

BEFORE YOU FILL UP THE FORM FOR A PF CODE NUMBER, PLEASE GO THROUGH THESE INSTRUCTIONS.

ONCE YOUR APPLICATION IS SUBMITTED, YOU WILL NOT BE ABLE TO EDIT ANY DATA.

IT IS ADVISED TO USE [THE CHECK LIST](#) TO AVOID ANY DATA ENTRY ERROR OR MISSING DOCUMENT

1. The applicant should have a PAN in the name of the establishments/proprietor of the establishment for which he/she is applying.

The PAN is to be entered in the page from where the application is opened and will be displayed in the application form. It cannot be edited from the application.

Only in case of a Proprietorship firm, the PAN can be in the name of the Proprietor. In such case the name of the OWNER in the Owners' details should be exactly as per the PAN.

2. The name should be entered exactly as mentioned in the PAN Card. Even a slight variance with an extra space etc also will result in rejection as the data is verified online.
3. Application should be made by the employer if the Act applies on its establishment. For this purpose you may refer to the [Section 1\(3\) \(a\) and 1\(3\) \(b\)](#) of the EPF and MP Act 1952. The [list of activities](#) on which the Act applies should also be referred.

The employer of an establishment on which the Act does not apply, can also apply for a code number on voluntary basis (Pl refer [Section 1\(4\)](#) of

the said Act, if the majority of the employees of the establishment give their written consent for it from the date on which it is agreed upon or any subsequent date in the agreement. The consent cannot be from a previous date.

The employer should select the appropriate option for the applicability.

It should be noted that in all cases of the application, the post coverage inspection will be made by the EPFO to verify the details submitted through the application.

4. Address: The employer should have documentary address proof for the address entered. Following address proofs are accepted:

- ✓ Any license/certificate/number issued by any Govt. authority
- ✓ Copy of water connection in the name of the Establishment
- ✓ Copy of bank passbook/statement
- ✓ Copy of postpaid telephone bill of any company
- ✓ Copy of power connection in the name of the Establishment

The application will show all the above address proof as auto selected. However the employer can de-select the ones that are not available with him/her.

In case it is de-selected it will be treated as a declaration of the employer that the de-selected address proof is not available for his/her establishment.

At least one address proof is mandatory.

The address entered will be used to decide the jurisdiction of the PF office under which the establishment will fall.

The post coverage inspection by the EPFO will be made on this address and the status of inspection will be updated accordingly.

If employer is selecting address proof as “copy of postpaid telephone bill of company” than employer should mention the post-paid telephone no. in telephone no. column.

5. Date of set up: Date of setup will be the date when the establishment was started.

6. Proof of date of setup: Proof of date of setup will be based on drop down menu list. The list is only indicative. In case the employer has some other proof of address, he may select others, and enter the relevant details.

7. IF THE ESTABLISHMENT IS A FACTORY Establishment, then employer have to provide FACTORY Details and MANAGER/OCCUPIER details in their respective fields, which will appear after selecting YES.

In case the employer is also the Manager/Occupiers of the factory, the name of the Owner may appear in both Manager/Occupier details as well as in the Owners’ Details later in the application.

8. PRIMARY BUSINESS ACTIVITY will be selected based on drop down menu list. The list will appear based on selection of THE ESTABLISHMENT IS A FACTORY as Yes or No. In case of a Factory the Schedule I Industries will appear, and in case of a Non-Factory Establishment, class of establishments notified will appear. It is advised that the employer should identify the activity before starting filling of the form.

9. License Details will be based on drop down menu list.

- The employer should enter the details of all the licenses available for the establishment at the time of application.

- When any available License type is not in the drop down list, he should select OTHERS, in which case the License Type should be entered in the REMARKS field mandatorily.
- In case a License is selected as Address Proof, the check box against the said License should be selected.
- **At least one license is mandatory.**

10. In case any License (Registration) is under the Cooperative Societies Act, then an additional field asking whether the establishment is working with aid of Power will appear. A Cooperative Society establishment working without aid of Power should have 50 employees for coverage under section 1(3) (a) or 1(3) (b) by virtue of [Section 16 \(1\)](#).

11. The employer has to mention the ESIC Code number if the establishment is already having such code number. Not mentioning the Code number will be treated as a declaration that the establishment is not having such code number at the time of application.

