

EPF Admin Dashboard

User Manual & Operating Guide

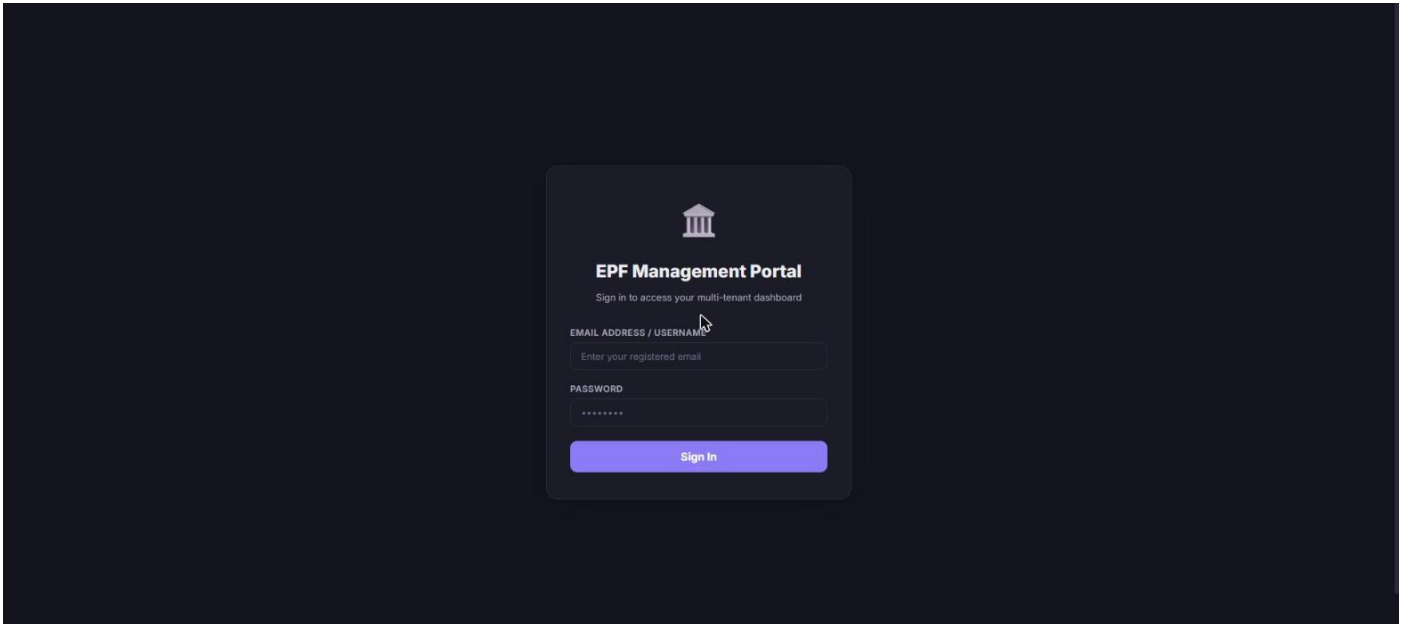
A step-by-step guide for consultants and establishment administrators covering establishment registration, employee data entry, wage entry, EPF challans (TRRN/CRRN), statutory reports, and subscription payments.

Contents

1. Logging In
2. Dashboard Overview
3. Setting Up the Establishment Register
4. Organization Structure (Branches, Divisions, Units)
5. Employee Import & Data Entry
6. Creating a Financial Year Entry
7. Wage Entry
8. Challans — TRRN & CRRN Entry
9. Generating Statutory Reports
10. Subscription Fees & Making Payments
11. How Data Is Saved
12. What You Should NOT Do

1. Logging In

Open the application URL in a browser and sign in with the email address and password issued to you by your administrator. Consultants and superadmins share the same login screen — the system automatically routes you to the correct view based on your account role.

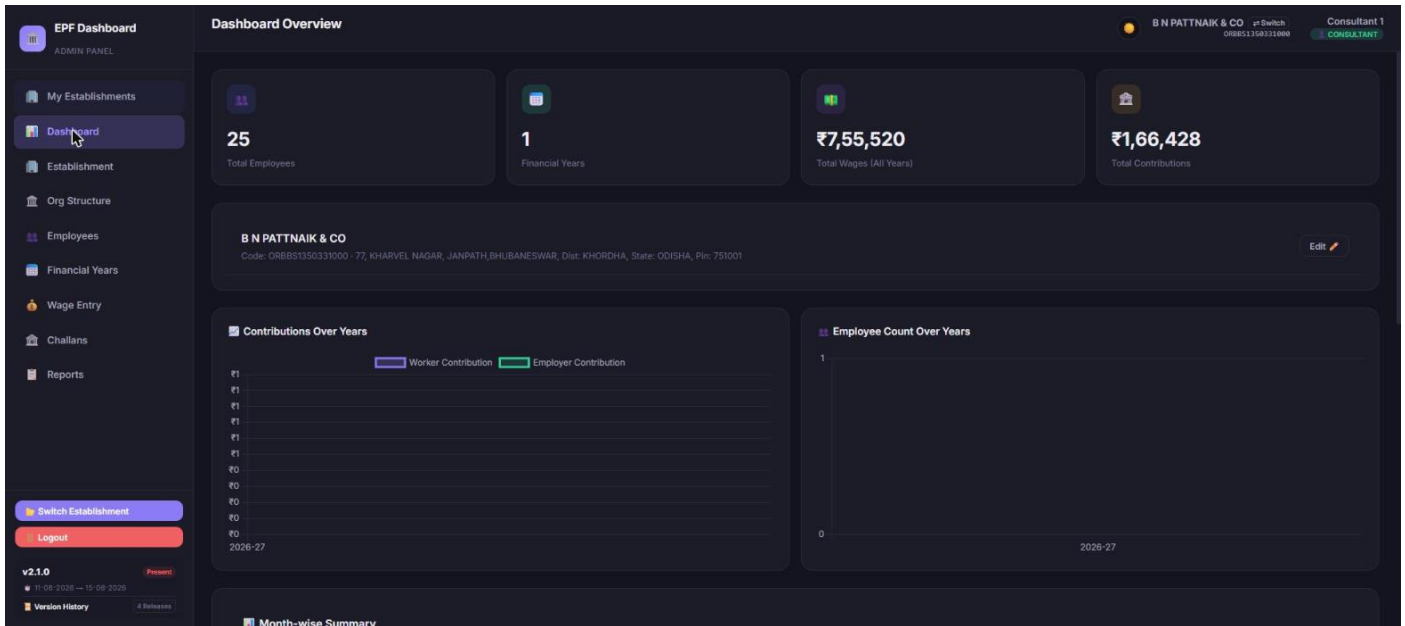


The sign-in screen. Enter your email and password, then click Sign In.

Each user account belongs to exactly one role — Consultant or Superadmin. Consultants only see the establishments assigned to them; superadmins can see and manage every establishment in the system.

2. Dashboard Overview

After logging in you land on the Dashboard for your currently active establishment. It shows total employees, number of financial years on record, total wages, and total EPF contributions, along with charts of contributions and employee count over the years, and a month-wise contribution summary.



