

सत्यमेव जयते

Department of Telecommunications
Ministry of Communications
Government of India



सम्पन्न जीवन, निश्चिन्त जीवन

System for Accounting and Management of Pension (SAMPANN)

COMPREHENSIVE PENSION MANAGEMENT SYSTEM

User Manual

Volume I

Version: 6.2

Wednesday, August 7, 2019

Document Version

Sl. No.	Version	Release Date	Remarks
1	1.0	11-10-2018	First version of CPMS User Manual. Does not include details for Arrears.
2	2.0	29-10-2018	Second Version of CPMS user Manual Updation of PDA module
3	3.0	22-11-2018	Third Version of CPMS user Manual Updated in What's New In Version 3.0 Section
4	4.0	27-12-2018	Fourth Version of CPMS user Manual Updated in What's New In Version 4.0 Section
5	5.0	22-04-2019	Fifth Version of CPMS user Manual Updated in What's New In Version 5.0 Section
6	6.0	19-05-2019	Six Version of CPMS user Manual Updated in What's New In Version 6.0 Section
6	6.1	18-06-2019	Minor modification in chapter on Revision
7	6.2	02-08-2019	Income Tax Module

Executive Summary

“Sanchar Pension, Seedha Vitaran”

The Government of India under the leadership of the Honorable Prime Minister has been actively pursuing the objective of “Minimum Government, Maximum Governance”. This envisages providing Paperless, Cashless and Faceless services across the country, especially in rural and remote parts of India. The Finance wing of Department of Telecom (DoT) has taken several initiatives to digitalize and provide e-solutions for ease of governance. These include digital payments, online receipts, direct payment of GPF for BSNL employees, registration of pensioners through Jeevan Pramaan Portal for Life Certification, etc.

In the current system of pension payments for telecom pensioners, pension for 3.5 lakh DoT and BSNL retirees is being sanctioned and authorized by the Controller of Communication Accounts (CCA) Offices. The pension is thereafter disbursed on commission basis by intermediary Agents-Banks and Post Offices to the pensioners. The amount of pension paid is to the tune of Rs. 10500 crores per annum. Another 1.5 lakh retirees are expected to be added in the near future.

There were, however, several shortcomings in the current system. These includes delays in disbursement of the first pension due to time taken in physical movement of PPO from sanctioning authorities to banks or to Post Offices, delay in payment of arrears of pension after revisions, wrong disbursement of pension, difficulty and delay in redressal of pensioners’ grievances, non-refund of excess payment by Banks/ Post Offices to the Telecom Department, paper based ineffective audit, etc.

In order to mitigate the problems faced by pensioners, the Department has decided to introduce a seamless pension processing system through integrated software, which would bring the processing, sanctioning, authorization and payment of pensions under a common platform.

The pensioners, who are the most important stakeholders in this initiative, will share a common touch point with the offices of the Pr. CCAs/CCAs (in the field) for looking after their interests and settling any queries/grievance they may have related to their pensions. These offices will be a single window for all issues of the telecom pensioners thereby affording a great relief to the senior citizens who served the department with dedication.

Table of Contents

Executive Summary.....	2
Table of Contents.....	3
Definitions and Acronyms.....	8
What's New.....	9
What's New in Version 3.0	9
What's New in Version 4.0	9
What's New in Version 5.0	9
What's New in Version 6.0	9
What's New in Version 6.2	10
CHAPTER 1.....	11
1.1 SAMPANN	11
1.2 Users	11
1.3 Launching& Logging into CPMS	11
1.4 CPMS Dashboard and Administrator Role	12
1.4.1 Administrator.....	13
1.5 User Creation &Management.....	18
1.5.1 Unit wise Login Verticals creation in CPMS	18
1.6 System Administrator	18
1.6.1 Administrator and CCA login	18
1.7 Collection &Submission of Pension Papers	20
1.7.1 For BSNL and DoT offices	20
1.7.1.1 HoO Creation	20
1.7.1.2 DH Creation	21
1.8 Processing and Sanction of Pension	23
1.8.1 AO Creation	23
1.8.2 AAO Creation	25
1.8.3 DH Creation	26
1.9 Disbursement of Pensionary Benefits and Pension.....	28
1.9.1 AO Creation	28
1.9.2 AAO Creation	29
1.9.3 DH Creation	31
CHAPTER 2.....	34

