



User Manual of UDIN Portal

Organization: ICAI (Institute of Chartered Accountants of India)

Document Release Note

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1	TCS	Prepared	1.0	03.08.2025	First draft
2	UDIN Secretariat	Reviewed	1.1	13.08.2025	Reviewed complete draft
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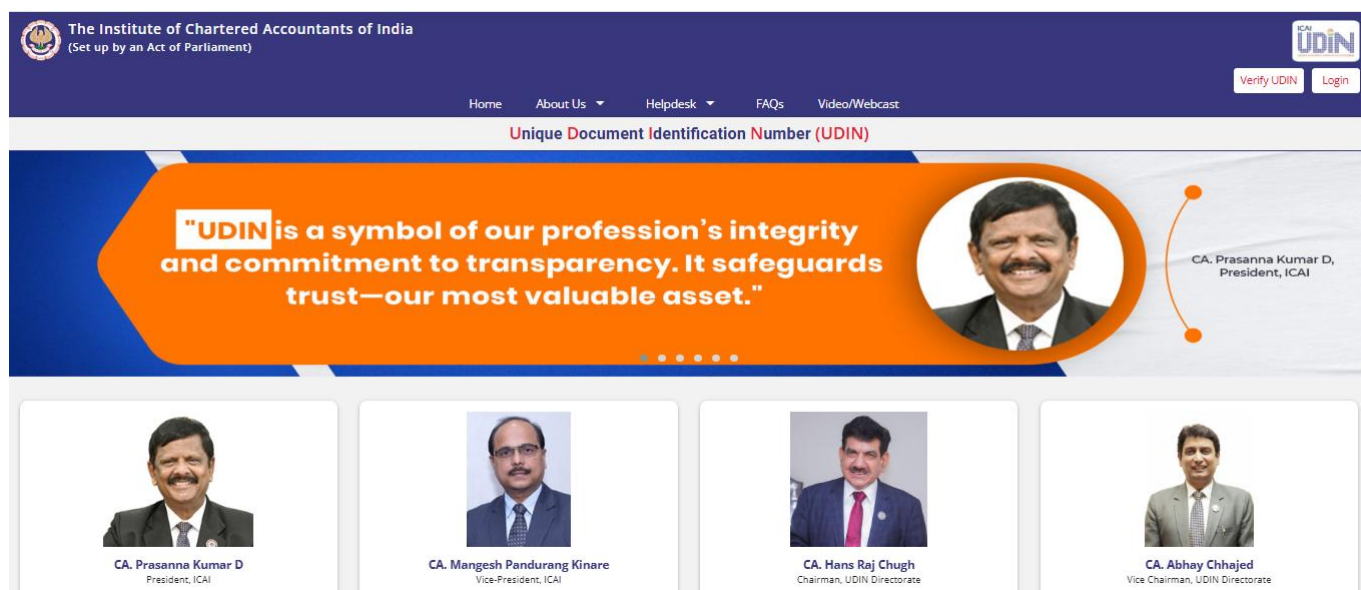
1. URL & UDIN Introduction Manual

The URL for accessing the UDIN Portal shall remain unchanged, i.e., <https://udin.icai.org/>

This manual provides a step-by-step guide to each functionality available on the existing (AS-IS) UDIN Portal. It covers processes such as UDIN generation, revocation of UDIN, list UDIN, and verification of UDIN, as well as other essential features of the portal.

Home Screen Overview

The home screen of the ICAI UDIN portal serves as the central hub for users accessing various resources and features related to the Unique Document Identification Number (UDIN). Users are greeted with an organized interface that highlights essential sections and leadership updates.

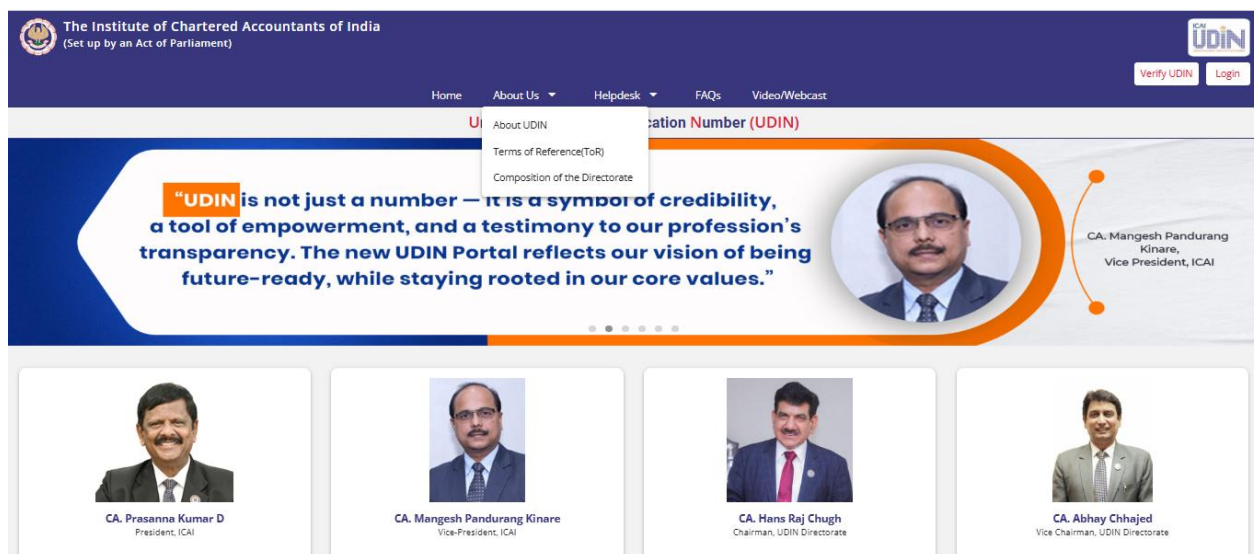


Key Elements:

- **Navigation Bar:** Located at the top, offering quick access to:
 - (i) About Us
 - (ii) Helpdesk
 - (iii) FAQs
 - (iv) Video/Webcast
- **Announcements:** Announcements related to the UDIN Portal are displayed here and can be viewed by clicking on a specific announcement.
- **What's New:** Information regarding upcoming webinars, as and when scheduled, is displayed here. Announcements related to other committees, departments, directorates, or boards are uploaded here and can be viewed by clicking on a specific announcement.
- **UDIN Publications:** Latest edition of the UDIN Report and the FAQs on UDIN are available here.

(i) About Us

The **About Us** tab provides information about the UDIN Directorate and its activities/ToR.



Available Options:

1. About UDIN

It communicates the story of the origin of the UDIN Directorate and provides links to respective pages such as the login page, FAQs, and the grievance module.

2. Terms of Reference (ToR)

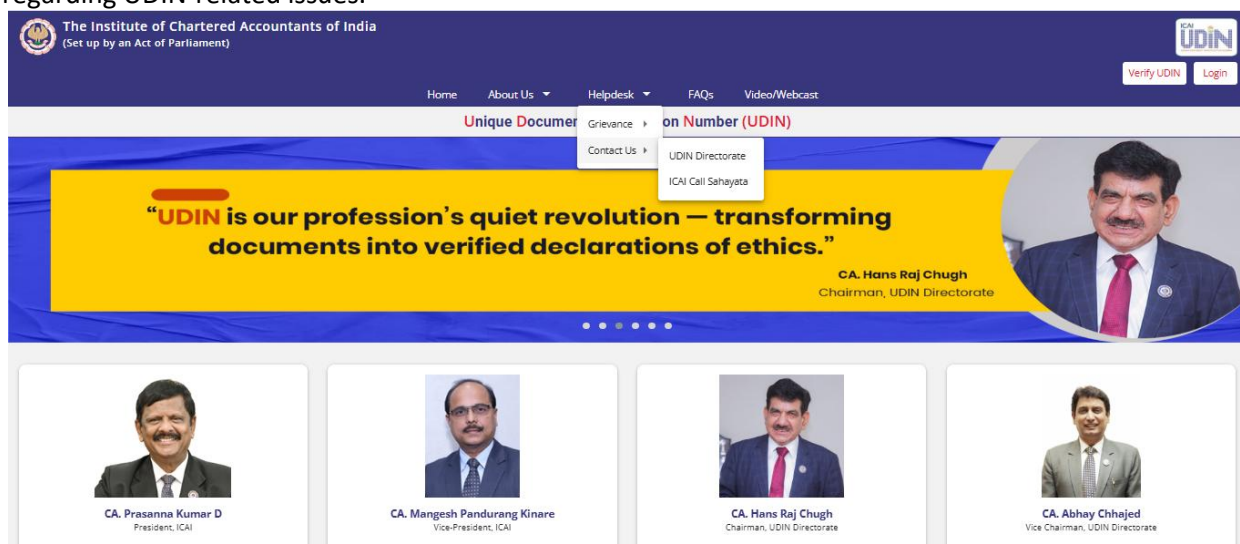
The “ToR” defines the objectives, scope of work, activities, tasks to be performed, and respective responsibilities of the Directorate. It can be viewed by clicking on it.

3. Composition of the Directorate

It Shows the composition of the Directorate for the current year and can be viewed by clicking on it.

(ii) ✖ Helpdesk

The **Helpdesk** tab is provided to assist in raising grievances and enabling direct communication regarding UDIN-related issues.



Available Options:

1. Grievance

- (i) **Raise Grievance:** Enables users to lodge complaints, report any issues encountered with UDIN, or provide suggestions.
- (ii) **Grievance Status:** Allows users to track the status of previously submitted grievances, offering transparency and follow-up clarity.

2. Contact Us

Provides contact details and communication channels to reach the UDIN support team and ICAI Call Sahayata team.

(iii) FAQs

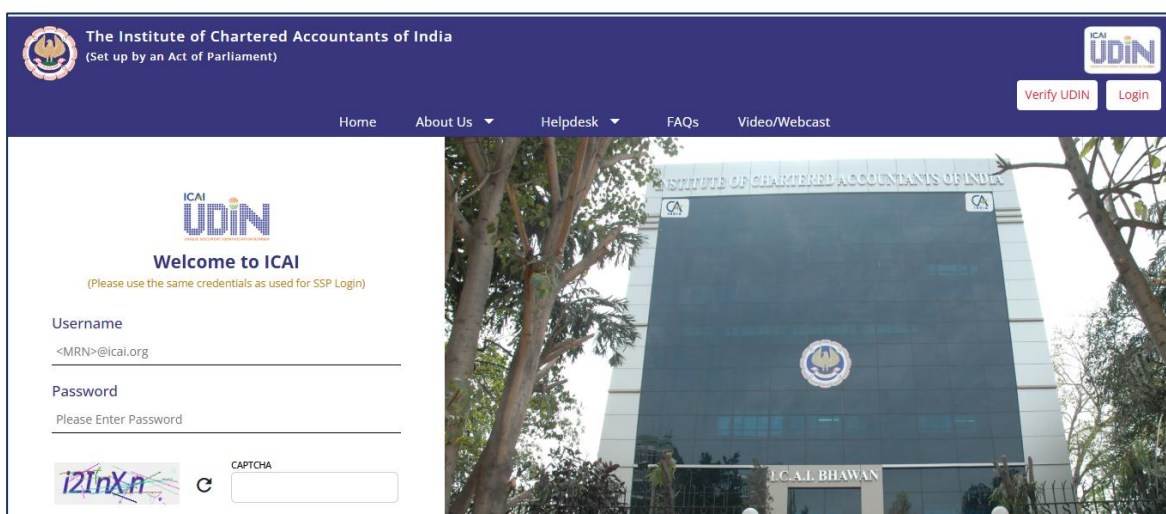
This is a guidance manual for members. If they face any issue or problem, they may refer to the FAQs (Frequently Asked Questions). The 6th Edition of the FAQs is available on the portal at the link <https://udin.icaai.org/assets/images/FAQs%20on%20UDIN.pdf>

(iv) Video/Webcast

From time to time, the Directorate organizes webinars to sensitize members about issues related to UDIN. Members may view the webinars organized by the UDIN Directorate.

2. 🌐 Member Login & Dashboard

The **First-Time Registration** process has been abolished. SSP credentials will be used for login to the UDIN Portal.

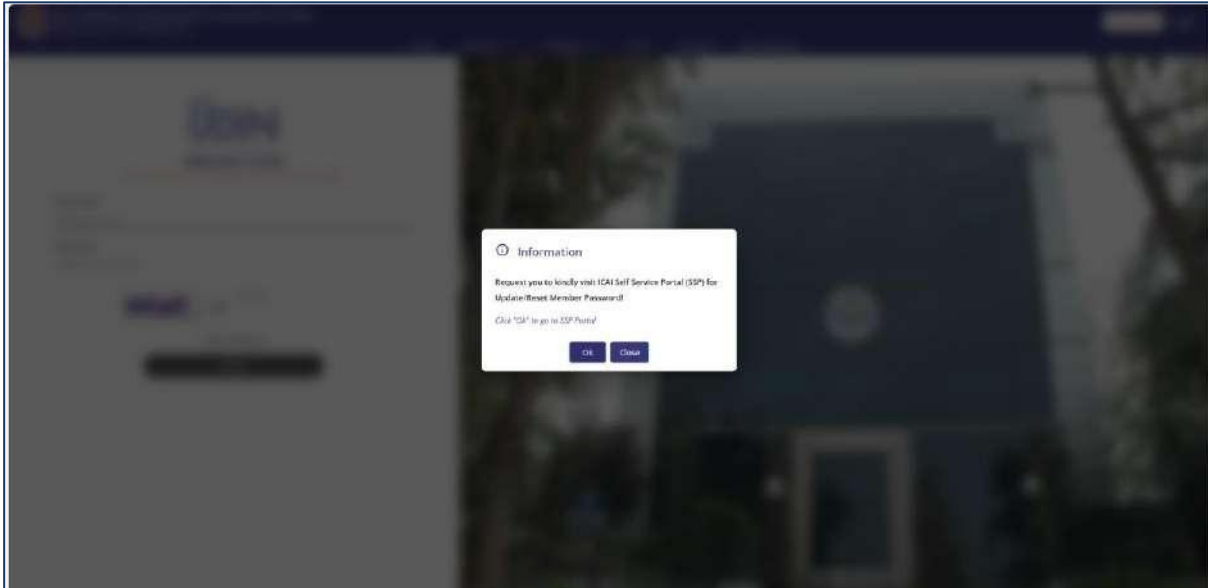


(i) Member Login:

- Enter the **Username** used at SSP Portal to login: MRN@icai.org (*MRN stands for Member Registration Number*).
- Please enter password used to login at SSP Portal.
- Enter CAPTCHA.

a) **F**orgot Password Procedure

The member needs to visit the SSP Portal to reset or update the password, as SSP credentials are used to log in to the UDIN Portal.