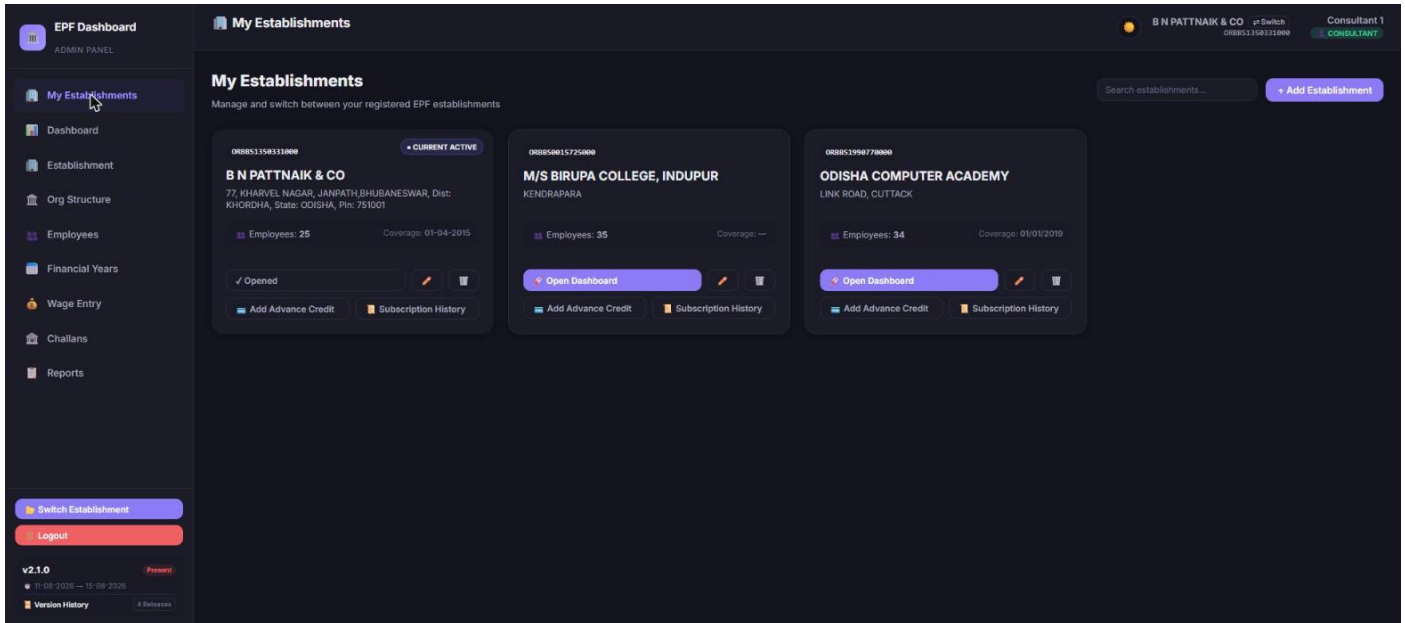
Dashboard Overview for the active establishment.

If you manage more than one establishment, use “Switch Establishment” in the left sidebar, or the “■ Switch” link next to the establishment name in the top-right corner, to change which establishment's data you are viewing and editing.

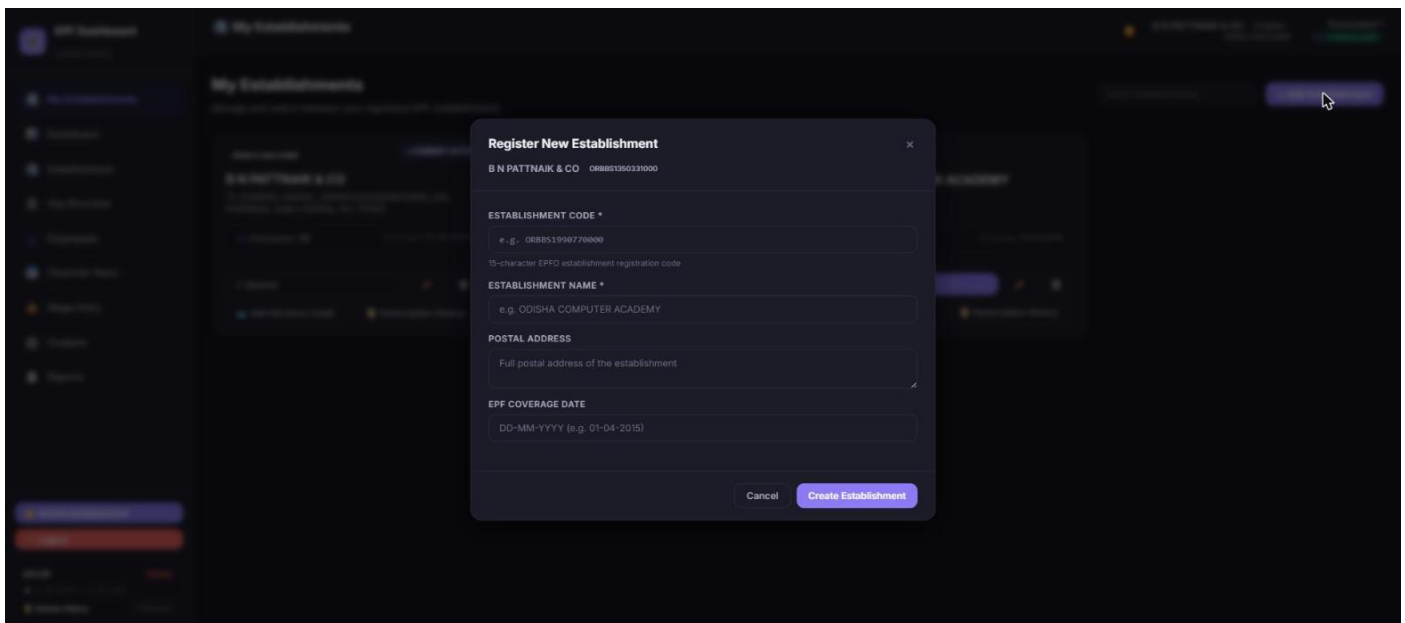
3. Setting Up the Establishment Register

Every establishment must be registered before any employee, wage, or report data can be entered against it. There are two places to do this:

A) Registering a brand-new establishment. Go to **My Establishments** in the sidebar, then click **+ Add Establishment**. Fill in the 15-character EPFO Establishment Code, the establishment name, postal address, and EPF coverage date (the date from which the establishment became liable under the EPF Act), then click **Create Establishment**.



My Establishments — lists every establishment you have access to, with quick actions.



The Register New Establishment form, reached via + Add Establishment.

B) Editing an existing establishment's profile. Go to **Establishment** in the sidebar to view or update the code, name, address, and coverage date of the currently active establishment. Click **Save Details** after making changes.

EPF Dashboard

ADMIN PANEL

My Establishments

Dashboard

Establishment

Org Structure

Employees

Financial Years

Wage Entry

Challans

Reports

Switch Establishment

Logout

v2.1.0

11-08-2025 — 15-09-2025

Version History

4 Releases

Establishment Profile

B N PATTNAIK & CO

Switch

ORBS1350331000

Consultant 1

CONSULTANT

Current Active Establishment Profile

Configure establishment registration code, official name, address, and coverage date.

ESTABLISHMENT CODE *

ESTABLISHMENT NAME *

ADDRESS

ORBS1350331000

B N PATTNAIK & CO

77, KHARVEL NAGAR, JANPATH,I

COVERAGE DATE

01-04-2015

Save Details

Establishment Code is used for naming exported files and printed on all official Form 3A, 6A, and ECR returns.

All Covered Establishments

List of all establishments available in your active workspace account.

