

# **PRE-REQUISITES**

Registering - ECSIN / UDIN / FORM D - as applicable







Oredit / Debit or Net-banking

## PREREQUISITE

#### MEMBERS ARE REQUESTED TO FULFILL THE FOLLOWING REQUIREMENTS BEFORE PROCEEDING

**ECSIN:** Member who are in **employment** are required to register at **eCSin** portal at the link <u>https://stimulate.icsi.edu/e</u> <u>csin</u> **UDIN:** Member who are holding valid **Certificate of Practice** are required to register mandatorily at UDIN portal at the link https://stimulate.icsi.edu/ udin

FORM D: Members holding Valid Certificate of Practice are also required to fill & submit online form D for renewal of COP before proceeding

## **ECSIN** Applicable for Member in employment (not in Practice)

#### MEMBER UNLESS EXEMPTED HAS TO MANDATORILY GENERATE ECSIN AT THE TIME OF APPOINTMENT AS WELL AS RESIGNATION

#### **Procedure of Online Registration for ECSIN**

- Step 1: Click on the "Membership Registration" menu on the ECSIN portal. <u>https://stimulate.icsi.edu/ecsin</u>
- Step 2: Opt either ACS or FCS and fill membership number & DOB and click on "Submit" button.
- Step 3: Create Password
- Step 4: Login by filling the user name & password and clicking on "Login" button.
- **Step 5:** fill all the fields of the eCSIN generation.
- Step 6: Click on "Generate eCSIN" button.

## **ECSIN** Applicable for Member in employment (not in Practice)

#### MEMBER CAN AVAIL EXEMPTION IF THEY ARE FROM BELOW CATEGORY

#### **CATEGORIES:**

Sitting Members of Parliament or of any State or UT Legislative Assembly

Serving Members of Judiciary/Tribunals and Quasi Judicial Bodies

Serving Members of Civil Services and allied disciplines

Serving Members of Armed Forces and Paramilitary forces

Serving Diplomats

Members in permanent employment with Central Government, State Government(s), Regulatory Bodies, Government Organizations

Members registered with any registered Bar Council of India.

Members holding Certificate of Practice issued by any other professional bodies in India

Unemployed

Guideline available at ECSIN portal <u>https://stimulate.icsi.edu/ecsin/PDF/eCSIN-Guidlines.pdf</u>

#### **UDIN** Mandatorily applicable only for Members in Practice (COP Holders)

UNIQUE DOCUMENT IDENTIFICATION NUMBER (UDIN) IS SYSTEM GENERATED RANDOM ALPHANUMERIC NUMBER, WHICH DEFINES THE AUTHENTICITY OF DOCUMENTS ISSUED BY COMPANY SECRETARY IN PRACTICE.

#### **Procedure of Online Registration for UDIN**

- Step 1: Click on the "Membership Registration" menu on the UDIN portal.
- Step 2: Opt either ACS or FCS and fill membership number & DOB and click on "Submit" button.
- Step 3: Create Password
- Step 4: Login by filling the user name & password and clicking on "Login" button.
- Step 5: Login with valid credential, Fill details like: Name of Company/Firm/ Individual, CIN No.,
- Step 6: Select document type Fill date of signing and click on "Generate UDIN"
- Only Members with a valid Certificate of Practice can register at UDIN Portal
- For more details please visit <u>https://stimulate.icsi.edu/udin</u> & refer guideline <u>https://stimulate.icsi.edu/udin/PDF/UdinGuidelines.pdf</u>

## **FORM D** Mandatorily applicable only for Member in Practice (COP Holders)

#### For the Issue/Renewal/Restoration of Certificate of Practice.

#### **Procedure for filling Online Form D:**

- **Step 1** Login with member account
- Step 2 Click on "Manage Account" under members tab
- Step 3 Click on "Online form D"
- **Step 4** First fill the "**Personal Details**" tab and click save as draft
- **Step 5** Fill **"Area of practice"** tab, select at least one field of your area of interest and click save as draft
- **Step 6** Fill "Verification details" and click save as draft (this page is important) and please fill all the mandatory fields carefully.
- **Step 7** Last page is **"Declaration"**, fill the place and date and click save as draft option.
- **Step 8** At the end please click the 'Final save & Print' button and keep a copy of the Form-D for your records.

(Please fill and submit the form in one go. Once the form D is submitted, modifications cannot be done)

It is mandatory to fill the online Form D each year before proceeding for paying the annual membership fee.