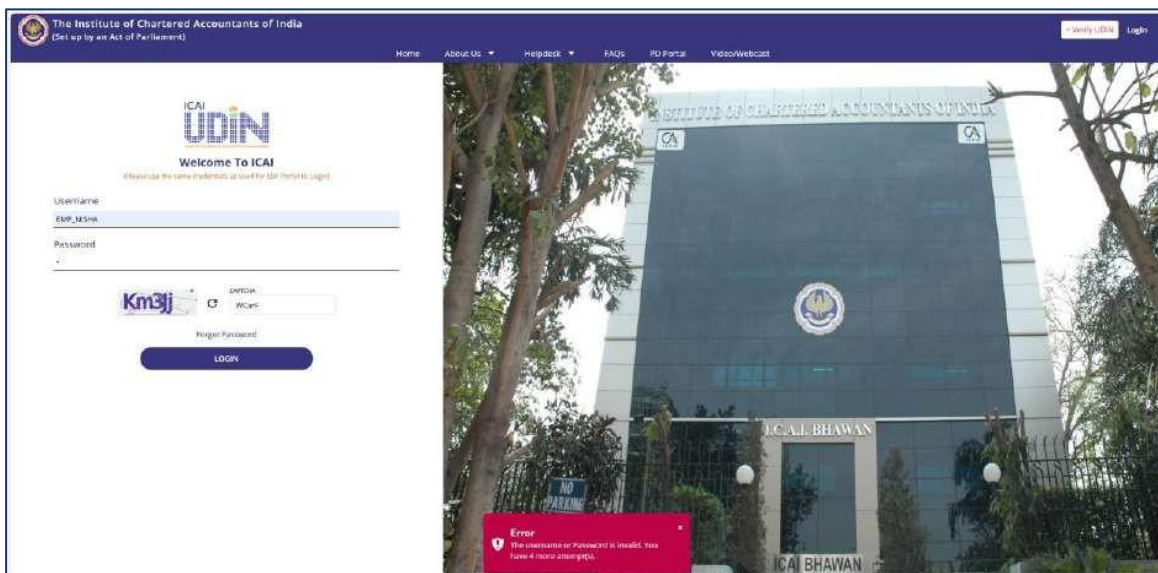


Steps to Follow:

1. Click on **Forgot Password** button.
2. A pop-up message will appear stating:
"Request you to kindly visit ICAI Self Service Portal (SSP) for Update/Reset Member Password!"
3. Click **OK** button, which redirect to the SSP Portal to reset the password.

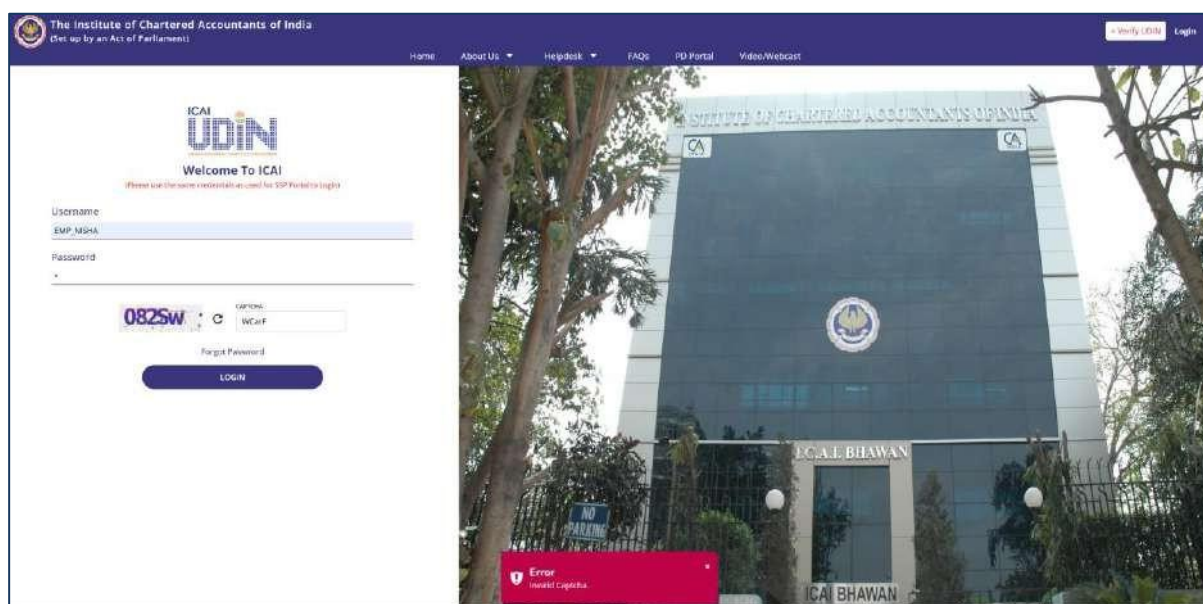
b) **I**nvalid Login Attempt

When member enters incorrect credentials while trying to access the UDIN portal, the system promptly issues a warning to safeguard against unauthorized access.



c) Invalid CAPTCHA Alert

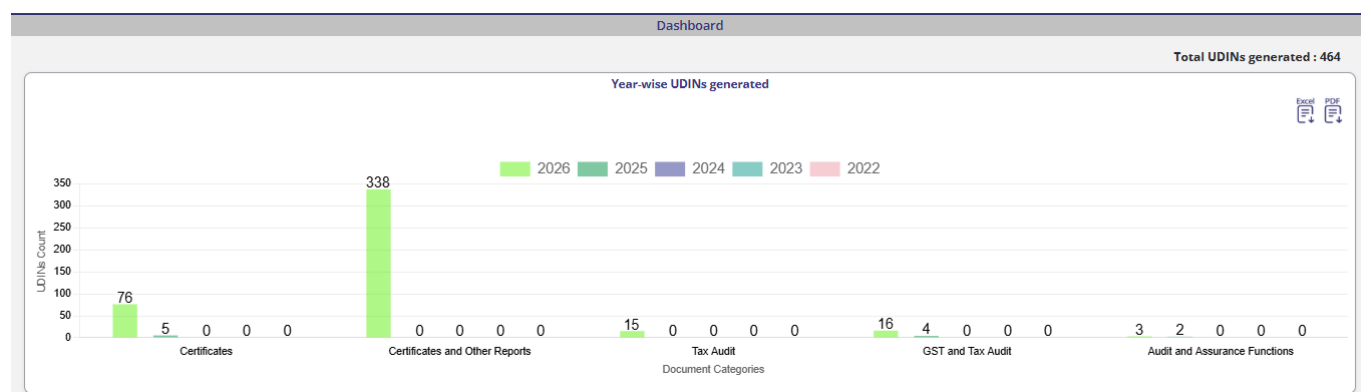
When user enter an incorrect CAPTCHA code during login, the UDIN portal immediately flags the error to prevent unauthorized or automated access.



(ii) Member Dashboard

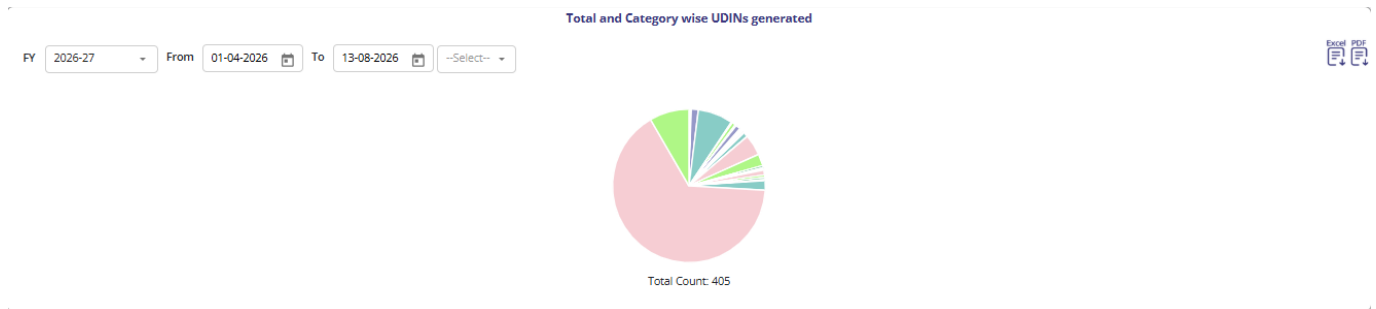
After a successful login, the **Member Dashboard** appears by default, providing visual insights and data summaries related to UDIN.

a) Bar Graph: Presents a year-wise summary of UDINs generated by the member for the past five years.

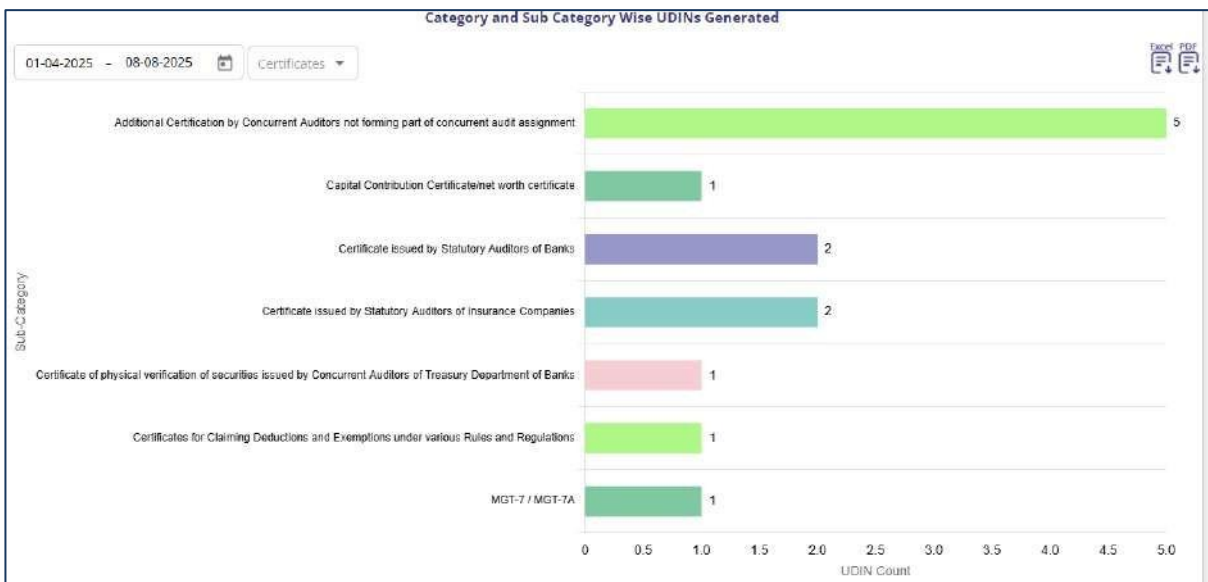


b) Pie Chart: Displays the total and category-wise UDINs generated by the member. By default, it shows UDINs generated during the current calendar year. A Custom Calendar option is available to allow the member to filter the details as per their requirement.

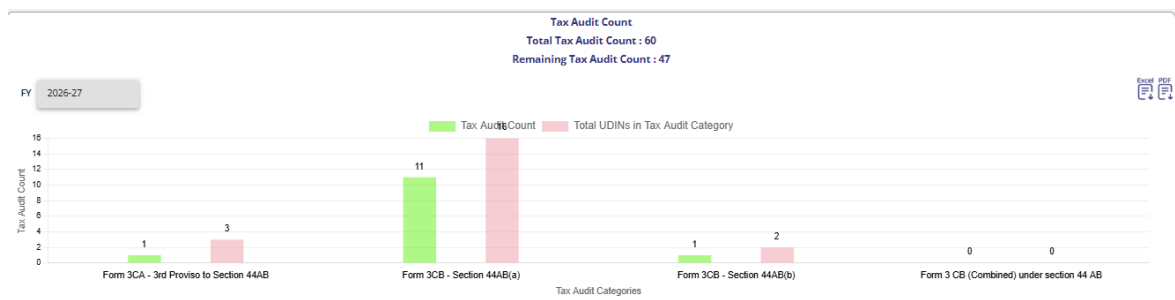
Hovering the cursor over the pie chart displays the date-wise UDINs generated, helping the member identify the day with the maximum UDINs generated. From the dropdown menu, members may select the relevant sub-category as required.



c) Horizontal Bar Chart: Sub-category-wise UDINs within a specific category can be sorted using the Custom Calendar option.



d) Tax Audit Count: This graph depicts the Tax Audit count and remaining count for a selected financial year. Members can also download the Tax Audit Count report in **Excel** or **PDF** format, as required.