2. HoO Unit	34
2.1 Normal Pension Case	34
2.1.1 Creation of Retiree Profile	34
2.1.2 Service Book Verification (12M BDR)	36
2.1.3 Send Form to Retiree (8M BDR)	36
2.1.4 Form Received (6M BDR)	38
2.1.5 Form Verification (4M BDR)	39
2.1.6 Form 7	40
2.1.7 Form 8	44
2.1.8 Send to PAO	45
2.1.9 View Forms	45
2.2 Family Pension Case.....	46
2.2.1 Personal Detail	46
2.2.2 Service Verification (Family Pension case)	50
2.2.3 Form 14	51
2.2.4 Form 12	54
2.2.5 Form 18	55
2.2.6 Send to PAO	58
2.2.7 View Forms	58
CHAPTER 3.....	59
3. Pension Sanctioning Section.	59
3.1 Allotment of Pension Case to DH.....	59
3.2 Form Received	59
3.3 Pay Regulation	61
3.4 Account Enfacement.....	62
3.5 Revise Form List	64
3.6 Calculation Sheet	68
3.7 Pension Sanction.....	71
CHAPTER 4.....	74
4. PDA Section.....	74
4.1 Allotment of Pension Case.....	74
4.2 Vendor Verification in PFMS.....	75
4.3 Bill Generation	77
4.4 PFMS Payment.....	79

4.5 Arrears.....	81
4.6 Monthly Bill.....	84
CHAPTER 5.....	86
5. Retiree Module	86
5.1 Retiree Dashboard	86
5.2 Fill & Submit Forms	87
5.2.1 Pensioners Details	87
5.3 Updation of Mobile, Email and address	94
5.3.1 Mobile Number Update	95
5.3.2 Email ID Update	96
5.3.3 Address Update	97
5.4 Lodge Grievance.....	98
5.5 View documents and Ledger	99
5.6. Income Tax Module	100
5.6.1 Proposed Investment Declaration	100
5.6.2 Actual Investment Declaration	105
CHAPTER 6.....	110
6. Grievance Management	110
6.1 Pensioner Grievance	110
6.2 Allotment of Grievance to DH.....	111
6.3 Grievance Resolution	112
CHAPTER 7.....	114
7. DSC Registration.....	114
CHAPTER 8.....	133
8.1 Annexure 1 (Side Channel User Creation)	133
8.2 HoO Unit- Side channel (Steps for Processing a Case)	136
8.2.1 Normal Pension Case	137
8.2.1.1 Creation of Retiree Profile	137
8.2.1.2 Service Book Verification	138
8.2.1.3 Send Form to Retiree	139
8.2.1.4 Form Received	140
8.2.1.5 Form Verification	141
8.2.1.6 Form 7	141
8.2.1.7 Form 8	144

8.2.1.8 Send to PAO.....	144
8.2.1.9 View Forms.....	145
8.2.2 Family Pension Case.....	145
8.2.2.1 Personal Detail.....	145
8.2.2.2 Service Verification (Family Pension case).....	149
8.2.2.3 Form 14.....	150
8.2.2.4 Form 12.....	153
8.2.2.5 Form 18.....	154
8.2.2.6 Send to PAO.....	157
8.2.2.7 View Forms.....	157
Chapter 9.....	158
9. ID Card Generation.....	158
9.1 Upload AO Pension signature.....	158
9.2 Generate ID Card.....	159
Chapter 10.....	161
10. Revision.....	161
10.1 Revision in the rate of DA.....	161
10.2 Revision Due to Withheld Amount.....	167
10.3 Revision on account of Pay revision/Court Order.....	173
10.4 Revision of Pension to FP (No eligible family member mentioned in PPO).....	180
10.5 Revision of Pension to FP (Eligible family member mentioned in PPO).....	188
Chapter 11.....	195
11.Profile Authentication.....	195
11.1 Retiree Profile Authentication.....	195
Chapter 12.....	199
12. Upload utility.....	199
Chapter 13.....	202
13. Bill / Payment slip generation.....	202
Chapter 14.....	204
14. Updation of Mobile, Email and address.....	204
14.1 Mobile Number Update.....	205
14.2 Email ID Update.....	206
14.3 Address Update.....	207

Chapter 15.....	208
15. Other pension Types.....	208
15.1 Compulsory retirement.....	209
15.2 Compassionate Allowance.....	212
15.3 Miscellaneous issues.....	214
Chapter 16.....	215
16. Income Tax Processing.....	215