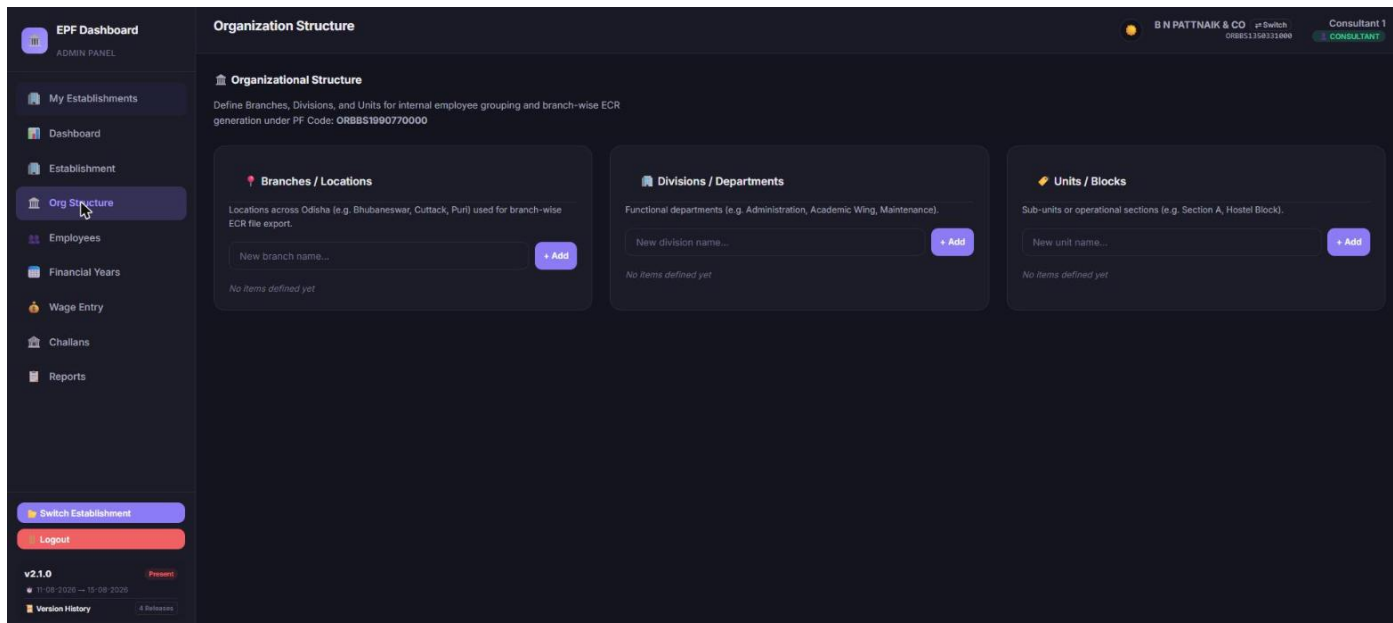
#	CODE	ESTABLISHMENT NAME	ADDRESS	COVERAGE DATE	EMPLOYEES	CREATED DATE	ACTIONS
1	ORBS1350331000	B N PATTNAIK & CO	77, KHARVEL NAGAR, JANPATH,BHUBANESWAR, Dist: KHORDHA, State: ODISHA, Pin: 751004	01-04-2015	25	15-08-2025	Active Edit
2	ORBS0015725000	M/S BIRUPA COLLEGE, INDUPUR	KENDRAPARA	—	35	15-08-2025	Load Edit
3	ORBS1990770000	ODISHA COMPUTER ACADEMY	LINK ROAD, CUTTACK	01/01/2019	34	15-08-2025	Load Edit

Establishment Profile page — also lists all covered establishments with Edit / Load actions.

The Establishment Code is used to name every exported file (Excel, PDF, ECR text files) and is printed on official Form 3A, 6A, and ECR returns — double-check it is entered exactly as issued by EPFO before generating any statutory documents.

4. Organization Structure (Branches, Divisions, Units)

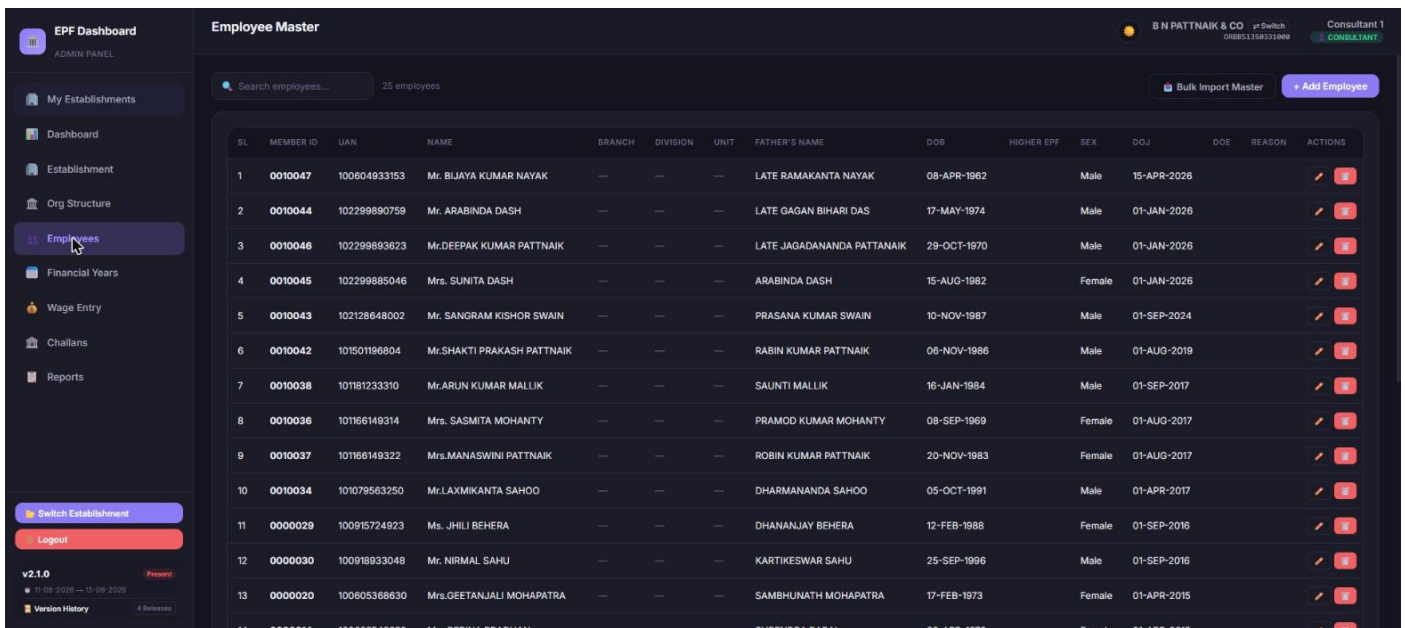
This is an optional step. If your establishment has multiple physical locations, departments, or sub-units, define them under **Org Structure** in the sidebar so employees can be grouped and ECR files can be generated branch-wise. Type a name in the relevant box (Branches/Locations, Divisions/Departments, or Units/Blocks) and click **+ Add**.



Org Structure page — defines Branches, Divisions, and Units for the establishment.