3. Generate UDIN

A member may generate UDINs under three main categories. The details appearing in a horizontal layout are pre-filled, directly fetched from the SSP.

The FRN is to be selected from the drop-down on behalf of which the UDIN is being generated. If the member is not carrying out the assignment on behalf of any firm, member can select NA/Not Applicable/Individual Capacity in the place of FRN from the drop down.

Generate UDIN

	Member Name Chitresh Sagar	Membership Registration Number 999995	E-mail chitreshsagar2@gmail.com	PAN of Member HDOPK9129L	Pincode 515106
---	-------------------------------	--	------------------------------------	-----------------------------	-------------------

Your Firm Registration Number (FRN) *

UDINs generated under FRN will be shared with the respective Firm In-charge.

--Select--

In case members are unable to generate UDIN under FRN Category, they may generate UDIN under "Not Applicable/Individual Capacity" Category. Therein the members may put FRN details under "Document Description" field while generating UDIN.

Document Type *

☒ Certificates and Other Reports

☐ Tax Audit

☐ Audit and Assurance Functions

The step-by-step process for generating a UDIN in each category is described below:

(i) Certificates and Other Reports

Under **Certificates and Other Reports**, there are 55 categories in which UDINs can be generated. Two fields are mandatory, and additional dynamic input fields can be added with the required particulars and values.

Document Type *

☒ Certificates and Other Reports

☐ Tax Audit

☐ Audit and Assurance Functions

Type of Certificate *

Additional Certification by Concurrent Auditors not forming part of concurrent audit assignment

Date of Signing of Document * (DD-MM-YYYY)

DD-MM-YYYY

Dynamic Input Fields in line with the Certificate content

Figures/Values to be entered in: *

☐ Numeric

☐ Alphanumeric

☒ Numeric and Alphanumeric

Figures/Values: (Do Not Disclose Client details)

S.No.	Particulars	Figures/Values:	Denomination	Converted Value (For Standardisation)
1 *	Particulars	Figures in INR	--Select--	
2 *	Particulars	Figures in INR	--Select--	
3	Particulars			
4	Particulars			

Add More

Delete Last Row

Others – Certificate Name

In case a member wishes to generate a UDIN for a certificate that is not available in the Sub-Category drop-down list, the member may select “Others” from the Sub-Category list. Upon selecting “Others”, a text field is displayed below the Sub-Category field. The member may enter the name of the certificate in the text field and proceed with the UDIN generation process.

The screenshot shows a web form for generating a UDIN. At the top, there is a field for 'Your Firm Registration Number (FRN) *' with a note: 'UDINs generated under FRN will be shared with the respective Firm In-charge.' Below this is a dropdown menu currently set to 'Not Applicable/Individual Capacity'. A light blue informational box states: 'In case members are unable to generate UDIN under FRN Category, they may generate UDIN under "Not Applicable/Individual Capacity" Category. Therein the members may put FRN details under "Document Description" field while generating UDIN.' Below the box, the 'Document Type *' section has three radio buttons: 'Certificates and Other Reports' (selected), 'Tax Audit', and 'Audit and Assurance Functions'. The 'Type of Certificate *' section features a dropdown menu with 'Others' selected, which is highlighted with a red box. Directly below this dropdown is another text field, also highlighted with a red box, containing the placeholder text 'Please specify the other certificate name'.

- (i) Select Certificates to generate a UDIN under the Certificates category.
- (ii) Select the sub-category from the drop-down list.
- (iii) Select the Date of Signing from the calendar.
- (iv) Fill in all the required parameters and their corresponding values/figures.
- (v) Extra fields can be added using the **Add More** option. By clicking **Delete Row**, the selected row will be removed.

Dynamic Input Fields in line with the Certificate Content

Based on the suggestions received from members, it was decided to incorporate this section into the UDIN Portal; where member can enter the figures/ values as per the given options:

Accordingly, the following logic will be implemented:

1. If the selection is **Numeric**: All mandatory and non-mandatory rows accept only numeric figures/values.
 - A numerical input field will be displayed along with a corresponding denomination field.
 - Upon clicking **Add More**, each newly added row will follow the same structure, i.e., include both the number field and the denomination field.

Document Type * ☒ **Certificates** ☐ GST and Tax Audit ☐ Audit and Assurance Functions

Type of Certificate * Capital Contribution Certificate/net worth certificate x

Date of Signing of Document * (DD-MM-YYYY) DD-MM-YYYY

Dynamic Input Fields in line with the Certificate content

Figures/Values to be entered in: ☒ **Numeric** ☐ Alphanumeric ☐ Numeric and Alphanumeric

Figures: (Do Not Disclose Client details)

S.No.	Particulars	Figures:	Denomination	Converted Value (For Standardisation)
1 *	Testing 1	244232	Hundreds x	2,44,23,200
2 *	Testing 2	232423323	Hundreds x	23,24,23,32,300
3	Testing 3	423525235	Hundreds x	42,35,25,23,500
4	Testing 4	43432523	Millions x	43,432,523,000,000

2. If the selection is **Alphanumeric**: All mandatory and non-mandatory rows accept only alphanumeric figures/values.
- An alphanumeric input field (without denomination) will be shown.
 - Upon clicking **Add More**, each new row will replicate the same format — only the alphanumeric field without any denomination field.

Document Type * ☒ **Certificates** ☐ GST and Tax Audit ☐ Audit and Assurance Functions

Type of Certificate * --Select--

Date of Signing of Document * (DD-MM-YYYY) DD-MM-YYYY

Dynamic Input Fields in line with the Certificate content

Figures/Values to be entered in: ☐ Numeric ☒ **Alphanumeric** ☐ Numeric and Alphanumeric

Figures/Values: (Do Not Disclose Client details)

S.No.	Particulars	Figures/Values:
1 *	Particulars	
2 *	Particulars	
3	Particulars	
4	Particulars	

3. If the selection is **Numeric and Alphanumeric**: The first two mandatory rows accept only numeric values, and non-mandatory rows accept alphanumeric values.
- By default, the form will display the following:
 - **First two mandatory fields** with denomination field for capturing numerical values.
 - **A third field** for entering alphanumeric values, without any denomination field.

Document Type * ☒ Certificates ☐ GST and Tax Audit ☐ Audit and Assurance Functions

Type of Certificate * --Select--

Date of Signing of Document * (DD-MM-YYYY) DD-MM-YYYY

Dynamic Input Fields in line with the Certificate content

Figures/Values to be entered in: ☐ Numeric ☐ Alphanumeric ☒ Numeric and Alphanumeric

Figures/Values: (Do Not Disclose Client details)

S.No.	Particulars	Figures/Values:	Denomination	Converted Value (For Standardisation)
1 *	Testing 1	12345	Hundreds	12,34,500
2 *	Testing 2	12345	Thousands	1,23,45,000
3	Testing 3	abcdef		
4	Testing 4	ghijk		

- (vi) Under **Document Description**, enter text between 5 to 250 characters from some portions of the report. This field is mandatory. The remaining word count will be displayed to assist in entering the text. Special characters are not allowed except for a few such as full stop (.), comma (,), underscore (_), hyphen (-), and dash (–) are allowed.

Figures/Values: (Do Not Disclose Client details)

S.No.	Particulars	Figures/Values:	Denomination	Converted Value (For Standardisation)
1 *	Testing 1	12345	Hundreds	12,34,500
2 *	Testing 2	12345	Thousands	1,23,45,000
3	Testing 3	abcdef		
4	Testing 4	ghijk		

Add More Delete Last Row

Document Description * UDIN Instruction manual
23 / 250 Characters

Remarks For Internal reference notes
28 / 250 Characters

Save Draft Send OTP

- (vii) The **Remarks** field is optional and is meant for the member's internal reference. The remaining character count will be displayed to assist in entering the text.
- (viii) By clicking on **Save Draft**, the member can either save the document or proceed by clicking on **Send OTP**.

The screenshot shows a form with three main sections: 'Document Description', 'Remarks', and 'Enter OTP'. The 'Document Description' field contains 'UDIN Instruction Manual' and shows '23 / 250 Characters'. The 'Remarks' field contains 'For internal reference of member.' and shows '33 / 250 Characters'. The 'Enter OTP' section has an input field and a blue 'Verify OTP' button highlighted with a red box. Below the input field, there is a red message 'Please Wait 58s Before Resending OTP.', a grey 'Resend OTP' button, and a blue link 'Remaining Attempts: 4'.

- (ix) After validating the OTP, two options will appear on the screen:
- **Preview** – to view the filled details.
 - **Save Draft** – to save the details.

The screenshot shows the same form as before, but now with two buttons at the bottom: a blue 'Preview' button highlighted with a red box and a blue 'Save Draft' button. The 'Document Description' and 'Remarks' fields remain the same.

- (x) On clicking **Preview**, the filled details will be displayed on the screen to ensure that the information entered is correct. The same dynamic fields used for entering inputs will appear pre-selected as during the initial filling of the detail.

Document Type :	Certificates
Type Of Certificate :	Certificate issued by Statutory Auditors of Banks
Date of Signing of Document (DD-MM-YYYY) :	14-06-2025
Does the certificate contain financial figures in INR?	Yes

Figures/Values (Do Not Disclose Client Details)				
S.No.	Particulars	Figures	Denomination	Converted Value (For Standardisation)
1 st	Testing 1	123456.78	Actual	1,23,456.78
2 nd	Testing 2	123456.78	Hundreds	1,23,45,678
3	Testing 3	123456.78	Thousands	12,34,56,780
4	Testing 4	123456.78	Lakhs	12,34,56,78,000

Document Description :	UDIN Instruction Manual
Remarks :	For internal reference of member.

(Internal Reference Notes/Remarks. These Will Not be Shown To Authority)

(xi) If there is any change/error in the content, click **"Edit/Back"** button, or else, click **"Submit"**.

(xii) By clicking **Submit**, an 18-digit UDIN will be generated.

 **Success**
 UDIN : 25343434ILXHJL2338 Generated Successfully
 Click [here](#) to see the details

(xiii) By clicking **here**, the details visible to the verifier will be displayed along with a QR code and Print option.

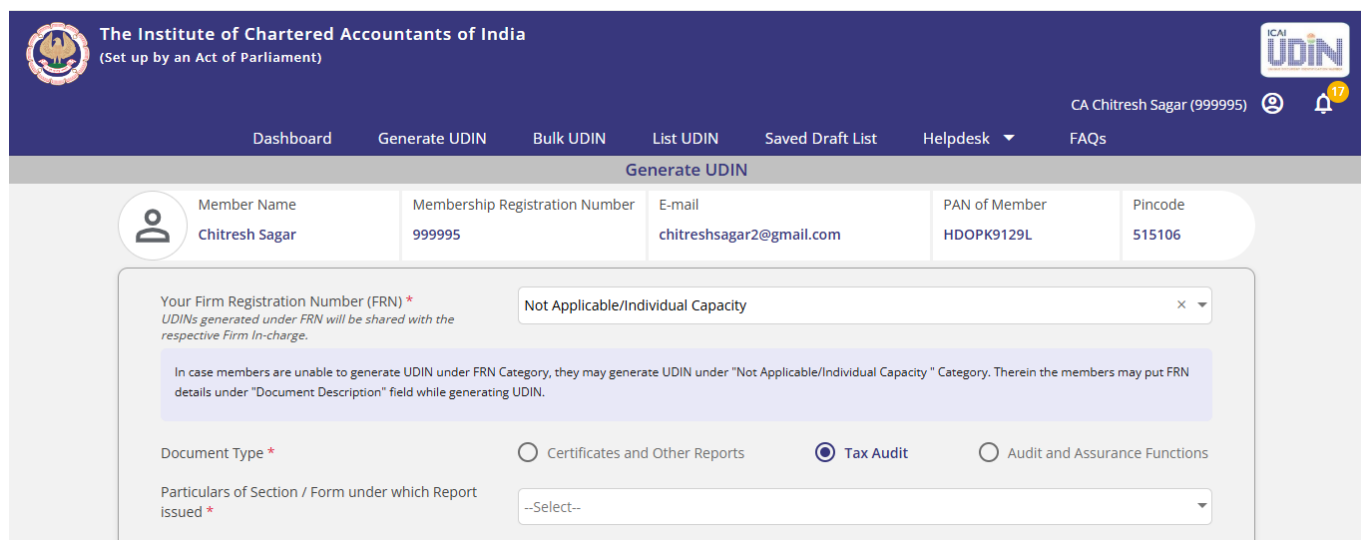
UDIN:	25999995WTUNSR1724
MRN/Name:	999995 / Chitresh Sagar
Firm Registration No.:	Not Applicable/Individual Capacity
Document Type:	Certificates
Type of certificate:	Certificates in form 15CB
Date of Signing of Document:	10-12-2025
Created Date/Time:	11-12-2025 12:04:22
Status:	Active
Particulars: Figures/Values:	
Particulars	Figures/Values
1. Testing 15	1236
2. Testing 15	1236
Document Description:	Testing Purpose



(xiv) To generate another UDIN, click **Back to UDIN Generation**. Click **List UDIN** to go to the List UDIN page.

