

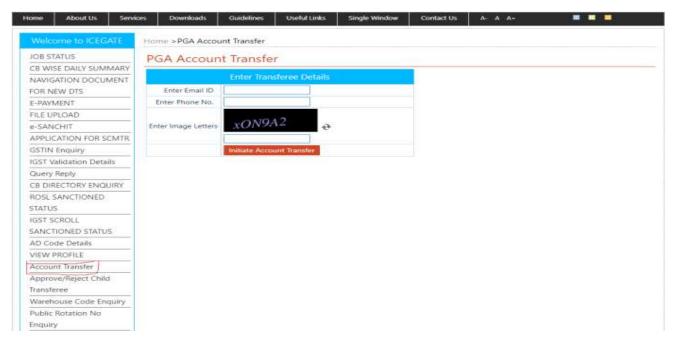
## Advisory for ICEGATE Account Transfer Functionality for PGA user's

Using **PGA ICEGATE Account Transfer** functionality, a PGA user(transferor) is able to transfer his/her ICEGATE ID to a new ICEGATE PGA user(transferee). This functionality is available under ICEGATE login for parent and child ICEGATE(PGA) users.

## **❖** Account Transfer Process for Child PGA ICEGATE USER

#### Step 1:

➤ Login into ICEGATE. On left panel click on Account Transfer, PGA Account Transfer page appears



**Step 2:**Enter transferee Email ID and Phone number of the transferee and click on Initiate Account Transfer.

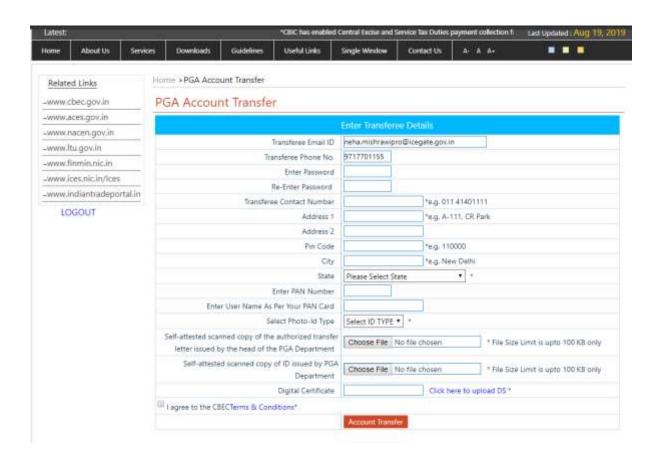




The transferee will receive User Name and temporary password over email and phone number entered by the transferor in PGA Account Transfer screen. The transferor can initiate many account transfer request till the transferee does not logs into ICEGATE and completes the transfer process.

### Step 3:

The transferee logs into ICEGATE using User Name and temporary password shared over email and phone.



The transferee lands on the above screens. In the above screen email id and phone number of the transferee gets pre populated. Transferee fills all the information required in the above form. The transferee needs to follow below instructions:

- 1. PAN number should be valid.
- 2. User Name must be as per PAN entered.
- 3. Transfer letter, PGA id and Identification document uploaded must be in pdf format.
- 4. Transfer letter, PGA id and Identification document uploaded should not exceed 100 KB.
- 5. Name of transfer letter document uploaded should not exceed 28 characters.
- 6. Name of PGA id document uploaded should not exceed 28 characters.
- 7. Name of identification document uploaded should not exceed 28 characters.

When user clicks on Account Transfer,

- An OTP is sent to the transferee over email and phone number
- The transferee navigates to the OTP page as below:





• After OTP validation following screen appears



## Note: At this point

- 1. The PGA Account Transfer request is submitted for approval at ICEGATE admin.
- 2. The transferor will not be able to initiate any transfer request until the last request gets approve/rejects.
- 3. If the transferee logs into ICEGATE using User Name (ICEGATE Id) and password (he had set) and if the request has not been approved yet, below screen appears





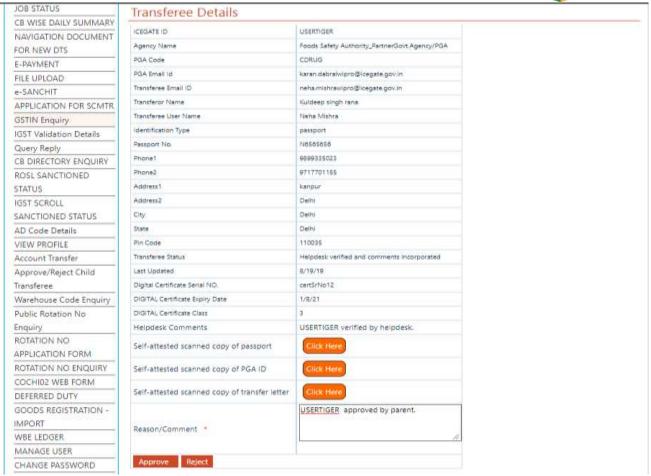
- 4. The transferee will not be able to login using User name (ICEGATE Id) and temporary password.
- 5. The parent ICEGATE user of the transferor needs to approve/reject the transfer request once the request is verified by ICEGATE helpdesk.
- 6. The parent ICEGATE user of the transferor will receive an email for approve/reject the transfer request on its registered email id at ICEGATE.

**Step 4:**Parent of the transferor logs into ICEGATE. On the left panel he/she clicks on Approve/Reject Child Transferee, following screen appears:



In above screen parent of the transferor clicks on View button





If the parent ICEGATE user of the transferor rejects the transfer request, the transferee and the transferor will receive notification about the rejection. At this point the transferor will be able to initiate a fresh account transfer request.