Definitions and Acronyms

Abbreviation / Term	Description
AAO	Assistant Account officer
ACCA	Assistant Controller of Communication Accounts
AE	Account Enfacement
AO	Accounts Officer
CCA	Controller of Communication Accounts
CGCA	Controller General of Communication Accounts
DH	Dealing Hand
DSC	Digital Signature Certificate
HoO	Head of Office
LPD	Last Pay Drawn
M / BDR	Month / Before Date of Retirement
PAO	Pay & Accounts Office
PDA	Pension Disbursement Authority
PFMS	Public Financial Management System

What's New

What's New in Version 3.0

- Instruction for DH PDA amended in PDA module, relating to sending EPPO and Sanction hard copies to different sections (Page 73, sub heading 4.1).
- Instructions for AO Cash/PFMS amended in PDA module, relating to payment from PFMS (Page 80, sub heading 4.4).
- Instructions for creation of HoO and DH amended, relating to role assignment to officers (Page 15, sub heading 1.5.1).
- Instructions for filling Form 7 (Page 43, sub heading 2.1.6), Form 18 (Page 56, sub heading 2.2.5) and editing calculation sheet on (Page 67, sub heading 3.5).
- Instructions for filling bank details in Form 14 amended (Page 52, sub heading 2.2.3).
- Instructions for filling bank details in Form 12 amended (Page 53, sub heading 2.2.4).
- Instructions for filling bank details in Pensioner profile amended (Page 91, sub heading 5.2.1).
- Instructions for AO pension section (after DSC) amended, relating to enclosures to be forwarded to AO PDA (Page 72, sub heading 3.7).
- Instructions in Vendor verification of PDA section amended, relating to PDA Utility tab (Page 74, sub heading 4.2).
- Arrear Section (Page 82, sub heading 4.5)
- Manual for DSC installation (Page 97 onwards).

What's New in Version 4.0

- Reference for Side Channel creation in Annexure 1 (Page 17, sub heading 1.7.1.1).
- Instructions for filling Retiree Profile (Page 32, sub heading 2.1.1).
- Instructions for correction needed in Form 7 and Form 8 (Page 42, sub heading 2.1.7).
- Instructions for filling Form 12 (Page 51,52, sub heading 2.2.4).
- Instructions while allot case to DH by AO Pension (Page 56, sub heading 3.1).
- Instructions for AE Generated in Pension Section (Page 61, sub heading 3.4).
- Instructions for filling Pension Sanction (Page 68, sub heading 3.7).
- Instructions for filling Monthly Bill (Page 82, sub heading 4.5).
- Annexure 1 for Side Channel User creation (Page 117 onwards).

What's New in Version 5.0

- Reference for ID Card Generation for CDA Pensioners (Page 142, sub heading 9.1)
- Instructions for taking print of ID Card (Page 144, sub heading 9.2)

What's New in Version 6.0

- Addition of 10. Revision of Pension Module (Page 146, sub heading 10)
- Addition of 11. Profile Authentication (Page 34 , 124 and 176)

- Addition of chapter 12. Upload utility to chapter 15. Other Pension Types
- Addition of 5.3 to 5.5 in Retiree Module

What's New in Version 6.2

- Addition in chapter 5- 5.6 Income Tax Module
- Addition in Chapter 16. Income Tax Processing

CHAPTER 1

1.1 SAMPANN

SAMPANN(System for Accounting and Management of Pension) is brand Name for Comprehensive Pension Management System(CPMS) ,a web portal for Pension Processing, Direct Disbursement, Accounting and Auditing of Pension and Pensionary Benefits to Pensioners of Department of Telecommunication. It has been designed with the following objectives:

- Direct Credit of pensionary benefits and pension to Pensioners' Bank Account.
- Bringing greater transparency in processing of pensions.
- Reducing delays in disbursement of pension and arrears of pension.
- Digitization of forms and streamlining in HoO and CCA offices to reduce time and effort.
- Optimum utilization of resources in processing and disbursement of pension.
- Providing timely updates and alerts to the Pensioners.
- Creating a platform for direct interaction with pensioners for serving them better.
- Improving the quality of service through consistent and standardized work programs.
- Creating a faster and more responsive online grievance registration and redressal system.
- Providing real time MIS to CCA and senior officers of DoT and Controller General of Communication Accounts (CGCA).

