Transfers and Transfer Claims of Employees

> Disclaimer: This document is intended solely for educational purposes. The content herein is subject to change based on evolving finance trends and any relevant rulings by the Government of India. Readers are advised to consult with qualified professionals for specific guidance related to their individual circumstances.

Transfer

Q1. In case of change in employment whether a member can get his PF account transferred?

On change in employment, the member should necessarily get his PF account transferred to his present establishment, duly submitting Form 13(R). A member can submit a claim for transfer online using the member interface at the unified portal.

Q2. If past accumulations are not transferred on cancellation of exemption, how the provident fund amount is paid to the members?

The local RPFC will ensure transfer of securities/cash and arrange for refund of dues to the members.

Q3. How is a PF member informed of the transfer affected?

A copy of Transfer Certificate (Annexure-K) issued to the transferee Regional P.F. Commissioner/P.F. Trust giving full details of the transfer can be requested from the EPF office.

Transfer claims of Employees

Q1. How do I know if I require a PF transfer?

If the member has more than one PF member IDs (MIDs) and the PF amount of these MIDs has not been transferred into the latest MID, member is required to get his PF transferred into his current MID.

Q2. What is the importance of UAN in online transfer of PF?

Universal Account Number (UAN) acts as an umbrella for the multiple Member IDs allotted to an individual by different employers. UAN enables linking of multiple EPF Accounts (Member Id) allotted to a single member. UAN offers a bouquet of services like dynamically updated UAN card, updated PF passbook including all transfer-in details, facility to link previous members' PF ID with present PF ID, monthly SMS regarding credit of contribution in PF account and facility for auto-triggering transfer request on change of employment.

Q3. What all information needed at the time of applying online PF transfer?

For online PF transfer please ensure following:

1. Employee should have activated his UAN at https://unifiedportal-mem.epfindia.gov.in/memberinterface/portal Mobile number used for activation should also be active as OTP will be sent in this number.
2. Aadhar number, Bank account of employee should have been seeded against the UAN.
3. The date of exit for the previous employment must have been entered. If date of exit is missing kindly follow the process as given in this FAQ for updation of date of exit.

4. The employer should have approved the e-KYC.
5. Only one transfer request against the previous member ID can be accepted.
6. Personal details reflecting under the “Member Profile” must be verified and confirmed before applying

Q4. Whether date of exit for previous Job/employment is mandatory for applying online Transfer? What are the prerequisites for updation of date of exit?

Yes, updation of date of exit of previous job/employment is mandatory for applying online transfer. The date of exit can be updated only after two months of leaving a job. Also, the date of exit can be any date in the month in which the last contribution was made by the previous employer.

1. This facility is based on Aadhaar-based one-time password (OTP). Thus it can only be utilized by those who have activated their UAN and linked their UAN with a verified Aadhaar number and have mobile linked to Aadhar number for receiving the OTP sent for verification

Q5. What is the process to update date of exit?

1. Go to the https://unifiedportal-mem.epfindia.gov.in/memberinterface/ and login using your UAN and password
2. Click on tab “manage" >> click “mark exit". Under the “select employment” dropdown, select the previous PF account number linked to your UAN
3. Enter the date and reason of exit.
4. Then request for an OTP which will be sent to your Aadhaar-linked mobile number.
5. After you enter the OTP, submit the request. It may be noted that once the date of exit is updated, it cannot be changed.

Q6. How do I know/check if my PF amount has been transferred from my previous member IDs to my current member ID?

The member can check this by viewing his passbook. The member must log in to his member unified portal. In the homepage itself the member must go to View > Passbook. Thereafter the member must enter his UAN, password and captcha to login once again. After login the member can view the passbook of all his MIDs. If his PF has been transferred then the same will be shown as a credit entry in this latest passbook. Otherwise all the passbooks of his previous MIDs will show some balance. In such a case the member is advised to submit online transfer claim.

Q7. With the introduction of UAN and its subsequent linking with Aadhar has made UAN unique for a subscriber. It does not change with change of employment. Then why do I have to file transfer claim?

A member whose UAN is seeded and is fully KYC complaint must not file any transfer claim on change of employment. In such a case whenever an employee joins a new job and the first month’s PF contribution is received then a transfer auto trigger is generated. Soon after, the member’s past PF amount gets automatically transferred into his new account. This automatic transfer gets through if not actively stopped by the member.