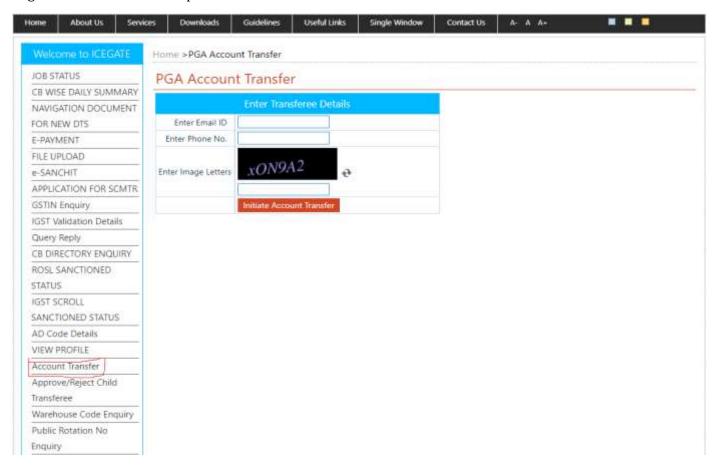
### Step 5:

- 1. If the parent of transferor approves the transfer request, the request goes for ICEGATE admin approval.
- 2. If ICEGATE admin approves the transfer request
  - a) The transferor and the transferee will receive notification for the same.
  - b) The transferor will not be able to login into ICEGATE.
  - c) The transferee will be able to login using User name (ICEGATE Id) and password (he/she had set while uploading documents)
- 3. If ICEGATE admin rejects the transfer request, the transferor and the transferee will receive email about the same and the transferor may initiate a fresh account transfer request.

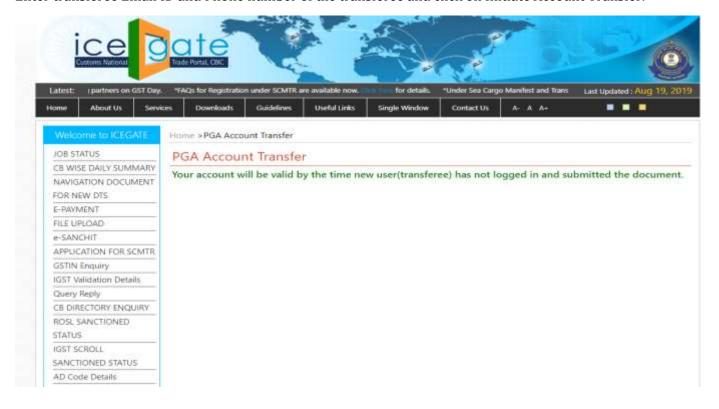


## **Account Transfer Process for Parent PGA ICEGATE USER**

# **Step 1:** Login into ICEGATE. On left panel click on Account Transfer



**Step 2:** Enter transferee Email ID and Phone number of the transferee and click on Initiate Account Transfer.

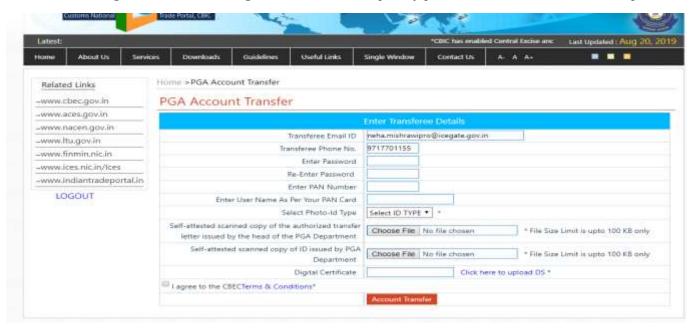




The transferee will receive User Name and temporary password over email and phone number entered by the transferor in above screen. The transferor can initiate many transfers till the transferee does not logs into ICEGATE and completes the transfer process.

### Step 3:

The transferee logs into ICEGATE using User Name and temporary password shared over email and phone.



The transferee lands on the above screens. Transferee fills all the information required in the above form. The transferee needs to follow below instructions:

- 1. PAN number should be valid
- 2. User Name must be as per PAN entered.
- 3. Transfer letter, PGA id and Identification document uploaded must be in pdf format.
- 4. Transfer letter, PGA id and Identification document uploaded should not exceed 100 KB.
- 5. Name of transfer letter document uploaded should not exceed 28 characters.
- 6. Name of PGA id document uploaded should not exceed 28 characters.
- 7. Name of identification document uploaded should not exceed 28 characters.

### When user clicks on Account Transfer,

- An OTP is sent to the transferee over email and phone number
- The transferee navigates to the OTP page as below:





## After OTP validation following screen appears



### Note: At this point

- 1. The PGA Account Transfer request is submitted for approval at ICEGATE admin.
- 2. The transferor will not be able to initiate any transfer request until the last request gets approve/rejects.
- 3. If the transferee logs into ICEGATE using User Name (ICEGATE Id) and password (he had set) and if the request has not been approved yet, below screen appears



4. The transferee will not be able to login using User name (ICEGATE Id) and temporary password.

### Step 4:

- 1. If ICEGATE admin approves the transfer request
  - a) The transferor and the transferee will receive notification for the same.
  - b) The transferor will not be able to login into ICEGATE.
  - c) The transferee will be able to login using User name (ICEGATE Id) and password (he/she had set while uploading documents)
- 2. If ICEGATE admin rejects the transfer request, the transferor and the transferee will receive email about the same and the transferor may initiate a fresh account transfer request.