12. Ownership type can be selected from the drop down menu. According to the selection, the proof of ownership type should also be entered. For the Government Departments a letter from the Head will serve as the ownership proof. In case Proprietorship Firm is selected, only one owner can be added. The name of the owner should be exactly as per PAN entered in the application in case the PAN is in name of the owner.

13. Under owner's details particulars of OWNER [\[Employer as per Section 2 \(e\)\] and for the purpose of Form 5A](#) should be entered. In case Proprietorship Firm is selected as ownership type above, only one

owner can be added. The name of the owner should be exactly as per PAN in case the PAN furnished is in name of the owner. More than one owner's details can be entered. In such case Employer have to tick mark as **PRIMARY** that employer who is incharge of the PF Matters. The employer should also select the mobile number on which the SMS is to be received.

14. In-case of Establishment is on lease, the details of **LESSEE** are mandatory.

This is for the purpose of Form 5A.

15. Employment Details: The employer should give the details of the number of employees (including the employees in its branches) as on date of application, number of excluded employees out of the total and the date on which the number exceeded 19. (In case of a Cinema Theatre, exceeded 4 or in case of a Cooperative Society, working without aid of power, exceeded 49). In case of voluntary coverage, the date of agreement and any subsequent date for coverage mentioned in the Agreement should be entered.

16. Bank Details: At-least one **Bank Account Detail** is mandatory. If bank account has the address proof, then the check box against the bank account is to be selected. A scanned copy of cheque is required to be uploaded with bank details. There is option to add more than one bank account. The cheque image is to be uploaded for all the bank accounts.

While making the entry, the IFSC should be entered correctly as given in the cheque leaf, the bank name and branch will be auto displayed. In case of non-IFSC Bank, the data should be entered.

17.Branch Details: This part should be filled if the establishment has branches (units). The number of employees in the branches as on date of application should be mentioned.

PROCESS OF SUBMISSION OF THE FORM

SAVING THE PARTIALLY FILLED APPLICATION

The employer has the option to save a partially filled form after filling the Name & address of the establishment and selection of the Option whether the Act applies or the application is for voluntary coverage.

An application number will be generated, which should be noted by him.

The partially filled application can be reopened with the data on entry of the PAN and application number, for entry of the remaining part and submission.

In case the application number is not noted, a blank form will open after entry of the PAN.

The application number will remain the same whenever the partial form is saved and reopened after some more entries and saved again. However after 30 days of the generation of the application number the data will lapse if the application is not submitted.

SUBMISSION OF THE APPLICATION FORM

The applicant has to click the Preview Button.

All validations will take place and the errors if any, will be prompted one by one.

If the validation is successful, a preview page will open, where employer can check the all details. **(Please see that the POP up is Enabled).**

It is advised that the application is printed before submission and the data entered is verified against the actual documents to avoid any error. Editing is permitted only till the application is submitted.

If the employer is satisfied that the entered data is correct, he should enter the CAPTCHA code and click the get PIN button.

Employer will get the authorization PIN Number as SMS on primary mobile number selected in the Owner's details. The PIN is also sent on the e-mail id of the employer and if there is any problem in the mobile connectivity, it is advised that the e-mail account should be kept open so that the PIN is noted from the mail also.

He should tick the declaration regarding the correctness of the data and enter the PIN received on his mobile number.

Then on click of submit, the application will be submitted with message on successful submission. A PDF file will be made available for download.

The employer should save the file and print it as a copy of the same will have to be submitted to the EPFO Office once the code number is allotted.

POST SUBMISSION ACTIVITIES

The employer will be intimated about the allotment through SMS and temporary login id and password for the Employer Portal. He will have to login, create his permanent user id and the password of his choice and start remittance by uploading the ECR text file.

The PROVIDENT FUND CODE NUMBER INTIMATION LETTER will be available for download under his login.

The code allotment letter will have all the documents mentioned in the application printed on it and will be having the Form 5A and blank specimen signature card. The Form 5A will be a part of the Code Allotment letter for any future use.

After downloading the code letter, the employer should keep the application form along with the documents, Form 5A and Specimen Signature Card ready for Verification and Collection by the Enforcement Officer who will visit the establishment after the code number is allotted.

In case the PAN verification fails, he will get an SMS on the rejection of the application due to mismatch of the PAN and the name.

If the employer had made an error in correctly entering the PAN or the name, he should again follow the process to apply.