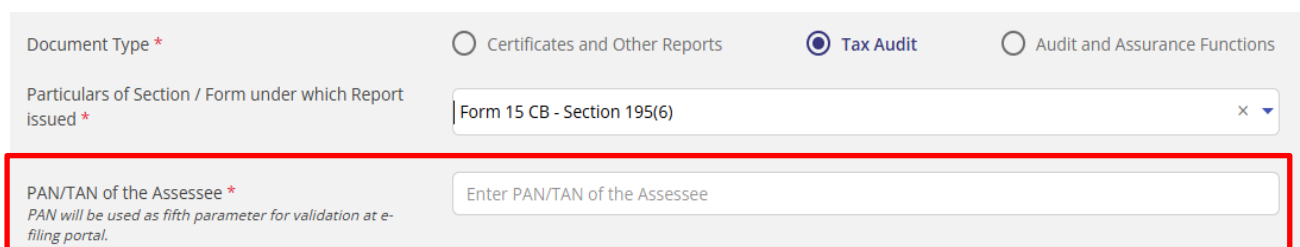
(ii) Tax Audit

The process to generate a UDIN under the Tax Audit category remains the same. the fields having red asterisk (*) are mandatory, remaining fields are optional. Dynamic fields can be added with particulars and values by clicking on **Add More** button. However, a few additional functionalities have been introduced under this category, as briefly explained below:



a) Capturing PAN of the assessee/auditee

As per the Council decision the PAN of the assessee/auditee has been introduced as an additional (fifth) parameter for UDIN validation at the e-Filing Portal, in addition to the existing parameters, namely MRN, UDIN, Assessment Year/Financial Year, and Form ID. The PAN field is mandatory and has been incorporated solely for validation purposes at the e-Filing Portal. Members are advised to ensure that the UDIN generated is mapped to the same PAN as used at the e-Filing Portal. It is clarified that the PAN entered for validation shall not be visible to the verifier.



b) Auditor's Opinion on Financial Statements

Auditor's Opinion on financial statements is a compulsory field. This functionality has been introduced under two categories: **GST & Tax Audit** and the **Audit & Assurance Functions**. The details captured in this functionality will not be visible to the verifier.

The portal displays the question: “**Is Auditor's Opinion on financial statements applicable to this audit?**” Two options are available: Yes / No.

Document Type *

☐ Certificates ☒ GST and Tax Audit ☐ Audit and Assurance Functions

Particulars of Section / Form under which Report issued * Form 10 CCB - Section 80-I (7) x

Assessment Year * --Select--

PAN/TAN of the Assessee *
PAN/TAN will be used as fifth parameter for validation at e-filing portal. Enter PAN/TAN of the Assessee

Date of Signing of Document * (DD-MM-YYYY) DD-MM-YYYY

Auditor's Opinion on Financial Statements

Is Auditor's Opinion is applicable to this audit report? *

--Select--
Yes
No

Details of Preceding year's of Audit

- **If “Yes”:**

Select **any one type of opinion** from the dropdown (Unmodified, Qualified, Adverse, or Disclaimer) and further proceed in the section.

Auditor's Opinion on Financial Statements

Is Auditor's Opinion is applicable to this audit report? * Yes

Auditor's Opinion *

Key Audit Matter (KAM)*

Emphasis of Matter (EOM)*

Other Matter*

Material Uncertainty related to Going Concern*

Entity Type* --Select--

Unmodified Opinion
Qualified Report
Adverse Opinion
Disclaimer of Opinion

Auditor's Opinion on Financial Statements

Is Auditor's Opinion applicable to this audit report? * Yes

Auditor's Opinion * Qualified Report

Key Audit Matter (KAM)* ☒ Yes ☐ No

Emphasis of Matter (EOM)* ☐ Yes ☒ No

Other Matter* ☒ Yes ☐ No

Material Uncertainty related to Going Concern* ☐ Yes ☒ No

Entity Type* Non-Listed Entity

Type of Non-Listed Entity* Sole Proprietorship

Details of Preceding year's of A

Is capturing details of the preceding this audit/form? *

Figures/Values:

• If “No”:

No details relating to the Auditor’s Opinion on Financial Statements are required to be entered, and the member may proceed further.

Auditor's Opinion on Financial Statements

Is Auditor's Opinion applicable to this audit report? * No

c) Preceding Year's Audit Details

The Council, at its 442nd meeting, decided to enable a provision for capturing details by the succeeding auditor during UDIN generation on the UDIN portal. This functionality has been introduced under two categories: **GST & Tax Audit** and the **Audit & Assurance Functions**. The details captured in this functionality will not be visible to the verifier.

The system configuration is provided below:

The portal displays the question: “Is capturing details of the preceding auditor applicable to this audit/form?”: Yes / No.

Details of Preceding year's of Audit

Is capturing details of the preceding auditor applicable to this audit/form? *

Yes

Have you issued the audit report to the client previous/last year? *

--Select--

Yes

Audit done by partner in the same firm

No

First Year of Audit

Figures/Values:

S.No.	Particulars ⓘ
1 *	

- If **"Yes"** is selected from the drop-down:
 - Following question **"Have you issued the audit report to the client previous/last year?"** will enable with the dropdown options of Yes/ Audit done by partner in the same firm / No/ First Year of Audit
 - If **Yes** is selected from the dropdown:
 - Enter the UDIN of the audit report generated for the previous year.

Details of Preceding year's of Audit

Is capturing details of the preceding auditor applicable to this audit/form? *

Yes

Have you issued the audit report to the client previous/last year? *

Yes

Enter the UDIN of the audit report generated for the previous year *

UDIN

- If **Audit done by partner in the same firm**: Enter the Member Registration Number (MRN) of the partner.
- If **No** is selected from the drop-down:
 - Enter the MRN (Member Registration Number) of the previous auditor.
 - Select **Yes/No** from the radio button to indicate whether communication has been made to the previous auditor regarding the appointment.
 - If **Yes**: Select the Date of Communication from the calendar.
 - If **No**: Proceed further.
 - Select one option from the drop-down (Yes / No / Not Known) regarding the outstanding fees.

Details of Preceding year's of Audit	
Is capturing details of the preceding auditor applicable to this audit/form? *	Yes
Have you issued the audit report to the client previous/last year? *	No
Enter MRN of the previous Auditor *	MRN
Have you communicated previous auditor for your appointment? *	☐ Yes ☐ No
Is there any outstanding audit fee related to the previous year's audit as per the financial statements audited by you? *	--Select-- Yes No Not Known
Figures/Values:	
S.No.	Particulars ⓘ

- If **First Year of Audit** is selected from the drop-down:
 - May proceed further.

Details of Preceding year's of Audit				
Is capturing details of the preceding auditor applicable to this audit/form? *	Yes			
Have you issued the tax audit report to the client previous/last year? *	First Year of Audit			
Figures/Values:				
S.No.	Particulars ⓘ	Figures/Values:	Denomination	Converted Value (For Standardisation)
1 *	Assessment Year	--Select--		

- If “No” is selected from the drop-down member may proceed further.

Details of Preceding year's of Audit	
Is capturing details of the preceding auditor applicable to this audit/form? *	No

Please note: This functionality has been introduced under two categories: **Tax Audit** and the **Audit & Assurance Functions**. The details captured in this functionality is for statistical purpose only and will not be visible to the verifier.

Field-Level Validation for all sub-categories under section 44AB [Clauses (a) to (e)] at the time of UDIN generation under 'Tax Audit' category

The Council, at its 442nd meeting held on 26th–27th May 2025, has decided to implement a ceiling on the maximum number of UDINs that can be generated, in accordance with the prescribed limit of 60 Tax Audits with effect from 1st April 2026. In this regard, the ceiling shall be applicable for the following sub- categories:

1. Form 3CA - 3rd proviso to section 44AB
2. Form 3CB - Section 44AB(a)
3. Form 3CB - Section 44AB(b)
4. Form 3CB (Combined) under section 44AB

Accordingly, the ceiling on UDIN generation at UDIN Portal will come into effect from the same date, in alignment with the Council decision i.e. from 1st April 2026. However, the **Field Level Validation** has been implemented at UDIN portal, as the same configuration will continue to be applicable beyond 1st April 2026 across all subcategories under Section 44AB [clauses (a) to (e)] at the time of UDIN generation under 'GST and Tax Audit' category.

Field-Level Validation

S.No.	Section	Preliminary Questions (if any)	Validation Logic / Criteria
1	44AB(a)	Q: Are cash transactions ≤ 5%? (Yes/No)	- If Yes → Turnover > Rs. 10 Cr - If No → Turnover > Rs. 1 Cr
2	44AB(b)	None	- Gross receipts > Rs. 50 lakh
3	44AB(c)	Is the income claimed lower than the deemed profits and gains under section 44AE/44BB/44BBB? →Yes/No	Proceed only if answer to Q = Yes
4	44AB(d)	Q(i) Is Total Gross Receipts ≤Rs.50 lakhs →Yes/No Q(ii) Is Total Gross Receipts > Rs.50 lakhs but ≤ Rs.75 lakhs and total cash receipts ≤ 5% of total gross receipts? → Yes/No Q(iii) Is the income claimed lower than the deemed profits and gains under section 44ADA? →Yes/No Q(iv) Is Total Income > Basic Exemption Limit →Yes/No	Proceed only if – Answer to either Q(i) or Q(ii) = Yes; AND Answer to both Q(iii) and Q(iv) = Yes;
5	44AB(e)	Q(i) Is section 44AD(4) applicable? →Yes/No Q(ii) Is Total Income > Basic Exemption Limit →Yes/No	Proceed only if answer to both Q(i) and Q(ii) = Yes

UDIN Generation for Tax Audit

1. Members need to select Date of Signing of Document first and then select the Tax Audit Form.

In case members are unable to generate UDIN under FRN Category, they may generate UDIN under "Not Applicable/Individual Capacity " Category. Therein the members may put FRN details under "Document Description" field while generating UDIN.

Document Type *

☐ Certificates and Other Reports ☒ Tax Audit ☐ Audit and Assurance Functions

Particulars of Section / Form under which Report issued *

PAN of the Assessee *

PAN will be used as fifth parameter for validation at e-filing portal.

Date of Signing of Document * (DD-MM-YYYY) ⓘ

Auditor's Opinion on Financial Statements

44ab

- Form 3CA - 3rd Proviso to Section 44AB
- Form 3CB - Section 44AB(a)
- Form 3CB - Section 44AB(b)
- Form 3CB - Section 44AB(c)
- Form 3CB - Section 44AB(d)
- Form 3CB - Section 44AB(e)

2. Upon selecting the applicable Tax Audit Form, a pop-up window is displayed showing the member's current Tax Audit Count under the applicable category/categories, along with the remaining count, wherever applicable. Ceiling on Tax Audit assignments has been implemented in accordance with the Chartered Accountants (Limit on Number of Tax Audits) Guidelines, 2025, as notified in the Gazette of India by the Institute.

Category	Tax Audit Count	UDIN Generation Count
Total Permissible Limit	60	-
Form 3CA 3rd proviso to section 44AB	1	3
Form 3CB Section 44AB(a)	11	16
Form 3CB Section 44AB(b)	1	2
Form 3CB (Combined) under section 44AB	0	0
Remaining Tax Audit Count	47	-

Close

3. After selecting the relevant **Category**, the member is required to select whether the UDIN is being generated for the **Original Form** or **Revised Form**, as applicable.

Document Type * ☐ Certificates and Other Reports ☒ Tax Audit ☐ Audit and Assurance Functions

Particulars of Section / Form under which Report issued * Form 3CB - Section 44AB(a) x

UDIN Generated For* --Select--

Nature of Tax Audit Assignment * Original form/ report

Assessment Year * Revise form/ report

PAN of the Assessee * Enter PAN of the Assessee

Date of Signing of Document * (DD-MM-YYYY) 05-08-2026

4. Nature of Tax Assignment to be chosen: Member may select the nature of Tax Audit Assignment.

In case members are unable to generate UDIN under FRN Category, they may generate UDIN under "Not Applicable/Individual Capacity" Category. Therein the members may put FRN details under "Document Description" field while generating UDIN.

Document Type * ☐ Certificates and Other Reports ☒ Tax Audit ☐ Audit and Assurance Functions

Particulars of Section / Form under which Report issued * Form 3CB - Section 44AB(a) x

UDIN Generated For* Original form/ report

Nature of Tax Audit Assignment * ☐ Assessee ☒ Head Office of assessee ☐ Branch of assessee

 In case the member selects **"Revised Form/Report"**, a question is displayed:

"Have you generated the UDIN for the original Tax Audit Report/Form?"

The member is required to select the appropriate response. This option is applicable where the member is generating a UDIN for a **revised Tax Audit Form/Report** that was previously audited by him or by another partner/member.

- **If "Yes" is selected:** The member is required to enter the **previously generated UDIN** for the original Tax Audit Report/Form and proceed further.
- **If "No" is selected:** The member is required to enter the **MRN of the other partner/member** who had audited the original Tax Audit Report/Form and proceed further.

In case members are unable to generate UDIN under FRN Category, they may generate UDIN under "Not Applicable/Individual Capacity " Category. Therein the members may put FRN details under "Document Description" field while generating UDIN.

Document Type * ☐ Certificates and Other Reports ☒ Tax Audit ☐ Audit and Assurance Functions

Particulars of Section / Form under which Report issued *

UDIN Generated For*

Have you generated the UDIN for the original Tax Audit Report/Form? *

Please enter immediate previous UDIN*

(iii) H Audit & Assurance Functions

The process to generate UDIN under the Audit & Assurance Functions category remains the same. The member has to select the **Type of Audit** and **Act/Law/Statutes/Regulation** from the dropdown. Fields marked with a red asterisk (*) are mandatory, while the remaining fields are optional. Dynamic fields can be added with relevant particulars and values by clicking on **Add More** button.