Q8. After submitting the transfer claim I am getting an option to download the printable Form 13. Do I need to print the same and submit it to the concerned Field Office?

No. If you have filed online transfer claim then there is no need to submit a physical copy.

Q9. How to track the status of online transfer claim?

The Member e-SEWA portal allows the member to track the status of the transfer claim submitted by going to 'Online Services' tab and then to 'Track Claim Status'. Once the claim is submitted the status shown is "Pending with the employer". If the employer approves transfer request, status of the form changes to - "Accepted by the employer. Pending at Field Office".

Q10. I have 2 different UANs with one MID linked with each. How do I file online transfer claim in this case?

In such a case there is no provision to file online transfer claim. However a physical claim can be filed duly mentioning the previous and present employment details. The physical Form 13(Transfer claim)can be downloaded from https://www.epfindia.gov.in/site_docs/PDFs/Downloads_PDFs/Form13.pdf. The same must be attested by the authorized signatory of either present or previous employer and submitted to the concerned Field Office. In order to avail all the online services after the transfer-in is effected the member is advised to do the KYC of his latest UAN. Thereafter on job change the member must disclose his KYC compliant UAN to his new employer so as to avoid duplicity of UAN number

Q11. I used to work in an exempted establishment. Now I work in an unexempted establishment. How can I file transfer claim?

Employee is required to submit PF Transfer Claim to the Exempted Trust which will enter the transfer details as Annexure K in Unified Portal. The employer will make the online payment against the Annexure K. After due approval by PF office the past amount and service history gets reflected in his current MID passbook.

Q12. What is Annexure K?

Annexure K is a document which mentions the member details, his PF accumulations with interest, service history, Date of Joining and Date of Exit and employment details including past and present MID. This document is required by the Field Office/Trust to effect a transfer in.

Q13. I want to file a PF transfer claim but I do not know if my past employer was exempted or un-exempted. How can I find out?

The member can view the status of any establishment by going to PF establishment search. The member must go to https://www.epfindia.gov.in. Thereafter, go to Our Services> For Employers > Establishment Search (Under head Services). Then the details of the establishment (name or PF Code) can be entered to view the status of the establishment.

Q14. My PF amount got transferred from my previous MID to my present MID. However my Pension amount has not been transferred. What to do?

The pensionary benefits are dependent on the length of service and the average of last wages drawn. It does not depend on the actual amount lying in the Pension Fund Account. Hence this amount is not transferred during change of employment and a mere transfer of past service history makes the member eligible for pension related benefits

Q15. Why to transfer PF with change in job/employment?

1. The provident fund monies are to provide for a source of income (social security) after retirement during old age. To create a sizable savings it is necessary to start saving early and accumulate the corpus by reducing intermittent withdrawals. Hence it is advisable to transfer PF with each job change to reap full benefits of the social security schemes.
2. 1. PF transfer lets the past service transferred into the current member ID. If the total service is more than 5 years then TDS is not charged on PF withdrawal. Clubbing of past service may help the member in crossing the 5 year mark thus saving on TDS.

2. Transferring PF amount instead of withdrawing gives the member the benefit of compounding of funds. The compounding effect can be visualized in a way that if a member does not withdraw his

PF money on change of job and gets it transferred to his new account then the same money would get doubled in approximately 8 years, assuming EPFO continues to give at least 8.5% interest rate just like it has given in the past so many years.

3. A service of more than 10 years makes the member eligible for pensionary benefits. Transfer of PF accounts ensures that the past services does not get lapsed and continues to get added in the subsequent employment.

Q16. What are the types and modes of PF transfer?

S.No.	Types of PF Transfer	Mode of Transfe
1.	Transfer of PF from one un-exempted establishment to another un-exempted establishment.	Online
2.	Transfer of PF from exempted establishment to un-exempted establishment.	Online
3.	Transfer of PF from un-exempted establishment to exempted establishment.	Online
4.	Transfer of PF from exempted establishment to another exempted establishment.	Offline
5.	Transfer of EPS only (for EPF exempt members) from un-exempted establishment to un-exempted establishment.	Online

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