5. Employee Import & Data Entry

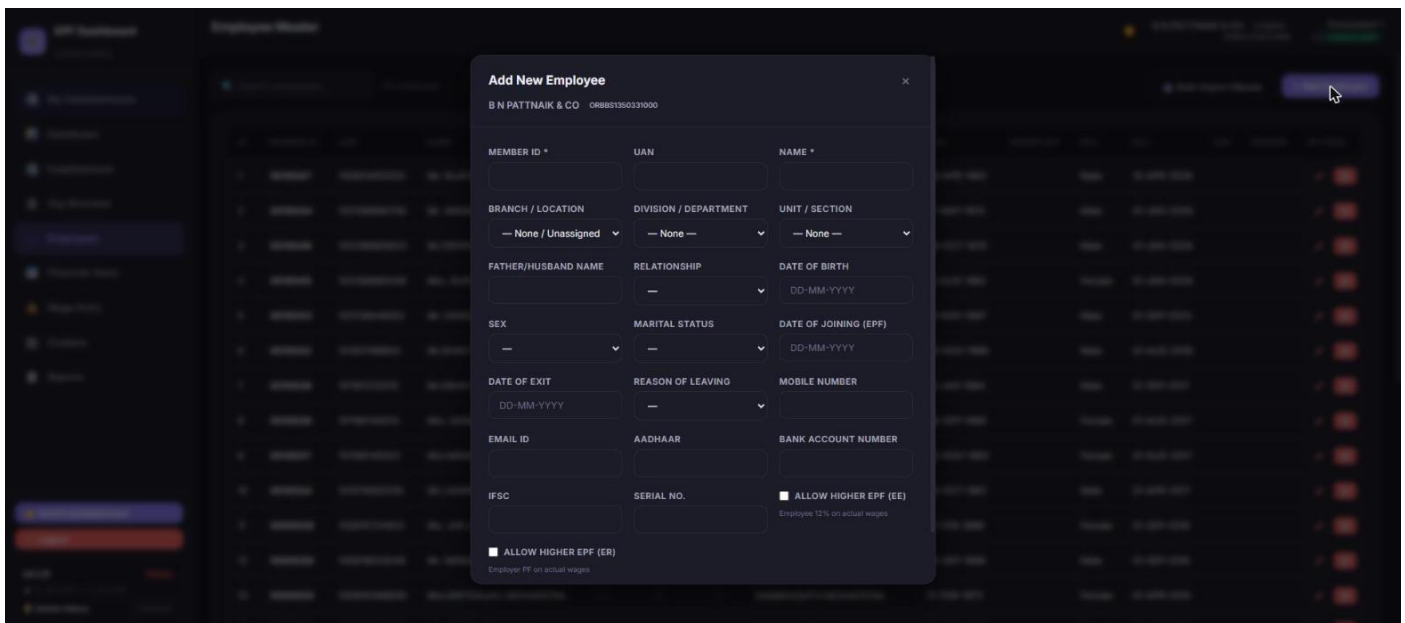
Go to **Employees** in the sidebar. This is the Employee Master — every employee who has ever been a member of the EPF scheme at this establishment.



SL	MEMBER ID	UAN	NAME	BRANCH	DIVISION	UNIT	FATHER'S NAME	DOB	HIGHER EPF	SEX	DOJ	DOE	REASON	ACTIONS
1	0010047	100604933153	Mr. BIJAYA KUMAR NAYAK	—	—	—	LATE RAMAKANTA NAYAK	08-APR-1962		Male	15-APR-2026			
2	0010044	102298980759	Mr. ARABINDA DASH	—	—	—	LATE GAGAN BIHARI DAS	17-MAY-1974		Male	01-JAN-2026			
3	0010046	102298983623	Mr. DEEPAK KUMAR PATTNAIK	—	—	—	LATE JAGADANANDA PATTNAIK	29-OCT-1970		Male	01-JAN-2026			
4	0010045	10229885046	Mrs. SUNITA DASH	—	—	—	ARABINDA DASH	15-AUG-1982		Female	01-JAN-2026			
5	0010043	102128648002	Mr. SANGRAM KISHOR SWAIN	—	—	—	PRASANA KUMAR SWAIN	10-NOV-1987		Male	01-SEP-2024			
6	0010042	101501196804	Mr. SHAKTI PRAKASH PATTNAIK	—	—	—	RABIN KUMAR PATTNAIK	06-NOV-1986		Male	01-AUG-2019			
7	0010038	10181233310	Mr. ARUN KUMAR MALLIK	—	—	—	SAUNTI MALLIK	16-JAN-1984		Male	01-SEP-2017			
8	0010036	10186149314	Mrs. SASMITA MOHANTY	—	—	—	PRAMOD KUMAR MOHANTY	08-SEP-1969		Female	01-AUG-2017			
9	0010037	10186149322	Mrs. MANASWINI PATTNAIK	—	—	—	ROBIN KUMAR PATTNAIK	20-NOV-1983		Female	01-AUG-2017			
10	0010034	101079563250	Mr. LAXMIKANTA SAHOO	—	—	—	DHARMANANDA SAHOO	05-OCT-1991		Male	01-APR-2017			
11	0000029	100915724923	Ms. JHILI BEHERA	—	—	—	DHANANJAY BEHERA	12-FEB-1988		Female	01-SEP-2016			
12	0000030	100918933048	Mr. NIRMAL SAHU	—	—	—	KARTIKESWAR SAHU	25-SEP-1996		Male	01-SEP-2016			
13	0000020	100605368630	Mrs. GEETANJALI MOHAPATRA	—	—	—	SAMBHUNATH MOHAPATRA	17-FEB-1973		Female	01-APR-2015			

Employee Master list, showing Member ID, UAN, name, father's name, DOB, sex, DOJ, DOE and reason.

A) Adding employees one at a time. Click **+ Add Employee** and fill in the Member ID (required), UAN, Name (required), branch/division/unit, father's/husband's name, date of birth, sex, date of joining (EPF), date of exit and reason for leaving (if applicable), and other identity fields. Tick **Allow Higher EPF (EE)** or **(ER)** only for employees who have formally opted for contribution on actual wages above the statutory ceiling.

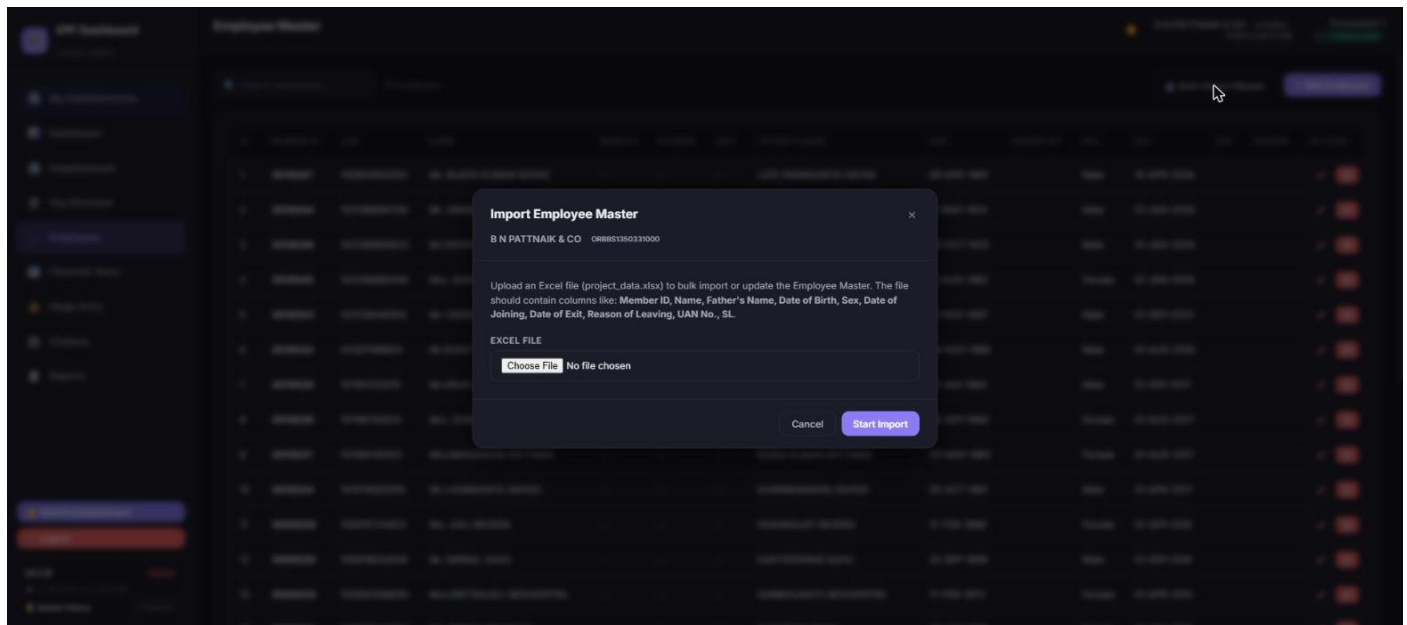


Add New Employee
B N PATTNAIK & CO 008851350331000

MEMBER ID *	UAN	NAME *
BRANCH / LOCATION — None / Unassigned —	DIVISION / DEPARTMENT — None —	UNIT / SECTION — None —
FATHER/HUSBAND NAME	RELATIONSHIP —	DATE OF BIRTH DD-MM-YYYY
SEX —	MARITAL STATUS —	DATE OF JOINING (EPF) DD-MM-YYYY
DATE OF EXIT DD-MM-YYYY	REASON OF LEAVING —	MOBILE NUMBER
EMAIL ID 	AADHAAR 	BANK ACCOUNT NUMBER
IFSC 	SERIAL NO. 	☐ ALLOW HIGHER EPF (EE) Employee 12% on actual wages
☐ ALLOW HIGHER EPF (ER) Employee 12% on actual wages		