Dashboard Generate UDIN Bulk UDIN List UDIN Saved Draft List Helpdesk FAQs

Generate UDIN

Member Name Chitresh Sagar Membership Registration Number 999995 E-mail chitreshsagar2@gmail.com PAN of Member HDOPK9129L Pincode 515106

Your Firm Registration Number (FRN) *
UDINs generated under FRN will be shared with the respective Firm In-charge.

In case members are unable to generate UDIN under FRN Category, they may generate UDIN under "Not Applicable/Individual Capacity " Category. Therein the members may put FRN details under "Document Description" field while generating UDIN.

Document Type * ☐ Certificates and Other Reports ☐ Tax Audit ☒ Audit and Assurance Functions

Type of Audit *

Under Act/Law/Statute/Regulation *

Date of Signing of Document * (DD-MM-YYYY)

The following additional details are to be entered during UDIN generation under Audit & Assurance Functions category:

a) Preceding Year's Audit Details

Explained under the Tax Audit section; please refer to page no. 16.

b) Memorandum of Changes (MoC)

Members are required to fill the value of the MOC while generating UDIN for the Audit Report for Statutory Audit of Bank Branch under the category Audit & Assurance Functions for Statutory Bank

Audit-Branch at the UDIN portal without any disclosure of the details of the client.

The information to be provided at the UDIN portal regarding MOC will be mandatory and will be totally encrypted. It will not be visible to any third-party verifier.

Member may select **Yes/No** from dropdown to proceed accordingly:

MOC Details	
Whether Any MOC Submitted? *	--Select--
	Yes
	No

(i) If **No** is selected, the member may proceed further.

(ii) If **Yes** is selected, the following details are to be entered by the member:

Memorandum Of Changes (summary) Fill The Related Figures			
In Respect of	Number of Items	Increase (Rs)	Decrease (Rs)
(a) Income *			
(b) Expenditure *			
(c) Assets *			
(d) Liabilities *			
(e) Gross NPAs *			
(f) Provision on NPAs *			

Please note: The MOC boxes are mandatorily to be filled at least with 0. The boxes accept numbers up to 9,999 in the Number column and up to 99,999,99,999 in the Increase and Decrease columns. Only numbers are accepted in the boxes. Negative Figures are not accepted in any of the boxes.

4. Bulk UDIN Generation

The **Bulk UDIN** feature enables ICAI members to generate multiple UDINs simultaneously (limited to 300 at one time), streamlining the documentation process for high-volume UDIN generation.

Bulk UDIN

	Member Name Chitresh Sagar	Membership Registration Number 343434	E-mail chitreshsagar2@gmail.com	PAN Of Member HDOPK9129L	Pincode 655106
--	--------------------------------------	---	---	------------------------------------	--------------------------

Your Firm Registration Number (FRN) *
UDINs generated under FRN will be shared with the respective Firm In-charge.

--Select--

Document Type *

☒ **Certificates and Other Reports**

☐ Tax Audit

☐ Audit and Assurance Functions

Figures/Values: (Do Not Disclose Client Details)
Kindly only use the template file provided.

Note: Only Values are allowed and not formulas.

[Download Template](#)
[Upload File](#)

S.No	Type of Certificate*	Date of Signing of Document*	Particulars 1*	Figures 1
1	x	📅	Particulars	Figures
2	x	📅	Particulars	Figures
3	x	📅	Particulars	Figures

Add Row

Bulk UDIN Generation for Certificates and Other Reports

The Bulk UDIN Generation functionality enables members to generate multiple UDINs simultaneously under the Certificates and Other Reports category.

Steps for Bulk UDIN Generation

1. Select the required FRN to proceed with the bulk UDIN generation process.
2. Select the relevant Certificate and Other Reports category for which the bulk UDINs are to be generated.
3. After selecting the category, download the corresponding Bulk UDIN Upload Template.
4. Enter the required details in the downloaded template and upload the duly filled template on the portal.
5. Upon successful upload, the details entered in the template are displayed on the screen under the corresponding fields for review.
6. In case of any invalid data or errors, the system displays an appropriate error message against the relevant data.
7. Members may add additional rows directly on the User Interface by clicking on “Add More”. However, the total number of UDINs to be generated in a single instance must not exceed 300 UDINs.
8. Members may also edit or amend the invalid data directly on the User Interface before proceeding with the UDIN generation process.

Bulk UDIN Generation for Tax Audit and Audit and Assurance Functions

The Bulk UDIN Generation functionality enables members to generate multiple UDINs simultaneously under the Tax Audit and Audit & Assurance Functions categories.

Steps for Bulk UDIN Generation

1. Select the relevant Category for which the bulk UDINs are to be generated.
2. Click on the “Add Row” button.
3. A form for generating the UDIN under the selected category is displayed.
4. Enter the required details in the form in the same manner as applicable for single UDIN generation.
5. After completing the form, click on the “Add Row” button available at the bottom of the page to add another UDIN.
6. Repeat the process to add additional forms, as required. A member can add and generate up to 10 UDINs in a single instance.
7. The added forms are displayed in a list on the screen. Members may edit or delete any form from the list, as required.
8. After entering and verifying the details of all the forms, click on “Send OTP”.
9. Enter the OTP received on the registered mobile number/email ID, as applicable, to complete the submission process.
10. Upon successful OTP verification, the UDINs for the submitted forms are generated.

Your Firm Registration Number (FRN) *
UDINs generated under FRN will be shared with the respective Firm In-charge.

Document Type *
☐ Certificates and Other Reports ☒ Tax Audit ☐ Audit and Assurance Functions

Not Applicable/Individual Capacity

+ Add Row

S.No.	Particulars of Section / Form under which Report issued	UDIN Generated For	Have you generated the UDIN for the original Tax Audit Report/Form?	MRN of the Previous Auditor	Please enter OTP
No Data Found.					

Save Draft Send OTP

Generate UDIN

	Member Name Chitresh Sagar	Membership Registration Number 343434	E-mail chitreshsagar2@gmail.com	PAN of Member HDOPK9129L	Pincode 655106
---	-------------------------------	--	------------------------------------	-----------------------------	-------------------

Your Firm Registration Number (FRN) *
UDINs generated under FRN will be shared with the respective Firm In-charge.

Not Applicable/Individual Capacity

In case members are unable to generate UDIN under FRN Category, they may generate UDIN under "Not Applicable/Individual Capacity" Category. Therein the members may put FRN details under "Document Description" field while generating UDIN.

Document Type *

☐ Certificates and Other Reports
☒ Tax Audit
☐ Audit and Assurance Functions

Particulars of Section / Form under which Report issued *

--Select--

PAN of the Assessee *

PAN will be used as fifth parameter for validation at e-filing portal.

Enter PAN of the Assessee

Date of Signing of Document * (DD-MM-YYYY) ⓘ

DD-MM-YYYY 

Auditor's Opinion on Financial Statements

Is Auditor's Opinion applicable to this audit report? *

--Select--

Auditor's Opinion on Financial Statements

Is Auditor's Opinion applicable to this audit report? *

--Select--

Figures/Values:

S.No.	Particulars ⓘ	Figures/Values:
Add More		

Document Description * ⓘ

Details of the document for which the UDIN is being generated are to be filled in 5 to 250 characters only

0 / 250 Characters

Remarks ⓘ

This information will not be shown to Authority.

0 / 250 Characters

Add Row

Your Firm Registration Number (FRN) *
UDINs generated under FRN will be shared with the respective Firm In-charge.

Document Type *

Not Applicable/Individual Capacity

☐ Certificates and Other Reports ☒ Tax Audit ☐ Audit and Assurance Functions

Auditor's Opinion on Financial Statements	Details of Preceding year's of Audit	Particulars/Figures	Document Description	Remarks	Actions
View Details	View Details	View Details	fskfjsf	-	
View Details	View Details	View Details	Tetsing	-	
View Details	View Details	View Details	Testing 3	-	

Total Rows: 3

[Save Draft](#) [Send OTP](#)

Your Firm Registration Number (FRN) *
UDINs generated under FRN will be shared with the respective Firm In-charge.

Document Type *

Not Applicable/Individual Capacity

☐ Certificates and Other Reports ☒ Tax Audit ☐ Audit and Assurance Functions

Auditor's Opinion on Financial Statements	Details of Preceding year's of Audit	Particulars/Figures	Document Description	Remarks	Actions
View Details	View Details	View Details	fskfjsf	-	
View Details	View Details	View Details	Tetsing	-	
View Details	View Details	View Details	Testing 3	-	

Total Rows: 3

[Save Draft](#) [Submit](#)

5. List UDIN

This module enables members to view, filter, and manage previously generated UDINs with precision.

List UDIN

Filter your results

UDIN	Document Generation Year 2026	FRN --Select--
Document Type --Select--	Document Sub-Type --Select--	Remarks/Document Description
Status --Select--	Date of Signing of Document DD/MM/YYYY	From DD/MM/YYYY To DD/MM/YYYY
Auditor's Opinion --Select--	Previous years's of Audit --Select--	PAN

[Search](#) [Reset](#)

(i) **Filter:** User can apply filter on the list of UDIN in following categories:

- a) UDIN
- b) Document Generation Year
- c) FRN
- d) Document Type
- e) Document Sub Type
- f) Remarks/Description
- g) Document status
- h) Date of Signing
- i) Generated Date
- j) Auditor's Opinion (Yes/ No)
- k) Previous year's of Audit (Yes/ No)
- l) PAN

(ii) Search

This section allows the user to search by entering any alphanumeric value, the list displayed is from all the values that match the entered text.

Steps to filter/search UDIN(s)

- (i) The UDINs generated by the user are displayed in order of date created.
- (ii) The member can apply the filter on all field types and sort them.
- (iii) The member can download all the UDINs in CSV and PDF format.
- (iv) The member can search for any text from the search bar.

Details when accessed through Hyperlink:

- (i) Member can see the details of generated UDIN by clicking on the hyperlink of UDIN.
- (ii) Member can access the QR code which takes them to UDIN verification page.

List UDIN										
Filter your results										
Search										
S.No.	UDIN	☐	MRN	Firm	Document Type	Document Sub-Type	Document Description	Date of Signing of Document	AY/FY	Created
1	25999995GNNLKX8714	☐	999995	Not Applicable/Individual Capacity	GST and Tax Audit	Form 10 CCB - Sectio ...more	aaaaaaaa ...more	01-12-2025	2025-2026	12-12-20
2	25999995UBJHGJ6480	☐	999995	Not Applicable/Individual Capacity	GST and Tax Audit	Form 10 CCB - Sectio ...more	sssss	01-12-2025	2025-2026	11-12-20

UDIN Details

UDIN	25999995GNNLKX8714
MRN/Name	999995 / Chitresh Sagar
Firm Registration No.	Not Applicable/Individual Capacity
Document Type	GST and Tax Audit
Particulars of Section / Form under which Report issued	Form 10 CCB - Section 80-IA (7)
Date of Signing of Document	01-12-2025
AY/FY	2025-2026
PAN/TAN of the Assessee	AAAA12345A
Created Date/Time	12-12-2025 10:04:46
Status	Active
Auditor's Opinion on Financial Statements	
Is the auditor's opinion applicable to this audit report?	No
Details of Preceding year's of Audit	
Is capturing details of the preceding auditor applicable to this audit/form?	No

Particulars : Figures/Values

Particulars	Figures	Denomination	Converted Value
1 . Assessment Year	2025-2026		
2 . Testing 1	446511	Hundreds	4,46,51,100

Document Description

aaaaaaaaaaaaa



(iii) Print

Date/Time	Financial Figures/Particulars	Description	Remarks	Status	Actions
25 15:16:10	1. Particulars : 9768.0 2. PAN of the Assessee/ Auditee : JHGFE3574B 3. Particulars : 9768.0	generating ...more	N/A	Active	Print Revoke
25 15:16:10	1. Particulars : 2000.0 2. Notification No. : 2746.0 3. PAN of the Assessee/ Auditee : HGDUR7456H	Bulk udin	N/A	Active	Print Revoke
25 15:16:10	1. Particulars : 577.98 2. WDV of Fixed Assets : 57 3. Assessment Year : 2020-2021	UDIN	N/A	Active	Print Revoke
25 15:16:10	1. Particulars : 68976.0 2. PAN of the Assessee/ Auditee : CAHPK9706H 3. Particulars : 68976.0	Bulk udin	N/A	Active	Print Revoke
25 15:16:10	1. Particulars : 5688.87	generating ...more	N/A	Active	Print Revoke
25 15:16:10	1. Particulars : 769.0 2. PAN of the Assessee/ Auditee : JHGSS769J 3. Particulars : 769.0	generating ...more	N/A	Active	Print Revoke
25 15:16:10	1. Particulars : 2000.0 2. PAN of the Assessee/ Auditee : ADFFG1234H 3. Particulars : 2000.0	UDIN	N/A	Active	Print Revoke

- (i) Member can select any UDIN and see the details of the particulars and details submitted during generation, by clicking on the UDIN hyperlink.
- (ii) Member can print the UDIN individually.
- (iii) Member can also print all UDIN displayed in the screen, by clicking on PRINT ALL button displayed below.



