<u>Instructions for Submission of CPF Final Settlement Details</u>   Date : 21/01/2017

There are many employees retiring from MSEB companies and due for retirement whose CPF Final claims are received by CPF section. The information contained in the CPF claims is required to be entered in the CPF Portal and MSEDCL payroll system. Due to very high number of claims, the data entry work of CPF section increased. Also, in view of direct payment of CPF claims proposal from 1-Apr-2017, it is absolutely necessary to collect the Bank details of the employees and nominees. Hence, it is now decided to allow the GAD users of the division/circle offices to enter the CPF Final settlement claim details in the CPF Portal system before forwarding the claims to CPF section. This will reduce the data entry at CPF section and also the details of claims in transit can be seen by CPF section. The GAD users can also track the status of the CPF claims. This will reduce the workload on CPF section and increase the number of claims that can be sanctioned. **The HR section users must submit the special access form no 102 so that they can start entering the application details from 23-Jan-2017 onwards. <u>NO APPLICATION WILL BE ACCEPTED BY CPF SECTION WITHOUT THE APPLICATION DETAILS ENTERED IN MSEB CPF PORTAL AND WEB ID ASSIGNED TO THE FINAL SETTLEMENT APPLICATION.</u>**

The steps are given below for online submission of CPF Final Settlement claims.

1) HR section must have registered to CPF Portal and special access Form No 102 must have been submitted to CPF section as per circular No 201.

2) After HR section gets special access, they can see the options 'On Behalf Settlement Application' and 'Settlement Bank/Address/Nominee' options.

3) Employee/nominees should fill up the existing final CPF forms manually and give to HR Section along with the Cancelled Cheque and affidavits as instructed by CPF section. See instructions on www.mahadiscom.in under 'Employee Portal'.

4) The form should be checked for correctness and relevant documents must be attached with form.

5) **Before entering the CPF Final Settlement claim for death employees, it is necessary to check the CPF Nomination existing in system**. **See instructions for online CPF nomination.**

6) HR section should fill up the CPF Final Settlement claim details using the option 'On Behalf Settlement Application' in the MSEB CPF Portal. **If application gets saved successfully, note the 'Web Id'**. **<u>This Web Id must be marked on the application form as 'WEB ID : NNNN' whereas NNNN is Web Id number. This web id will also be shown on clicking 'On Behalf List' as 'CPF No.(Web ID)' in first column.</u>**

7) Existing applications which are not yet submitted can be viewed by clicking 'On Behalf List' and can select and edit the details of the application by clicking 'View/Edit' button. **In this option the application will be visible only to the person who has entered the application details**.

8) Then select the option 'Settlement Address/Bank/Nominee' details using the option provided. Search the case by entering Web Id and CPF Number. If the application is of employee self, only employee details can be entered in this screen and some fields are disabled. If the application is done by nominee, existing CPF Nomination details will be shown. Corrections, if any, can be done. If the nomination details shown are different than the persons who have applied for Settlement, then it may be that Legal Heir/Succession certificate will have to be attached. Consult CPF Nomination section on cpfnomination@gmail.com. In case of legal heir certificate/succession certificate asked by CPF section, get the same from applicants and enter the details.

9) After the 'Settlement Address/Bank/Nominee' details are saved, click on 'On Behalf List'.

10) Search the employee CPF Number and check all the details entered in system with respect to manual form by clicking on 'View/Edit'. **If all the details correct, then only click on the 'Final Submit' button shown in 'On Behalf List'**.

11) Division office should send the hard copy application form on the same day of final Submit along with documents to CPF section.

12) After receipt of the hard copy, the CPF section will take the application details from CPF Portal in MSEDCL payroll system and assign **'Inward Number'** to the case. After inward number and inward date is assigned to the case, the employee and HR section can be sure that the case is received by CPF section. Mail will get sent on employee mail id as registered on CPF portal.

13) CPF section will process the cases in the order of receipt and sanction or reject the case in MSEDCL payroll system.

14) **If the case is sanctioned on or before 31-Mar-2017, payment will have to be made by the accounting division/circle office after receipt of the Sanction order from CPF section. To check the sanction date, search by entering CPF number. Click on 'View'. 'Sanction Date' is shown under 'Sanction Details' and 'status' value should be 'Sanctioned'.**

15) **If the case is sanctioned after 31-Mar-2017, payment will be made by CPF Section. After payment is done, the 'status' will become 'Settled'.**

16) **Any complaints related to saving the final settlement application details should be sent on cpfsection@gmail.com along with screenshots and mention the details of wrong data shown in system, if any. If any class IV employee crossed age 58 and then he got promoted, problem may occur for such employee. Inform the same on given email Id with details.**