Add New Employee form.

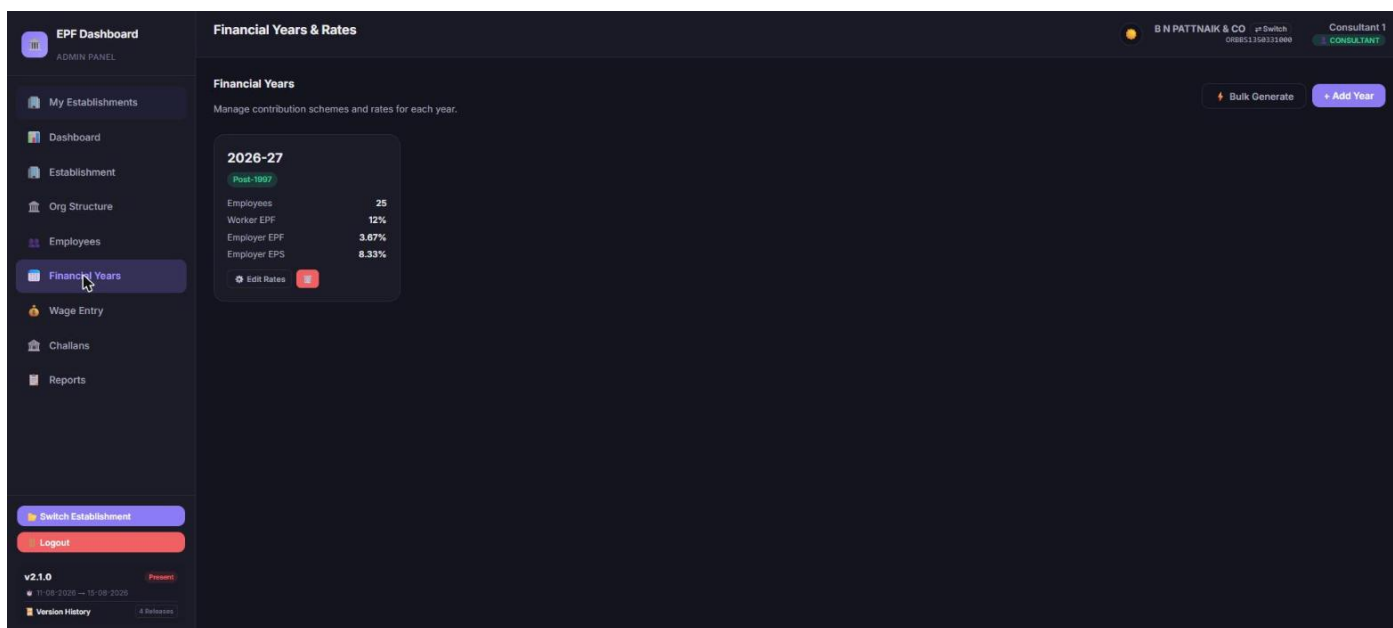
B) Bulk importing employees. For a new establishment or a large batch of employees, click **Bulk Import Master** and upload an Excel (.xlsx) file. The file must contain columns for Member ID, Name, Father's Name, Date of Birth, Sex, Date of Joining, Date of Exit, Reason of Leaving, UAN No., and SL. Re-uploading a file with the same Member IDs updates those existing records rather than duplicating them.



Import Employee Master — bulk Excel upload dialog.

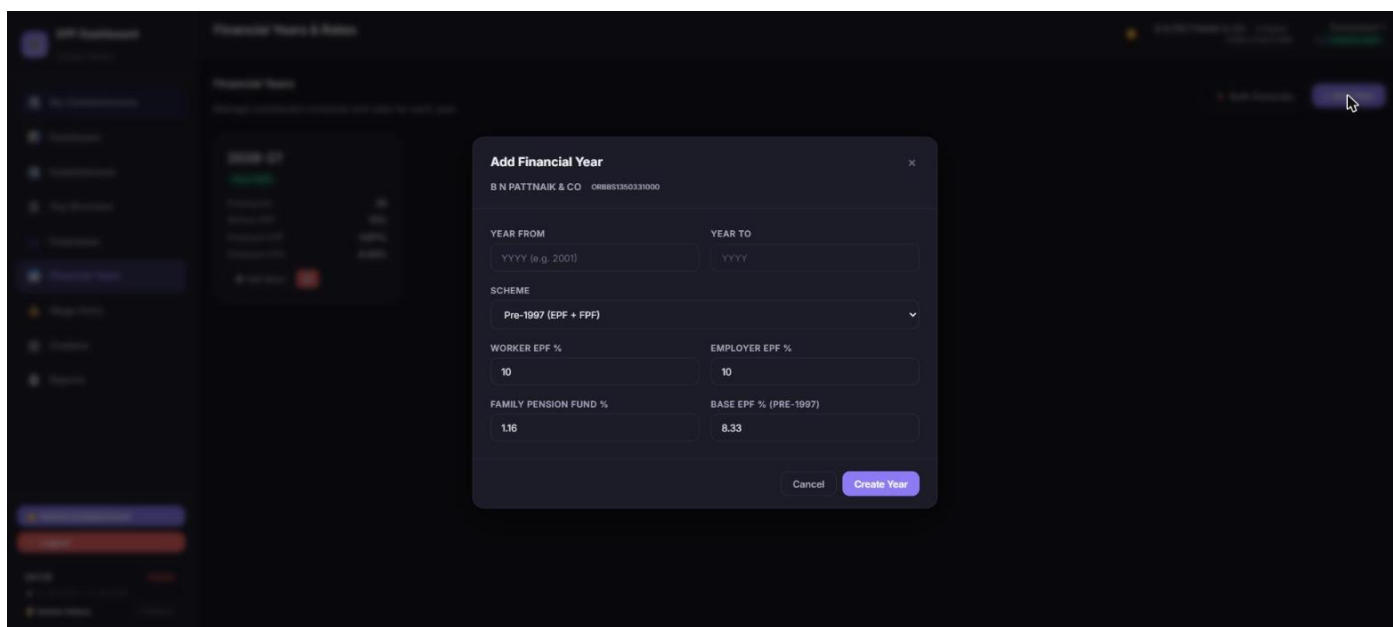
6. Creating a Financial Year Entry

Wages and contributions are always entered against a specific financial year. Go to **Financial Years** in the sidebar to see existing years and their contribution schemes and rates.



Financial Years & Rates — one card per year, showing scheme and rates.