- (iv) The UDINs will be printed as a single file, with all the UDINs listed individually.
- (v) Details when the document is printed from Print button:

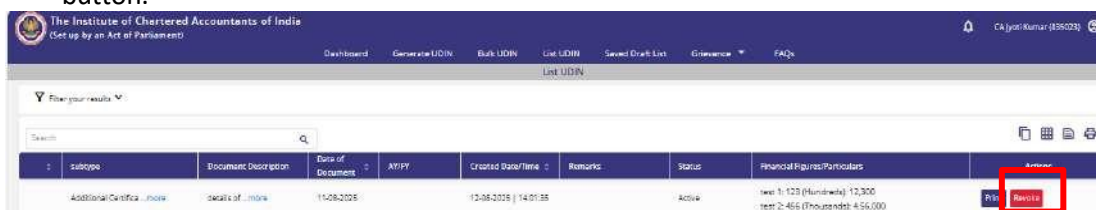
UDIN:	25999995GNNLKX8714		
MRN/Name:	999995 / Chitresh Sagar		
Firm Registration No.:	Not Applicable/Individual Capacity		
Document Type:	GST and Tax Audit		
Particulars of Section / Form under which Report issued:	Form 10 CCB - Section 80-IA (7)		
Date of Signing of Document:	01-12-2025		
AY/FY:	2025-2026		
Created Date/Time:	12-12-2025 10:04:46		
Status:	Active		
Particulars: Figures/Values:			
Particulars	Figures/Values	Denomination	Converted Value
1. Assessment Year	2025-2026		
2. Testing 1	446511	(Hundreds)	4,46,51,100
Document Description:	aaaaaaaaaaaaaa		





(iii) Revoke

- (i) Member can revoke any UDIN generated in past 48 hours.
- (ii) Member can see the details of the UDIN they are revoking after clicking on the revoke button.



- (iii) Users need to provide the reason for revoking the UDIN.

Do you want to Revoke?

Document Type	Certificates
Document Sub Type	Additional Certification by Concurrent Auditors not forming part of concurrent audit assignment
Document Date	01-08-2025
Create Date/Time	08-08-2025 11:20:30
Financial Figures/Particulars	
test data 1 123 (Hundreds)	12,300
test data 2 456 (Thousands)	4,56,000
Document Description	document description for testing
Remarks	description for Remarks
Reason for Revocation: *	

Send OTP **Cancel**

- (iv) Member needs to validate this by sending an OTP and validating the OTP.
- (v) After the UDIN has been revoked, details of the UDIN are sent to member on Email and mobile.
- (vi) Status of the UDIN changes to Revoked in the LIST UDIN section. Once the UDIN is revoked it can't be reinstated.

Status	Financial Figures/Particulars	Actions
Revoked ...more	test 1: 123 (Hundreds): 12,300 test 2: 456 (Thousands): 4,56,000	Print

(iv) Download

- (i) Member can download the UDIN List displayed, in form of CSV, PDF.
- (ii) Member can select any particular UDINs to be downloaded.
- (iii) Member can download all the UDINs displayed together too.



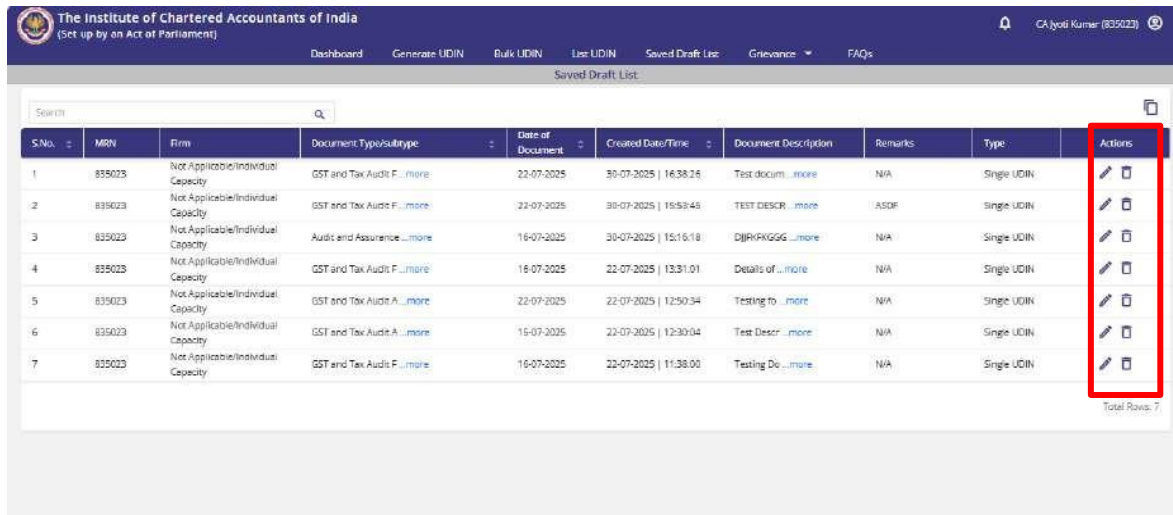
(v) Scroller

- (i) Member can scroll through the screen using the scroller at the bottom of the screen.



6. Save Draft List

SAVE draft option is available at UDIN portal. Due to any reason, if UDIN is not be generated but the details filled, can be saved by clicking on SAVE DRAFT. Under SAVED DRAFT LIST, the list of the all the drafts is listed.



S.No.	MRN	Firm	Document Type/Subtype	Date of Document	Created Date/Time	Document Description	Remarks	Type	Actions
1	835023	Not Applicable/Individual Capacity	GST and Tax Audit F...more	22-07-2025	30-07-2025 16:38:25	Test docum...more	N/A	Single UDIN	[Edit] [Delete]
2	835023	Not Applicable/Individual Capacity	GST and Tax Audit F...more	22-07-2025	30-07-2025 15:53:45	TEST DESCR...more	ASDR	Single UDIN	[Edit] [Delete]
3	835023	Not Applicable/Individual Capacity	Audit and Assurance...more	16-07-2025	30-07-2025 15:15:18	DJIRKGGG...more	N/A	Single UDIN	[Edit] [Delete]
4	835023	Not Applicable/Individual Capacity	GST and Tax Audit F...more	16-07-2025	22-07-2025 13:31:01	Details of...more	N/A	Single UDIN	[Edit] [Delete]
5	835023	Not Applicable/Individual Capacity	GST and Tax Audit A...more	22-07-2025	22-07-2025 12:50:34	Testing to...more	N/A	Single UDIN	[Edit] [Delete]
6	835023	Not Applicable/Individual Capacity	GST and Tax Audit A...more	15-07-2025	22-07-2025 12:30:04	Test Descr...more	N/A	Single UDIN	[Edit] [Delete]
7	835023	Not Applicable/Individual Capacity	GST and Tax Audit F...more	16-07-2025	22-07-2025 11:38:00	Testing Do...more	N/A	Single UDIN	[Edit] [Delete]

Total Rows: 7

1. Member can find all the UDIN forms that have been saved.
2. Member can delete or retrieve the draft.
3. Once the draft is deleted it can't be retrieved.
4. If the member selects to edit the Draft, it will be redirected to generate UDIN screen.
5. Member can search for drafts using text search functionality.
6. Each row reflects an individual draft entry with key editable fields:
 - **Edit:** This option takes the member back to the generate UDIN section, with form filled till the Saved Draft option was used.
 - **Delete:** This option lets members delete the draft permanently.

(vi) Drafts remain available until submitted or deleted.

7. FAQs

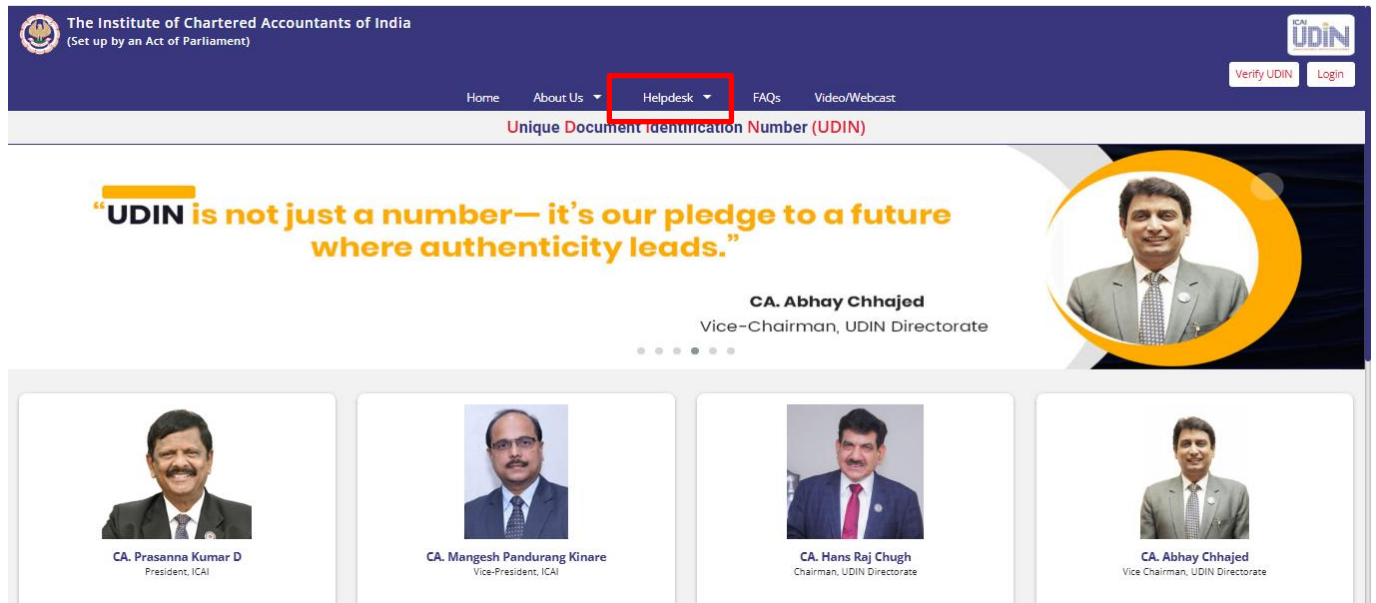
When member click the **FAQ** link from the UDIN portal, they're redirected to a comprehensive help document titled:

<https://udin.icai.org/assets/images/FAQs%20on%20UDIN.pdf>

Addendum to FAQs on UDIN Ceiling for Tax Audit

<https://udin.icai.org/assets/images/FAQs on UDIN Ceiling on Tax Audit.pdf>

8. Grievance

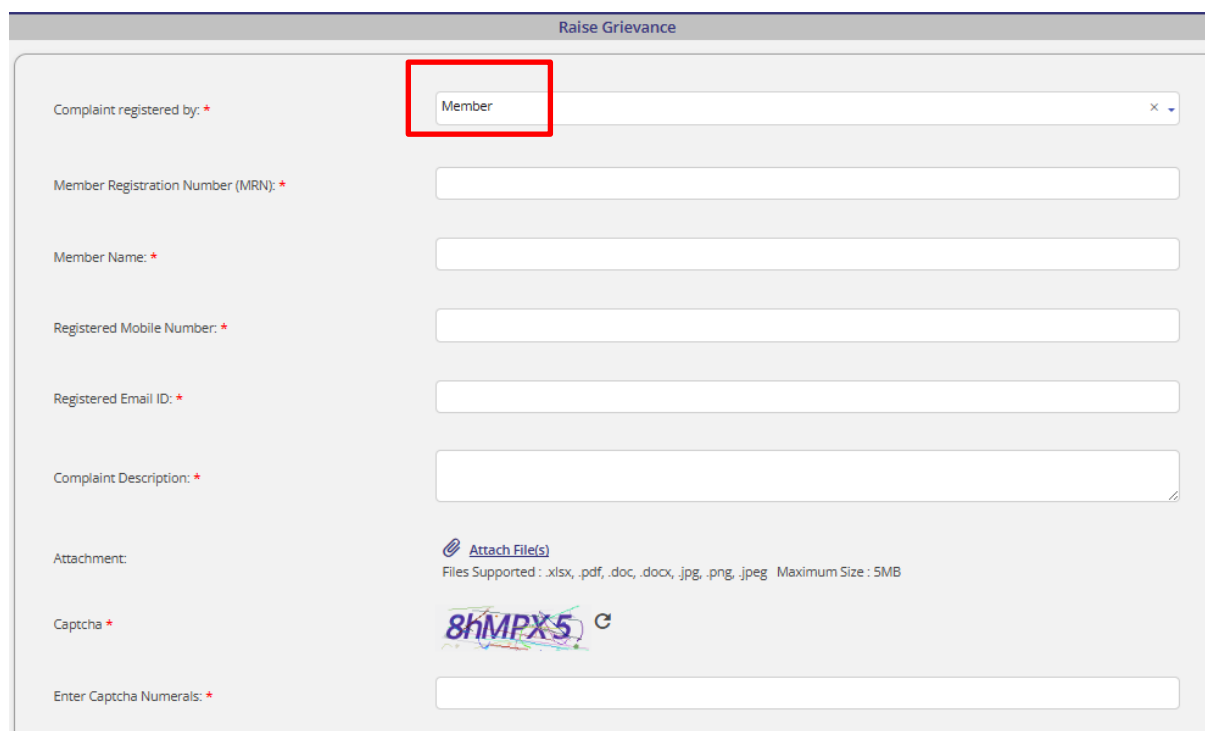


- (i) **Raise Grievance:** Enables users to lodge complaints, report any issues encountered with UDIN, or provide suggestions.
- (ii) **Grievance Status:** Allows users to track the status of previously submitted grievances, offering transparency and follow-up clarity.