## **PCH** Applicable for all members

Every Company Secretary in practice or in employment is required to achieve the Programme Credit Hours (PCH) as per the guidelines issued by ICSI

#### The requirement of compulsory PCH shall not apply to :

- (a) A member who attains the age of 65 years during a particular calendar year.
- (b) A member, for the year during which he gets his Certificate of Practice for the first time.
- (c) A member or class of members to whom the Council may in its absolute discretion grant full/partial exemption either specific/general, on account of facts and circumstances in case of :
  - •Maternity / Paternity Leave
  - Accident/Medical Emergencies
  - •Unemployment
  - •Any other case, as may be deemed appropriate by the Council on a case to case basis.

•If there is any query/discrepancy related to the program credit hours, send an email at <u>cpe@icsi.edu</u> The concerned officer / department will respond to the matter

## PAN & AADHAAR NO. mandatory

#### It is mandatory to fill PAN Number and AADHAAR Number by every member

In case member not having PAN or Aadhaar, He / She may write PAN as ZZZZZZZZZZZZZZ and Aadhaar as 12 timed 9 (9999999999999), which is self certification for not having such documents.

You can update GSTIN/ PAN/ Aadhaar number permanently in Institute's record

Go to Manage Account

Then click on Update PAN/Aadhar card/GSTIN No.

Fill PAN, AADHAAR & GST details

Click on Save button

## **GSTIN / NAME** TO BE REFLECTED ON THE RECEIPT: • optional

For getting GSTIN number on receipt for taking tax input credit

Members are required to enter their GSTIN number in the relevant field at the time of making the payment.

No request is entertained to provide the GSTIN number on receipt at a later stage i.e. once payment is made.

Member also can write their company/firm name at the option given for same at the payment screen.

## **ADDRESSES** (Professional and Residential)

# As per CS Regulations, 1982, members address should be updated

Member's registered Professional and Residential address are displayed on the payment screen. In case address seems incomplete / incorrect, update the address by clicking on "Update Address" link provided.

#### You may also update your address using online services of the Institute in the following way:

Click Change of Address under Manage Account option

Select the professional / residential option

Click Go button

**Click Submit button** 

#### **PAYMENT GATEWAY**

Two payment gateway service provided by HDFC and ICICI for Credit, Debit and Netbanking

Please select any one payment gateway service provider by clicking in check box

Different type of payment mode i.e. Debit Card/ Credit Card or Internet banking option will be shown at next screen

Member can choose Debit Card/ Credit Card or Internet banking option by selecting option of his / her choice.

#### All information in Hand and Pre-Requisites Complete

#### LETS PAY THE FEES

## **PLEASE NOTE:**

# The "Proceed for Payment" button will only be activated after filling all the fields

It is mandatory to fill all the information give at payment screen

While depositing the annual membership fee, the member has to fill the information about his / her Employment, ECSIN, UDIN, PCH hours, "Exemption in ECSIN / PCH - if applicable", PAN, Aadhaar, Address, GST etc carefully.

The amount paid by the member may not immediately sync. Sync occurs automatically after some time. In some cases it may take 24 to 48 hours

## HOW TO LOGIN at membership portal

Visit https://www.icsi.edu, CLICK on "Online Services" tab, CLICK on "Member", Fill user name & password, CLICK on "Login. Go to "Manage Account" under members tab, CLICK on "Annual Membership Fee" for remitting fees.

#### In case you don't have password, you may retrieve the Password.

- Click to retrieve password
- Enter your Username/ Membership no. (eg. A1234 or F1234)
- Again click on retrieve password

Your password will be sent to your registered email id and mobile number. You can check your registered email and mobile number at "Member Search" option at website.

The members who do not have registered email id & mobile number may make the request to update mobile/email Id on <a href="http://support.icsi.edu">http://support.icsi.edu</a> by attaching scanned copy of Photo ID proof.

## PAYMENT SCREEN (ECSIN)

	eCSIN:		$\leftarrow$	If empty (and not exempted),
-	Confirm that Is there any change in your employment since generation of eCSIN	OYes ◉No	←.	first register on the ECSIN portal. Click yes if any change in employment after generation of ECSIN else click No
	PCH completed in FY 2019-2020:	8	⇐.	Your PCH details shown here.
For Member not in Practice eCSIN	PCH completed in block 2017-2020:	8		You cannot change it
	Are you Exempted from eCSIN	<ul> <li>● Yes ○ No</li> <li>Serving Members of J ✓</li> <li>Details on the basis of exemption:*</li> <li>Fill Remarks here</li> </ul>	←.	If you fall in the exempted category, click Yes and select the category and fill remarks (filling remark is mandatory)
	Whether Form DIR12 was filed for the same employment:	● Yes ○ No	←.	Select Yes/No
	Are you Exempted From PCH:	● Yes ○ No Select ✓	<i>—</i> ·	If yes, choose category from dropdown menu
PAN (in capital letters)*	AC		<u> </u>	Fill your PAN & Aadhaar No
Aadhaar No.*	97 3			here (mandatory fields)