Click **+ Add Year**, enter the Year From / Year To range, and choose the applicable scheme: **Pre-1997 (EPF + FPF)** for years before the Employees' Pension Scheme replaced the Family Pension Fund, or **Post-1997** for later years. The Worker EPF %, Employer EPF %, and Family Pension/Pension Fund % fields pre-fill with the statutory defaults for the scheme — only change them if your establishment has a documented exception. Click **Create Year** when done. Use **Bulk Generate** to create several consecutive years at once with the same scheme.



Add Financial Year form, with scheme selector and rate fields.

The wage-ceiling amount and Account 22 (EDLI Admin) rate that apply to each month are derived automatically from the month's actual calendar date, not just the financial year — you do not need to adjust these manually for statutory rate changes.

7. Wage Entry

Go to **Wage Entry** in the sidebar and pick the financial year from the dropdown at the top. Each employee has a month-by-month table showing Gross Wages, EPF Wages, NCP (Non-Contributing Period) Days, and the resulting Worker/Employer EPF and Pension Fund contributions — these are calculated automatically from the wage figures and the year's rates the moment you enter a value.

Wage Entry

Enter monthly wages. Contributions are calculated automatically based on the statutory rates.

2026-27 Delete All Bulk Import Import Excel + Monthly Wage Entry + Add Employee Wages

Post-1987 Scheme Employee: 12% (EPF) | Employer: 3.67% (EPF) + 8.33% (Pension Fund) = 12% 25 employees this year

FORM 3A PDF **FORM 3A EXCEL** **FORM 6A PDF** **FORM 12A PDF**

Mr. BIJAYA KUMAR NAYAK
 Member ID: 0010047 | UAN: 100604933153
 Father: LATE RAMAKANTA NAYAK | DOB: 08-APR-1962 | Gender: Male | DOJ: 15-APR-2026
 ✓ Age > 58 (EPS=0)

MONTH	GROSS WAGES	EPF WAGES	NCP DAYS	WORKER EPF (12%)	WORKER TOTAL	EMPLOYER EPF (3.67%)	PENSION FUND (EPS) (8.33%)	EMPLOYER TOTAL
Mar Paid in Apr	8130	4065	13	488	488	488	0	488
Apr Paid in May	8130	4065	13	488	488	488	0	488
May Paid in Jun	8130	4065	13	488	488	488	0	488
Jun Paid in Jul	8130	4065	13	488	488	488	0	488
Jul Paid in Aug	8130	4065	13	488	488	488	0	488
Aug Paid in Sep	8130	4065	13	488	488	488	0	488

Per-employee monthly wage table on the Wage Entry page, with Form 3A/6A/12A quick-download buttons above it.

For faster data entry across many employees at once, click **+ Monthly Wage Entry**, choose the month from the dropdown, and enter Gross Wages and NCP Days for each employee in the grid. Tick **Higher EPF (EE) / (ER)** or **Age > 58** per employee where applicable — these checkboxes change how the Pension Fund (EPS) share is computed for that employee that month. **Bulk Import** and **Import Excel** at the top of the Wage Entry page let you upload monthly wage data for many employees from a spreadsheet instead of typing it in by hand.

Monthly Wage Entry — 2026-27

B N PATNAIK & CO 08881358333000

SELECT MONTH: Jul Paid in Aug

Enter UAN to add employee... Add Employee

SL NO.	UAN	NAME & OPTIONS	DAYS IN MTH	NCP DAYS	WORK DAYS	GROSS WAGES	EPF WAGES	EPS WAGES	EE SHARE (12%)	ER PF (3.67%)
1	100604933153	Mr. BIJAYA KUMAR NAYAK Higher EPF (EE) ☐ Higher EPF (ER) ☒ Age > 58 ☒	31	13	18	8130	4065	0	488	488
2	102298890759	Mr. ARABINDA DASH Higher EPF (EE) ☐ Higher EPF (ER) ☐ Age > 58 ☐	31	14	17	5484	2742	2742	329	101
3	102298893623	Mr. DEEPAK KUMAR PATNAIK Higher EPF (EE) ☐ Higher EPF (ER) ☐ Age > 58 ☐	31	6	25	9678	4839	4839	581	178
4	102298885046	Mrs. SUNITA DASH Higher EPF (EE) ☐ Higher EPF (ER) ☐ Age > 58 ☐	31	17	14	4518	2258	2258	271	83
5	102128648002	Mr. SANGRAM KISHOR SWAIN Higher EPF (EE) ☐ Higher EPF (ER) ☐ Age > 58 ☐	31	9	22	8518	4258	4258	511	158
6	101501196804	Mr. SHAKTI PRAKASH PATNAIK Higher EPF (EE) ☐ Higher EPF (ER) ☐ Age > 58 ☐	31	0	31	42000	21000	15000	1800	550

Monthly Wage Entry grid — enter Gross Wages and NCP Days per employee for the selected month.

8. Challans — TRRN & CRRN Entry

Go to **Challans** in the sidebar and select the financial year. Every month with wage data shows its computed remittance breakdown — Gross Wages, EPF Wages, EPS Wages, EDLI Wages, and the exact amount due under Account 1 (EPF), Account 2 (EPF Admin), Account 10 (Pension Fund), Account 21 (EDLI), and Account 22 (EDLI Admin) — computed automatically from that month's wage entries. You cannot edit these amounts directly; correct the underlying wage entries on the Wage Entry page if a total looks wrong.

EPF Dashboard ADMIN PANEL

Form 12A Challans

B N PATTNAIK & CO. Switch ORBES11308131008 Consultant 1

Challans / Remittances

Enter TRRN, CRRN, and Credit Dates for each month. The totals are automatically computed based on wage records.

2026-27

Remittance Entries

Save All Changes

MONTH	TRRN	CRRN	MEMBERS	GROSS WAGES	EPF WAGES	EPS WAGES	EDLI WAGES	A/C 1	A/C 2	A/C 10	A/C 21	A/C 22	TOTAL	CREDIT DATE
Mar Paid in Apr	TRRN	CRRN	22	2,51,840	1,25,920	85,178	1,15,565	20,640	630	7,098	630	0	₹28,998	dd-mm-yyyy
Apr Paid in May	TRRN	CRRN	22	2,51,840	1,25,920	85,178	1,15,565	20,640	630	7,098	630	0	₹28,998	dd-mm-yyyy
May Paid in Jun	TRRN	CRRN	22	2,51,840	1,25,920	85,178	1,15,565	20,640	630	7,098	630	0	₹28,998	dd-mm-yyyy
Jun Paid in Jul	TRRN	CRRN	22	2,51,840	1,25,920	85,178	1,15,565	20,640	630	7,098	630	0	₹28,998	dd-mm-yyyy
Jul Paid in Aug	TRRN	CRRN	22	2,51,840	1,25,920	85,178	1,15,565	20,640	630	7,098	630	0	₹28,998	dd-mm-yyyy
Aug Paid in Sep	TRRN	CRRN	22	2,51,840	1,25,920	85,178	1,15,565	20,640	630	7,098	630	0	₹28,998	dd-mm-yyyy
Sep Paid in Oct	TRRN	CRRN	0	0	0	0	0	0	0	0	0	0	₹0	dd-mm-yyyy
Oct Paid in Nov	TRRN	CRRN	0	0	0	0	0	0	0	0	0	0	₹0	dd-mm-yyyy
Nov Paid in Dec	TRRN	CRRN	0	0	0	0	0	0	0	0	0	0	₹0	dd-mm-yyyy
Dec Paid in Jan	TRRN	CRRN	0	0	0	0	0	0	0	0	0	0	₹0	dd-mm-yyyy

Switch Establishment Logout

v2.1.0 11-08-2026 — 10-09-2026 Present 4 Releases

Challans / Remittances page, with the TRRN and CRRN entry fields for each month.