(i) 📄 Raise Grievance

The **Raise Grievance** form enables users to submit complaints /issues/suggestions related to UDIN.

🚦 If select **Member** from the dropdown, the MRN, name, mobile number, and email ID need to be entered:

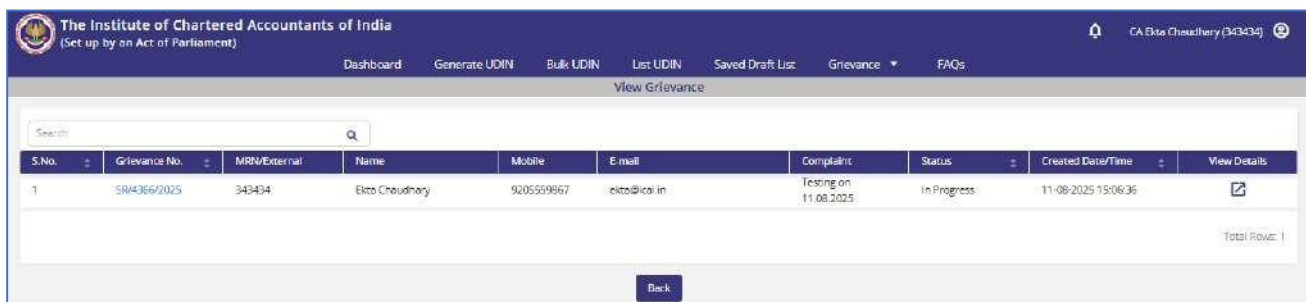


Form Field:

- (i) **Complaint Description:** Enter the issue/complaint/suggestions related to UDIN within 1,000 characters.
- (ii) **Attachment:** A new functionality has been introduced for the benefit of members. Users can now upload attachments
 - Supported Formats: .xlsx, .pdf, .doc, .docx, .jpg, .png, .jpeg
 - Maximum File Size: 5 MB
- (iii) Enter Captcha.
- (iv) Click on '**Send OTP**' (OTP will be sent to the mobile number registered with SSP). The user can validate the OTP within 90 seconds. A maximum of 5 attempts are allowed. If all attempts are exhausted, the member may retry after some time.
- (v) After validating the OTP, click on the **Submit** button to submit the grievance. A unique grievance number will be generated and shared on the email ID registered with SSP.



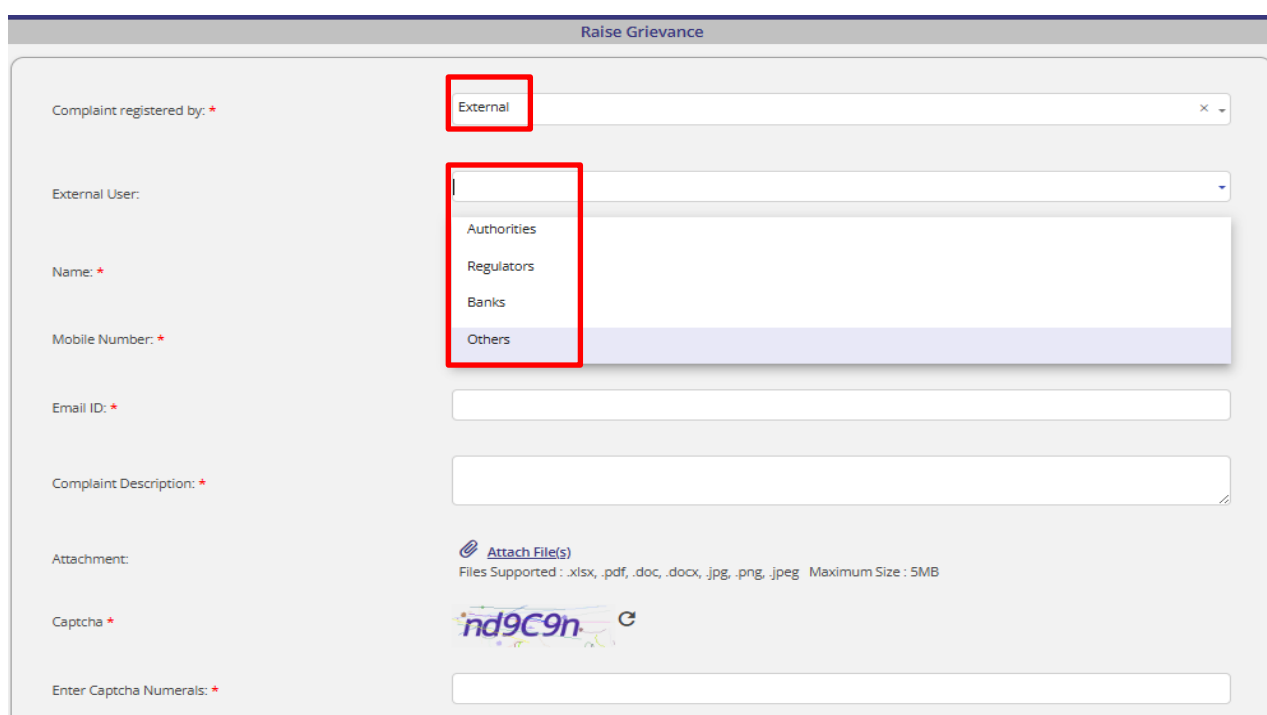
Please note: Members can also view the status of their grievance in their dashboard by simply logging into their account.



The screenshot shows the ICAI dashboard with a table titled "View Grievance". The table has columns for S.No., Grievance No., MRN/External, Name, Mobile, E-mail, Complaint, Status, Created Date/Time, and View Details. A single row is visible with the following data: S.No. 1, Grievance No. SRA366/2025, MRN/External 343434, Name Ekta Choudhary, Mobile 920559967, E-mail ekta@icai.in, Complaint Testing on 11.08.2025, Status In Progress, Created Date/Time 11-08-2025 15:06:36. A "Back" button is located at the bottom right of the table.

S.No.	Grievance No.	MRN/External	Name	Mobile	E-mail	Complaint	Status	Created Date/Time	View Details
1	SRA366/2025	343434	Ekta Choudhary	920559967	ekta@icai.in	Testing on 11.08.2025	In Progress	11-08-2025 15:06:36	View Details

If select **External** from the dropdown, the user type, name, mobile number, and email ID need to be entered:

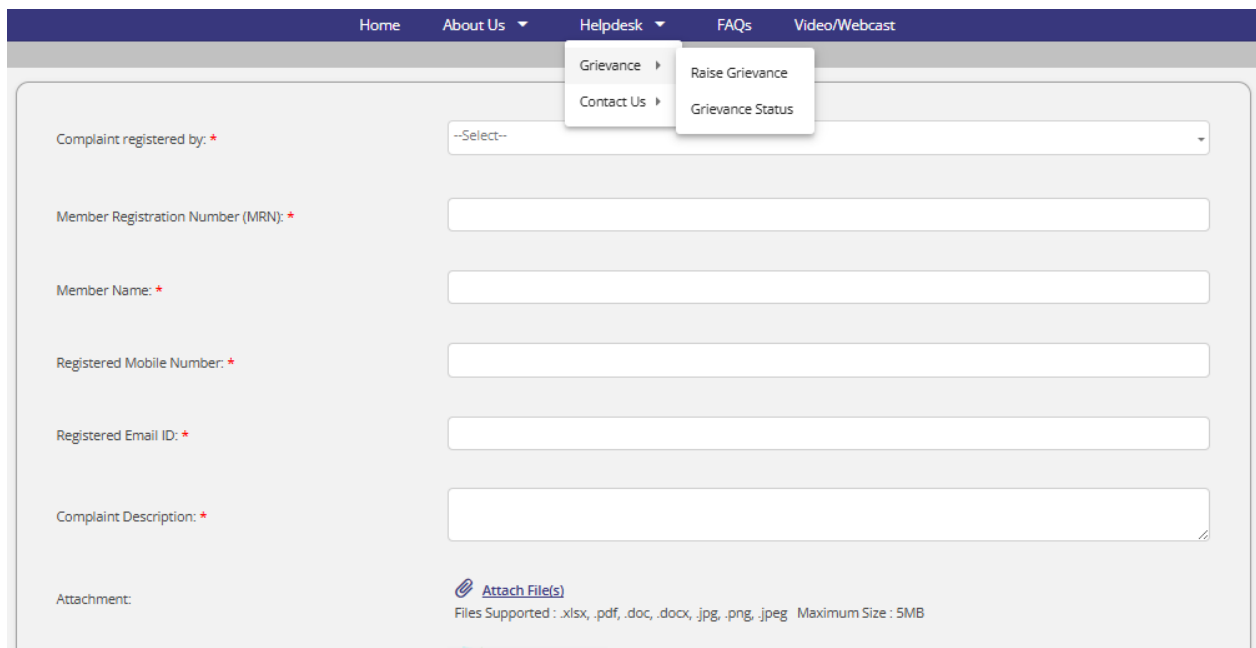


The screenshot shows the "Raise Grievance" form. The "Complaint registered by:" dropdown is set to "External". Below it, the "External User:" dropdown is open, showing options: Authorities, Regulators, Banks, and Others. The "Name:", "Mobile Number:", and "Email ID:" fields are empty. The "Complaint Description:" field is a text area. The "Attachment:" section shows a file upload button and supported file types. The "Captcha" section shows a captcha image and a field to enter the numerals.

- Select option from the drop down on behalf of the verifier who is verifying the UDIN.
- Enter the details such as the Name of the Verifier, Mobile Number, and Email ID of the person verifying the UDIN. Ensure the details are correct, as OTP will be sent to the entered mobile number.
- The remaining steps will remain the same as in the **"If Yes"** case — refer to steps (i) to (v).

(ii) Grievance Status

A single window is provided for members and external users to view their grievances. Click on Grievance Status to view the status of the grievance(s).



The screenshot shows a web application interface for raising a grievance. At the top, there is a navigation bar with links: Home, About Us, Helpdesk, FAQs, and Video/Webcast. A dropdown menu is open under 'Helpdesk', showing options: Grievance, Contact Us, Raise Grievance, and Grievance Status. The main form area contains several input fields: 'Complaint registered by:' with a dropdown menu showing '--Select--'; 'Member Registration Number (MRN):'; 'Member Name:'; 'Registered Mobile Number:'; 'Registered Email ID:'; and 'Complaint Description:'. Below these fields is an 'Attachment:' section with a link to 'Attach File(s)' and a note: 'Files Supported : .xlsx, .pdf, .doc, .docx, .jpg, .png, .jpeg Maximum Size : 5MB'.

Search Grievance:

- (i) Enter Grievance Number (optional).
- (ii) Enter Email Id (Mandatory):
 - Member: Registered with SSP
 - External User: Entered at the time of lodging the complaint
- (iii) Click on the **Sent OTP** button.



The screenshot shows a web application interface for viewing grievance status. At the top, there is a navigation bar with links: Home, About Us, Helpdesk, FAQs, and Video/Webcast. A dropdown menu is open under 'Helpdesk', showing options: Grievance, Contact Us, Raise Grievance, and Grievance Status. The main form area contains two input fields: 'Complaint No' and 'Email-Id *'. Below these fields is a button labeled 'Send OTP'.

- (iv) Validate OTP, and the below screen will appear:

View Grievance

SEARCH

S.No.	Grievance No.	MRN/External	Name	Mobile	E-mail	Complaint	Status	Created Date/Time	View Details
1	SR/4366/2025	001551	Ayushi Sharma	9801657788	ayusha.sharma@icai.org	Testing event	In Progress	22-07-2025 15:52:15	☒
2	SR/2332/2025	001551	Venkut Sai	9291856677	001551@icai.org	test	In Progress	02-04-2025 20:40:46	☒
3	SR/2331/2025	001551	Venkut Sai	9291856677	001551@icai.org	test	In Progress	02-04-2025 20:40:46	☒
4	SR/2330/2025	001551	Venkut Sai	9291856677	001551@icai.org	test	In Progress	02-04-2025 20:40:45	☒
5	SR/2329/2025	001551	Venkut Sai	9291856677	001551@icai.org	test	In Progress	02-04-2025 20:40:45	☒
6	SR/2328/2025	001551	Venkut Sai	9291856677	001551@icai.org	test	In Progress	02-04-2025 20:40:45	☒
7	SR/2327/2025	001551	Venkut Sai	9291856677	001551@icai.org	test	In Progress	02-04-2025 20:40:45	☒
8	SR/2326/2025	001551	Venkut Sai	9291856677	001551@icai.org	test	In Progress	02-04-2025 20:40:44	☒
9	SR/2325/2025	001551	Venkut Sai	9291856677	001551@icai.org	test	In Progress	02-04-2025 20:40:44	☒
10	SR/2324/2025	001551	Venkut Sai	9291856677	001551@icai.org	test	In Progress	02-04-2025 20:40:44	☒