## PAYMENT SCREEN (ECSIN)

GSTIN (Fill your GST				
Number to claim GST Input				
Tax Credit).		$\langle$		
If GST No is not given here, it				
will not be reflected in the				
receipt.				
Name to be reflected on the		$\leftarrow$		
receipt:				
Professional Address	the second secon	6		
	Update Address			
	5			
Residential Address	Martin Drawn Drawn and Andrews	and a second li		
	Update Address			
Amount (Including GST @				
18%)	2950			
Choose Payment Gateway	HDFC Bank     O ICICI Bank	$\leftarrow$		
	I declare that I am submitting this fees/application on my own behalf.			
<ul> <li>I declare that the information given by me herein above and both the Professional and Residential Address, email, mobile are true to the best of my knowledge and updated and in case any of the information / statement furnished is found to be false / misleading, then I understand that the Institute can take disciplinary action against me on grounds of professional misconduct in terms of clause 2 of Part-III of the First Schedule and/or clause 3 of Part-II of the Second Schedule under the Company Secretaries Act, 1982 as amended time to time.</li> <li>The Payment button will only show if all pre requisites are in place.</li> </ul>				
	Proceed for Payment	$\leftarrow$		

- Fill your GST No. here to avail credit input (optional)
- Optional field for print "alias" in receipt. Do not fill if GST No left blank
- Registered address show here. If seems incomplete / incorrect, please update by clicking on "Update Address" link
- The total payable amount appears here.
- Choose any one payment gateway.
- Select both declarations

The payment button will be activated only after filling all the above fields.

## PAYMENT SCREEN (UDIN)

For Member in Practice UDIN	UDIN:	UDIN Registered		
	PCH completed in FY 2019-2020:	40		
	PCH completed in block 2017-2020:	64		
	COP NO:	(C)()		
	Are you Exempted From PCH:	● Yes ○ No Maternity / Paternity Leave ✔		
	Enter Letter Date Issued By ICSI:*	DD/MM/YYYY		
PAN (in capital letters)*	A. A			
Aadhaar No.*				
GSTIN (Fill your GST Number to claim GST Input Tax Credit). If GST No is not given here,it will not be reflected in the receipt.				
Name to be reflected on the receipt:				
Professional Address	.Phone: Email: - @yahoo.com			
Residential Address	NEW DELHI 110058			

- Your UDIN status shows here (mandatory to register for COP Holders)
- Your PCH details shown here. You cannot change it
- Your COP No. shown here.
- If you fall in the exempted category, click Yes and select the category and fill remarks
- Fill your PAN & Aadhaar Number here (mandatory fields)
- Fill your GST No. here to avail credit input (optional)
- **Optional field for print "alias" in receipt**
- Registered address shown here. If seems incomplete / incorrect, please update by clicking on "Update Address" link

## PAYMENT SCREEN (UDIN)

Amount (Including GST @ 18%)	3540 "Annual fee for renewal of COP is not included in this payment. The same can be paid using option'Request relating to Certificate of Practice' after filling Online FormD only after making the payment of Annual Membership fee"	• The total payable amount appears he (Excluding COP fee)
	Include COP Fee	Click in checkbox to include COP fee
Choose Payment Gateway	HDFC Bank O ICICI Bank	Choose any one payment gateway
	I declare that I am submitting this fees/application on my own behalf.	
	I declare that the information given by me herein above and both the Professional and Residential Address, email, mobile are true to the best of my knowledge and updated and in case any of the information / statement furnished is found to be false / misleading, then I understand that the Institute can take disciplinary action against me on grounds of professional misconduct in terms of clause 2 of Part-III of the First Schedule and/or clause 3 of Part-II of the Second Schedule under the Company Secretaries Act, 1982 as amended time to time.	• Select both declarations
	Proceed for Payment	<ul> <li>The payment button will be activated only after filling all the above fields.</li> </ul>

#### **PAYMENT SCREEN** (COMMON) AFTER CLICK ON PROCEED FOR PAYMENT

ot secure | icsi.in/student/Members/MyAccount/tabid/127/ctl/IcsiAccount/mid/432/Default.aspx