After you remit the month's contribution through the EPFO unified portal, come back here and enter the **TRRN** (Temporary Return Reference Number) and **CRRN** (Challan Receipt Reference Number) issued by EPFO for that month in the corresponding fields, plus the credit date. These numbers are printed on the statutory annual returns, so they should be entered accurately before generating Form 3A / 6A / 12A for year-end filing.

EPF Dashboard ADMIN PANEL

Form 12A Challans

B N PATTNAIK & CO. Switch ORBES11308131008 Consultant 1

Challans / Remittances

Enter TRRN, CRRN, and Credit Dates for each month. The totals are automatically computed based on wage records.

2026-27

Remittance Entries

Save All Changes

MONTH	TRRN	CRRN	MEMBERS	GROSS WAGES	EPF WAGES	EPS WAGES	EDLI WAGES	A/C 1	A/C 2	A/C 10	A/C 21	A/C 22	TOTAL	CREDIT DATE
Mar Paid in Apr	TRRN20260301123	CRRN9975432	22	2,51,840	1,25,920	85,178	1,15,565	20,640	630	7,098	630	0	₹28,998	dd-mm-yyyy
Apr Paid in May	TRRN	CRRN	22	2,51,840	1,25,920	85,178	1,15,565	20,640	630	7,098	630	0	₹28,998	dd-mm-yyyy
May Paid in Jun	TRRN	CRRN	22	2,51,840	1,25,920	85,178	1,15,565	20,640	630	7,098	630	0	₹28,998	dd-mm-yyyy
Jun Paid in Jul	TRRN	CRRN	22	2,51,840	1,25,920	85,178	1,15,565	20,640	630	7,098	630	0	₹28,998	dd-mm-yyyy
Jul Paid in Aug	TRRN	CRRN	22	2,51,840	1,25,920	85,178	1,15,565	20,640	630	7,098	630	0	₹28,998	dd-mm-yyyy
Aug Paid in Sep	TRRN	CRRN	22	2,51,840	1,25,920	85,178	1,15,565	20,640	630	7,098	630	0	₹28,998	dd-mm-yyyy
Sep Paid in Oct	TRRN	CRRN	0	0	0	0	0	0	0	0	0	0	₹0	dd-mm-yyyy
Oct Paid in Nov	TRRN	CRRN	0	0	0	0	0	0	0	0	0	0	₹0	dd-mm-yyyy
Nov Paid in Dec	TRRN	CRRN	0	0	0	0	0	0	0	0	0	0	₹0	dd-mm-yyyy
Dec Paid in Jan	TRRN	CRRN	0	0	0	0	0	0	0	0	0	0	₹0	dd-mm-yyyy

Switch Establishment Logout

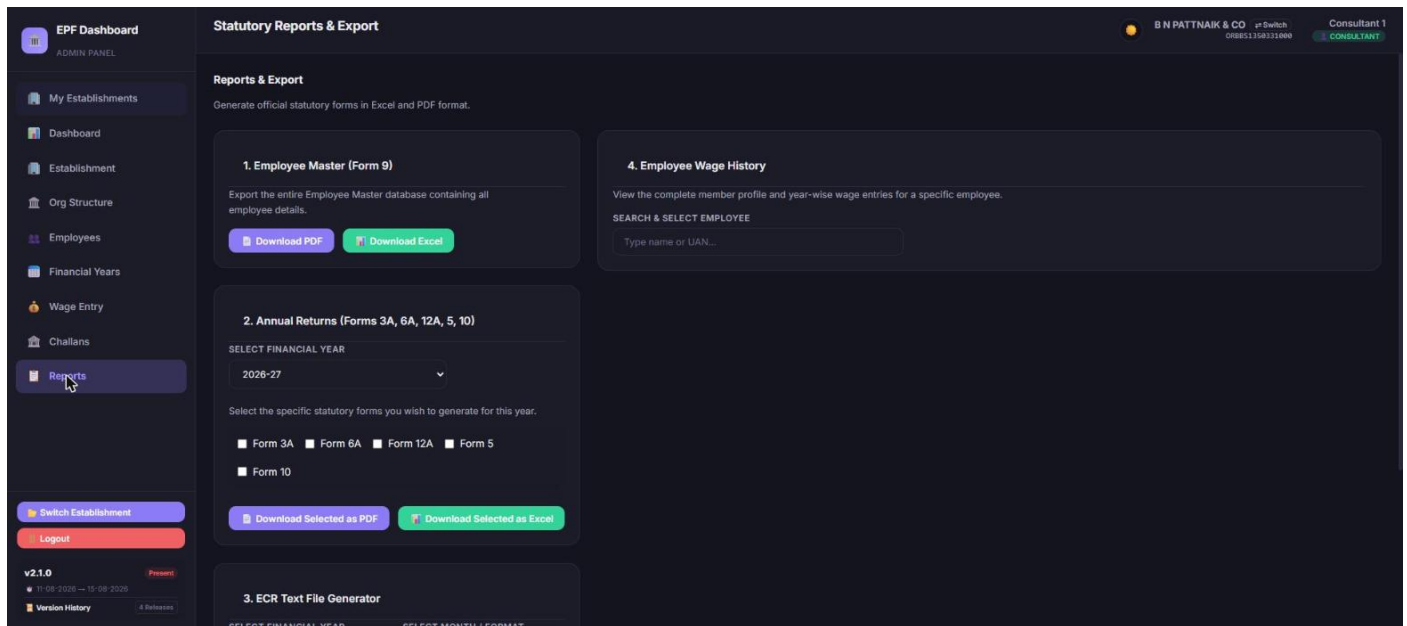
v2.1.0 11-08-2026 — 10-09-2026 Present 4 Releases

Entering a TRRN and CRRN for a month. Click Save All Changes to persist the entries for the year.

Remember to click **Save All Changes** at the top of the table after entering TRRN/CRRN/credit-date values — navigating away without saving discards unsaved entries on this page.

9. Generating Statutory Reports

Go to **Reports** in the sidebar. Four sections are available:



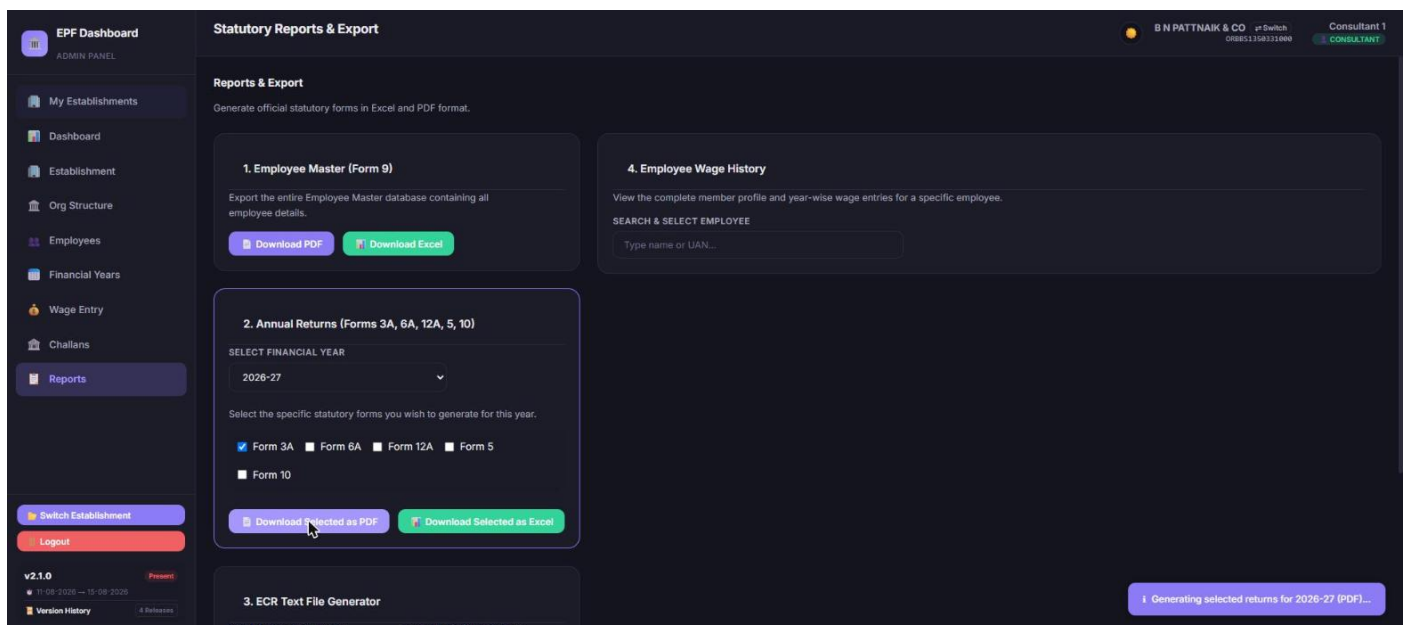
Reports & Export page: Employee Master (Form 9), Annual Returns, ECR Text File Generator, and Employee Wage History.

