 | IFSC | ALLA0210452 |
| | | Bank name | ALLAHABAD BANK |
| | | Branch name | BHILAI NEW KHURSIPUR |
| | | Agency name | AGENCYNAME |

| | |
|-----------|---|
| Form Type | Form 31 |
| Para Code | 3/9 - PARA 68BD (Purchase of Dwelling House/ Repayment of EMI under 68BD) |

| | Employee balance | Employer balance | Total |
|------------------------------|------------------|------------------|--------|
| Closing Balance | 337466 | 219631 | 557097 |
| Available amount for payment | 303719 | 197668 | 501387 |

| | |
|-----------------------|---------|
| Total Amount required | 25550 |
| EMI Repayment Amount | 2555 |
| EMI Commences from | 10/2017 |
| No of installment | 10 |

(TWO THOUSAND FIVE HUNDRED AND FIFTY FIVE ONLY)

It is certified that the claim has been thoroughly examined and has been processed completing all the requirements as per laid down procedure/manual.

It is further certified that the amount sanctioned for payment is final & no further corrections are required.Scroll may kindly be generated accordingly.

It is certify that the Member Bank Account Number and the Member Name is verified with photo copy of Bank Passbook(attached).



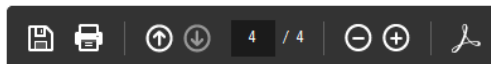
04-Jul-2017

EMPLOYEES' PROVIDENT FUND ORGANISATION
REPAYMENT OF EMI DETAILS

| | | | |
|-------------|--------------------------------|----------------------|------------------|
| Member Name | SH. ROHITASH SINGH | Claim id | RJKOT17060000067 |
| Member Id | RJKOT00003370000033878 | claim date | 2017-06-02 |
| Est Name | SRI RAM FERTILISERS - CHEMICAL | | |
| Dob | 1970-01-10 | Father's/ SpouseName | adfffd (F) |
| Gender | M | Mobile | 8883203003 |
| Aadhaar | | Pay through | NEFT |
| Uan | 100320959250 | | |

| Month/Year | EMI amount |
|------------|------------|
| 10/2017 | 2555 |
| 11/2017 | 2555 |
| 12/2017 | 2555 |
| 1/2018 | 2555 |
| 2/2018 | 2555 |
| 3/2018 | 2555 |
| 4/2018 | 2555 |
| 5/2018 | 2555 |
| 6/2018 | 2555 |
| 7/2018 | 2555 |

| | | | |
|------------------------|----------------|-------------|-------|
| DA | SS | AO | TASK |
| KAMAL KISHORE MEENA | MOHAN LAL SAHU | VIPIN HUMAD | 10203 |



<----->

- 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