#### **PAYMENT SCREEN** (COMMON) AFTER CLICK ON PROCEED FOR PAYMENT



#### **PAYMENT GATEWAY SCREEN**

ation	ORDER DETAILS	6
> Card Number	Order #:	42337
DumCió 🚭 RuPay» VISA	Order Amount	1770
Expiry Date CVV Month V Year V	Total Amount	INR 1770.0
I agree with the Privacy Policy by proceeding with this payment. INR 1770.00 (Total Amount Payable)		
Make Payment Cancel		
Members can pay online fee by using any bank's DEBIT CAF	RD, CREDIT CARD or	NET BANKING
Members can pay online fee by using any bank's DEBIT CAF	RD, CREDIT CARD or	NET BANKIN(
	<ul> <li>Card Number</li> <li>Expiry Date</li> <li>Month</li> <li>Year</li> <li>Tagree with the Privacy Policy by proceeding with this payment.</li> <li>INR 1770.00 (Total Amount Payable)</li> <li>Make Payment</li> <li>Cancel</li> </ul>	Card Number Card Number Expiry Date North Vear CVV Month Vear CVV I agree with the Privacy Policy by proceeding with this payment. INR 1770.00 (Total Amount Payable) Make Payment Cancel



English

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4233799

1770.00

INR 1770.00



#### HOW TO GENERATE DUPLICATE RECEIPT

In case payment receipt not generated after making the payment. Members can generate duplicate acknowledgement receipt by following below steps.

Go to "Manage Account"

Click on "Duplicate Acknowledgment",

choose field and click on **Submit** 

Place Your Request	Duplicate Acknowledgment Generation
Online FORMD	
• <u>Update</u> <u>PAN/Aadhar</u> <u>card/GSTIN No</u>	99931677   1125   Annual Membership Fees   Jun 29 2012 3:06PM           9990052987   2950   Annual Membership Fee   May 20 2020 4:11PM           99612301   1148   Annual Membership Fees   Jun 24 2011 2:28PM           Amount/           991358921   1125   Annual Membership Fees   Jun 6 2013 2:13PM
<ul> <li><u>List of</u> <u>Unsuccessful</u> <u>Transactions</u></li> </ul>	Date of Payment
<u>Request relating</u> <u>to Certificate of</u>	Please Select the Data as shown above and click on the Submit button. Submit

HAVE ANY QUERIES / COMPLAINTS? Please use Support Portal at the following link : <u>http://support.icsi.edu</u> It is reiterated that the support portal is the ONLY mode of communication with the Institute and queries/ complaints

#### HOW TO REGISTER A COMPLAINT / QUERY AT SUPPORT PORTAL

Visit <u>http://support.icsi.edu</u>, Fill all the mandatory fields and submit the form.

Use Guest option to login on the portal, Ensure you give Membership Number, Mobile Number, Email Address when giving your query. You may attach any file or screenshot with your query for better description and PRIORITY handling.

HOME CSEET REGISTRATION STUDENT+ COM	PLAINT+ COUNSELLOR REGISTRATION+ PRINT	RECEIPT ECART+ CS JOURNAL+	
AINING AUTOMATION PORTAL HELP+			
Register a complaint			
		* Mandatory Field	ds
Suest User ○ Registered User			
First Name *			
Middle Name			
Last Name			
Email Id *			
Confirm your Email Id *		_	
Date of Birth *			
Country *	Select Country		

#### **HAVE ANY QUERIES / COMPLAINTS?** Please use Support Portal at the following link : <u>http://support.icsi.edu</u> It is reiterated that the support portal is the ONLY mode of communication with the Institute and gueries/ complaints

#### HOW TO TRACK A COMPLAINT / QUERY TO SEE THE SOLUTION PROVIDS Visit <u>http://support.icsi.edu</u>, Click at Complaint tab then select Track complaint Search the complaint by mobile no, email id or complaint no, then Click on Search button

IOME CSEET REGISTRATION STUDENT	COMPLAINT- COU	NSELLOR REGISTRATION	+ PRINT RECEIPT ECAR	+ CSJOURNAL+ TRAIN	NING AUTOMATION PORTA
IELP+	REGISTER A COMPL	AINT			
Search Criteria	TRACK COMPLAINT				
Mobile Number		Em	ail Id		
Complaint Number				Search	Clear
Search Result				Total Records: 0 F	Page Size 20 🗸
COMPLAINT NUMBER 🔻	ТОРІС 🔻	SUB TOPIC 🔻	OPENING DATE	CLOSING DATE	STATUS 🔻
No records Found					



Team ICSI The Institute of Company Secretaries of India C-36, Sector-62, NOIDA, UP 201 309 <u>http://Support.icsi.edu</u>; 0120-4522000