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100 101 102 103 104 105 106 107 108 109 110 111 112 113 114 115 116 117 118 119 120 121 122 123 124 125 126 127 128 129 130 131 132 133 134 135 136 137 138 139 140 141 142 143 144 145 146 147 148 149 150 151 152 153 154 155 156 157 158 159 160 161 162 163 164 165 166 167 168 169 170 171 172 173 174 175 176 177 178 179 180 181 182 183 184 185 186 187 188 189 190 191 192 193 194 195 196 197 198 199 200 201 202 203 204 205 206 207 208 209 210 211 212 213 214 215 216 217 218 219 220 221 222 223 224 225 226 227 228 229 230 231 232 233 234 235 236 237 238 239 240 241 242 243 244 245 246 247 248 249 250 251 252 253 254 255 256 257 258 259 260 261 262 263 264 265 266 267 268 269 270 271 272 273 274 275 276 277 278 279 280 281 282 283 284 285 286 287 288 289 290 291 292 293 294 295 296 297 298 299 300 301 302 303 304 305 306 307 308 309 310 311 312 313 314 315 316 317 318 319 320 321 322 323 324 325 326 327 328 329 330 331 332 333 334 335 336 337 338 339 340 341 342 343 344 345 346 347 348 349 350 351 352 353 354 355 356 357 358 359 360 361 362 363 364 365 366 367 368 369 370 371 372 373 374 375 376 377 378 379 380 381 382 383 384 385 386 387 388 389 390 391 392 393 394 395 396 397 398 399 400 401 402 403 404 405 406 407 408 409 410 411 412 413 414 415 416 417 418 419 420 421 422 423 424 425 426 427 428 429 430 431 432 433 434 435 436 437 438 439 440 441 442 443 444 445 446 447 448 449 450 451 452 453 454 455 456 457 458 459 460 461 462 463 464 465 466 467 468 469 470 471 472 473 474 475 476 477 478 479 480 481 482 483 484 485 486 487 488 489 490 491 492 493 494 495 496 497 498 499 500 501 502 503 504 505 506 507 508 509 510 511 512 513 514 515 516 517 518 519 520 521 522 523 524 525 526 527 528 529 530 531 532 533 534 535 536 537 538 539 540 541 542 543 544 545 546 547 548 549 550 551 552 553 554 555 556 557 558 559 560 561 562 563 564 565 566 567 568 569 570 571 572 573 574 575 576 577 578 579 580 581 582 583 584 585 586 587 588 589 590 591 592 593 594 595 596 597 598 599 600 601 602 603 604 605 606 607 608 609 610 611 612 613 614 615 616 617 618 619 620 621 622 623 624 625 626 627 628 629 630 631 632 633 634 635 636 637 638 639 640 641 642 643 644 645 646 647 648 649 650 651 652 653 654 655 656 657 658 659 660 661 662 663 664 665 666 667 668 669 670 671 672 673 674 675 676 677 678 679 680 681 682 683 684 685 686 687 688 689 690 691 692 693 694 695 696 697 698 699 700 701 702 703 704 705 706 707 708 709 710 711 712 713 714 715 716 717 718 719 720 721 722 723 724 725 726 727 728 729 730 731 732 733 734 735 736 737 738 739 740 741 742 743 744 745 746 747 748 749 750 751 752 753 754 755 756 757 758 759 760 761 762 763 764 765 766 767 768 769 770 771 772 773 774 775 776 777 778 779 780 781 782 783 784 785 786 787 788 789 790 791 792 793 794 795 796 797 798 799 800 801 802 803 804 805 806 807 808 809 810 811 812 813 814 815 816 817 818 819 820 821 822 823 824 825 826 827 828 829 830 831 832 833 834 835 836 837 838 839 840 841 842 843 844 845 846 847 848 849 850 851 852 853 854 855 856 857 858 859 860 861 862 863 864 865 866 867 868 869 870 871 872 873 874 875 876 877 878 879 880 881 882 883 884 885 886 887 888 889 890 891 892 893 894 895 896 897 898 899 900 901 902 903 904 905 906 907 908 909 910 911 912 913 914 915 916 917 918 919 920 921 922 923 924 925 926 927 928 929 930 931 932 933 934 935 936 937 938 939 940 941 942 943 944 945 946 947 948 949 950 951 952 953 954 955 956 957 958 959 960 961 962 963 964 965 966 967 968 969 970 971 972 973 974 975 976 977 978 979 980 981 982 983 984 985 986 987 988 989 990 991 992 993 994 995 996 997 998 999 1000

Back

- (i) The **Back** button returns to the previous screen without saving any changes.
- (ii) To know the status of the grievance, click on **View Details**, and the below screen appear:

Request Details Activity Log

Grievance No: SR/4366/2025 MRN: 343434 Name: Ekta Chaudhary

Status: Resolved Created Date: 11-08-2025 15:06:36 Email: ekta@icai.in

Complaint: Testing on 11.08.2025

Re-Open

- (iii) The user can re-open the grievance, if needed, by clicking on the **Re-open** button.
- (iv) The user can also check the **Activity Log**, where activities are listed in reverse chronological order to highlight the latest updates first

Request Details Activity Log

11 August 2025

15:56 Ekta Testing

15:06 Ekta Chaudhary Testing on 11-08-2025

9. Verify UDIN

The **Verify UDIN** feature allows users—such as authorities, regulators, banks, and other—to verify a UDIN issued by full time COP holders on real time basis.

- (i) Single Verify
- (ii) Bulk Verify

(i) Single Verify

In case of Single Verify the following fields need to be entered by the verifier:

- Select the type of verifier that applies from the dropdown.
- Enter the name of the verifier.
- Enter the mobile number where the details will be sent along with OTP.
- Enter the email id where the details will be sent along with the OTP.
- User needs to select **Single Verify** option.
- User has to provide the UDIN number that has to be verified.
- User need to enter the Captcha

VERIFY UDIN BY AUTHORITIES/REGULATORS/BANKS/OTHERS
(Please provide the following mandatory information to Verify UDIN)

Verifier*
Regulators

Name of Verifier*
BANK

Enter Mobile No*
+91 882
Invalid Mobile Number 9/10 Characters

Enter E-mail*
jyoti0723@gmail.com

Type of UDIN Verification*
☒ Single Verify ☐ Bulk Verify

Enter Unique Document Identification Number(UDIN)*
0/18 Characters

atA6k
Enter Captcha

☐ It is certified that the information provided by the aforementioned verifier is correct and is not impersonating any other Regulations/Authorities/Banks etc.

Send OTP

- After user clicks on Send OTP , two unique OTPs are sent to the mobile number and email id mentioned above.
- User needs to verify each OTP individually before proceeding.

Enter Email OTP

Verify OTP

Enter Mobile OTP

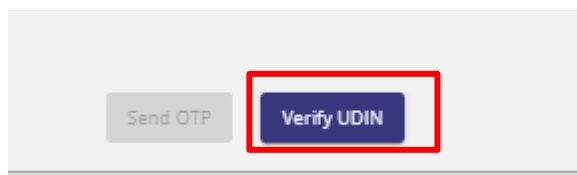
Verify OTP

Please wait 87 seconds before resending OTP.

Resend OTP

Remaining attempts: 4

- After the OTPs are verified, user will get an option to Verify the UDIN.



- k) After user clicks on Verify UDIN, a pop up appears with message that ***“UDIN has been Verified Successfully”***.



- l) After the user clicks on OK, the details of the verified UDIN appear.
 m) User has an option to Print the details of the verified UDIN.
 n) User will get a message in the document, if the UDIN can be revoked or not, basis the timeframe of generation.

Document Details			
Verification Date/Time	14-12-2025 13:41:37		
Created Date/Time	12-12-2025 10:04:46		
UDIN	25999995GNNLKX8714		
This UDIN can't be revoked any more			
MRN/Name	999995 / Chitresh Sagar		
Firm Registration No.	Not Applicable/Individual Capacity		
Document Type	GST and Tax Audit		
Particulars of Section / Form under which Report issued	Form 10 CCB - Section 80-IA (7)		
Date of Signing of Document	01-12-2025		
Particulars : Figures/Values			
Particulars	Figures	Denomination	Converted Value
1 . Assessment Year	2025-2026		
2 . Testing 1	446511	Hundreds	44651100
Document Description	aaaaaaaaaaaaaa		
Status	Active		

Print

(ii) Bulk Verify

In case of Bulk Verify the following fields need to be entered by the verifier:

- Select the type of verifier that applies from the dropdown.
- Enter the name of the verifier.
- Enter the mobile number where the details will be sent along with OTP.
- Enter the email id where the details will be sent along with the OTP.

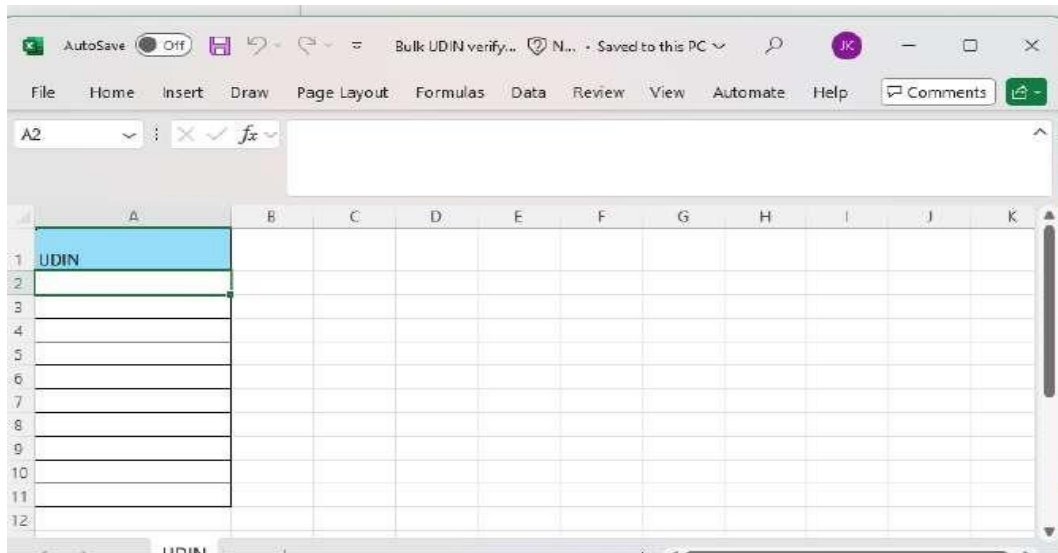
e) User needs to select **Bulk Verify** option.

The screenshot shows a web form for JtKIX verification. The form includes fields for Verifier*, Name of Verifier*, Enter Mobile No* (with a country code dropdown), Enter E-mail*, and Type of UDIN Verification*. The 'Bulk Verify' radio button is selected and highlighted with a red box. Below the radio buttons are links for 'Click here to Download Template', 'Download Template', and 'Upload File'. There are two rows for entering UDIN Numbers, each with a label 'UDIN Number*' and an input field. An 'Add Row' button is at the bottom left. A captcha section with the JtKIX logo and 'Enter Captcha' is at the bottom. A disclaimer at the very bottom states: 'It is certified that the information provided by the aforementioned verifier is correct and is not impersonating any other Regulations/Authorities/Banks etc.'

f) User has the option to download the template and upload the UDINs in the same template.

This screenshot is similar to the previous one, showing the JtKIX verification form. In this view, the 'Bulk Verify' radio button is still selected, but the 'Download Template' and 'Upload File' buttons are highlighted with a red box. The rest of the form, including the UDIN input fields, captcha, and disclaimer, remains the same.

Template



- g) User also has the option to provide the UDIN number that has to be verified, on the UI screen, up to a limit of 10.

A screenshot of a web form for UDIN verification. At the top, there are two radio buttons: 'Single Verify' and 'Bulk Verify' (which is selected). To the right of 'Bulk Verify' is the text '(Maximum 10 UDINs Allowed)'. Below the radio buttons are three buttons: 'Click here to Download Template', 'Download Template', and 'Upload File'. The main part of the form consists of four rows, each with a number (1, 2, 3, 4) and a label 'UDIN Number*'. To the right of each label is a text input field. These four input fields are highlighted with red rectangular boxes. At the bottom of the form are two buttons: '+ Add Row' and 'Delete Last Row'.

- h) User needs to enter the Captcha.
- i) After user clicks on Send OTP , two unique OTPs are sent to the mobile number and email id mentioned above.
- j) User needs to verify each OTP individually before proceeding.

- k) After the OTPs are verified, user will get an option to Verify the UDIN.

- l) After user clicks on Verify UDIN, a pop up appears with message that ***“X:UDINs Verified Successfully”, X is the number of UDIN.***



- m) After the user clicks on OK, the details of the verified UDIN appear, in a LIST format.
- n) User has an option to download the details of the verified UDIN, in a PDF format.

✓	Member Details	Firm Details	UDIN Number	Document Type	Document Sub Type	Date of signing of Document	UDIN Generation Date/Time	Verification Date/Time	Status
✓	2000-nul Number (825023)	Not Applicable/Individual Capacity	2582502375PKN2551	GST and Tax Audit	Form 10 OCB - Section 80 (1) (7)	03-08-2025	04-08-2025 16:20:45	12-08-2025 11:38:54	Verified
✓	2000-nul Number (825023)	Not Applicable/Individual Capacity	25825023WPLWRO5096	Certificate	MDT-7 / MDT-TA	04-08-2025	05-08-2025 11:58:50	12-08-2025 11:38:54	Verified
✓	2000-nul Number (825023)	Not Applicable/Individual Capacity	25825023LPLUDC1856	GST and Tax Audit	Form 3CE - Section 44AB(i)	04-08-2025	05-08-2025 12:21:17	12-08-2025 11:38:54	Verified
✓	2000-nul Number (825023)	Not Applicable/Individual Capacity	25825023KZFG88601	Audit and Assurance Functions	Stationary Audit - Bank Branch	04-08-2025	05-08-2025 12:29:03	12-08-2025 11:38:54	Verified

Total Rows: 4