Employee Master (Form 9): exports the full Employee Master as PDF or Excel.

Annual Returns (Forms 3A, 6A, 12A, 5, 10): pick the financial year, tick the specific forms you need (all five start unticked by default — select only what you actually need to generate), then click **Download Selected as PDF** or **...as Excel**.

ECR Text File Generator: generates the EPFO v3.0 Electronic Challan cum Return text file for a specific month, ready for direct upload to the EPFO unified portal.

Employee Wage History: search for a single employee to view and download their complete year-by-year wage and contribution history as a PDF.



A report download in progress, shown via the confirmation toast in the bottom-right corner.

10. Subscription Fees & Making Payments

Using this platform carries a small monthly subscription fee per establishment, based on the number of employees with wage data that month. If a month's fee becomes overdue (one day past month end) and remains unpaid, report and ECR downloads for that establishment are blocked until payment is made — superadmin accounts are exempt from this restriction. When you attempt an affected download, a payment modal opens letting you pay that month's fee via Cashfree before the file downloads.

Subscription History. From **My Establishments**, click **Subscription History** on any establishment card to see every month's fee, whether it was paid via Cashfree or from advance credit, the payment date, and reference number, plus your running Advance Credit balance.

The screenshot displays the 'Subscription History' page for establishment B N PATTNAIK & CO. The left sidebar contains navigation links: My Establishments, Dashboard, Establishment, Org Structure, Employees, Financial Years, Wage Entry, Challans, and Reports. The main content area shows the 'Subscription History' for the establishment. At the top, it displays the 'ADVANCE CREDIT BALANCE' as ₹3,460, with a note that ₹5,000 topped up all-time and auto-applies to future months. Below this is a 'TOP-UP HISTORY' table with one entry: ₹5,000 paid via Cashfree on 15-08-2026. The main section is 'Monthly Fee Payments' with a table showing fees for August 2026 (₹220), July 2026 (₹440), June 2026 (₹440), May 2026 (₹440), and April 2026 (₹440). The table columns are MONTH, EMPLOYEES, RATE, AMOUNT PAID, PAID VIA, PAID DATE, and REFERENCE.

MONTH	EMPLOYEES	RATE	AMOUNT PAID	PAID VIA	PAID DATE	REFERENCE
August 2026 FY 2026-27	22	₹10	₹220	Advance Credit	—	Applied from advance credit
July 2026 FY 2026-27	22	₹20	₹440	Cashfree	15-08-2026	7654976
June 2026 FY 2026-27	22	₹20	₹440	Cashfree	15-08-2026	7654993
May 2026 FY 2026-27	22	₹20	₹440	Advance Credit	—	Applied from advance credit
April 2026	22	₹20	₹440	Advance Credit	—	Applied from advance credit

Subscription History page — Advance Credit balance, top-up history, and per-month fee payments.

Advance Credit. To prepay a lump sum that automatically covers future months as wage data is entered (so you are not interrupted by a payment prompt mid-task), click **Add Advance Credit** on the establishment card or on its Subscription History page, enter the amount, and click **Pay via Cashfree**. You will be taken to the Cashfree checkout page to complete the payment; the app automatically brings you back and updates your balance once payment is confirmed.

The screenshot shows the 'Add Advance Credit' modal. The modal has a title 'Add Advance Credit' and a subtitle 'B N PATTNAIK & CO'. It contains a paragraph: 'Prepay a lump sum toward B N PATTNAIK & CO's future subscription fees. It's automatically applied to upcoming months as their wage data is entered — no manual tracking needed.' Below this are two input fields: 'AMOUNT (₹)' with a placeholder 'e.g. 5000' and 'NOTES (OPTIONAL)' with a placeholder 'e.g. Lump sum for Apr-Jun'. At the bottom are two buttons: 'Cancel' and 'Pay via Cashfree'.

Add Advance Credit modal — prepay a lump sum against future monthly fees.

11. How Data Is Saved

This application has no separate “Save File” step — it is a web app, and every screen saves directly to the server as soon as you submit a form or click a save/update button:

- Establishment Profile: click **Save Details**.
- Employees, Financial Years: saved immediately when you click Create/Update in the form.
- Wage Entry: each value is saved as you enter it in the per-employee table, or when you submit the Monthly Wage Entry grid.
- Challans (TRRN/CRRN/credit date): you must explicitly click **Save All Changes** — this is the one screen where edits are not saved automatically as you type.

Because everything is saved to the server immediately, closing the browser tab does not “lose without saving” the way a desktop application would — any change you have already submitted is already stored. Reports and ECR files, once downloaded, are separate files on your own computer and are not stored or re-downloadable from the app — keep your own copies for filing records.

12. What You Should NOT Do

- **Do not share login credentials** between staff members. Each consultant account is tied to a specific set of establishments; sharing a login removes any ability to know who made a given change.
- **Do not manually edit a downloaded ECR text file.** It is generated in the exact fixed format EPFO's portal expects; hand-editing it risks a malformed upload that the portal will reject or misprocess. If a figure in it is wrong, correct the wage entry in the app and re-generate the file.
- **Do not enter or change TRRN/CRRN/credit-date values from memory.** Enter them only from the actual challan receipt issued by EPFO after remittance — these numbers are printed on statutory annual returns (Form 3A/6A) and must match EPFO's own records.
- **Do not override the Higher EPF (EE)/(ER) or Age > 58 checkboxes** on the Wage Entry page unless the employee has formally opted for it, or has genuinely crossed the relevant age — these directly change how the Pension Fund (EPS) share is calculated for that employee and can misstate statutory liability if set incorrectly.
- **Do not ignore the subscription-fee payment prompt.** Report and ECR downloads for a month are blocked once that month's fee is overdue and unpaid; the modal that appears is the fastest way to clear it and resume the download, rather than assuming it is an error.
- **Do not leave Challans edits unsaved.** Unlike other pages, TRRN/CRRN/credit-date entries on the Challans page are only persisted when you click **Save All Changes** — navigating away first discards them.
- **Do not delete a Financial Year or an Employee record** that already has wage history or has been used to generate filed statutory returns, without being certain it is safe to do so — this removes the underlying data those returns were built from and cannot be undone from within the app.
- **Do not assume a report download always “just works.”** If a download fails or behaves unexpectedly, check the subscription-fee banner at the top of the Challans/Reports pages first, and verify the financial year and month selected are the ones you intend.