1.2 Users

This User Manual has been designed for the needs of different users of the application. The target users are listed below –

- CCA offices
- Other DoT field units
- BSNL field units
- Retiring officers/officials
- Pensioner (including Family Pensioners)
- MIS User

1.3 Launching& Logging into CPMS

Users have to take following steps in order to login in to CPMS application.

1. Enter URL www.dotpension.gov.in in web browser* to go to login screen.
(*the preferred web browser for CPMS use is Google Chrome and for DSC, it is Internet Explorer Version 9 or 11).
2. Enter User Name.

3. Enter Password.
4. Enter Captcha.
5. Click on Login button.



1.4 CPMS Dashboard and Administrator Role

Upon successful logging into CPMS, user will land on the home screen. For consistency, the panel on the left shows the Menu options for selection depending upon the work involved.

Menu is arranged as per the sequence of operation and the frequency of usage depending upon the type of user logged in. (Fig 1.0, 1.1)

Once the selection is made, the information is displayed in tabular form. The top right corner of the screen will show the User (logged in) profile and photograph, if available. The logout option is next to the user detail at the top right.

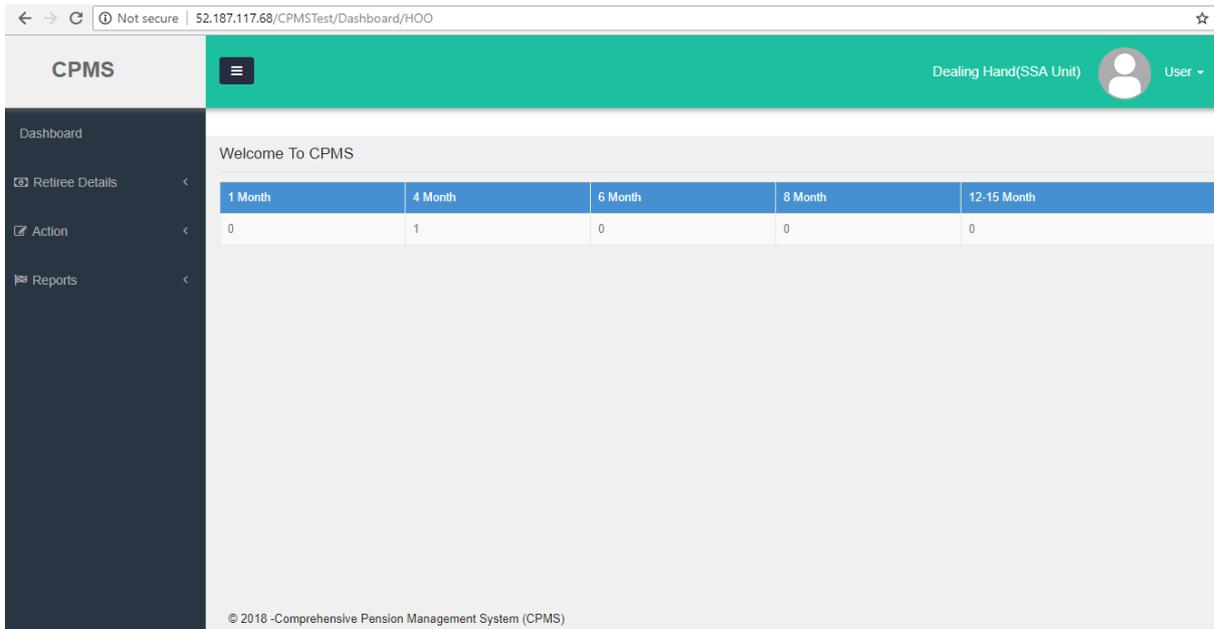


Fig 1.0

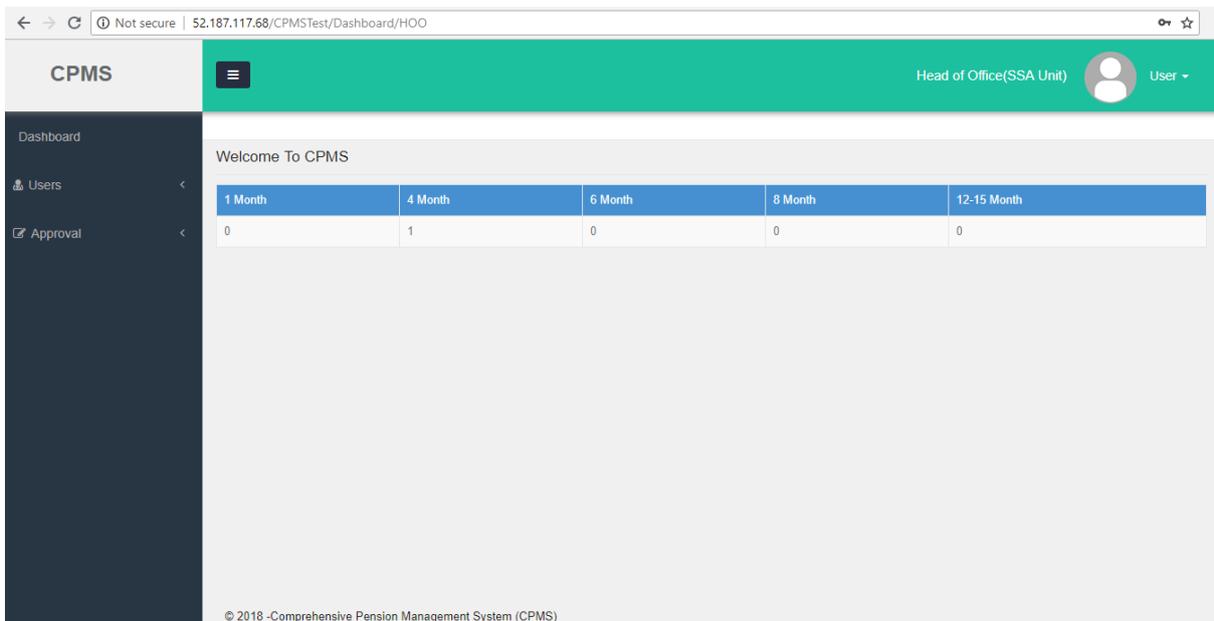


Fig 1.1

1.4.1 Administrator

Administrator logins screen will show the following options to work with. (Fig 1.1.1)

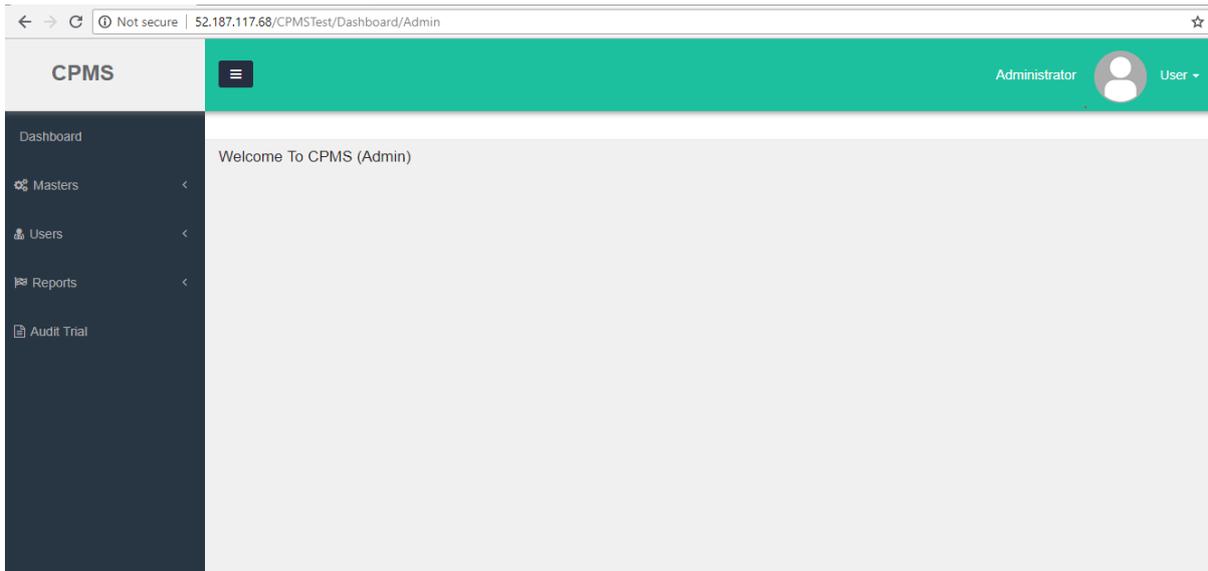


Fig 1.1.1

Masters: This allows the Administrator User to manage the master data of different modules of CPMS. (Fig 1.1.2)

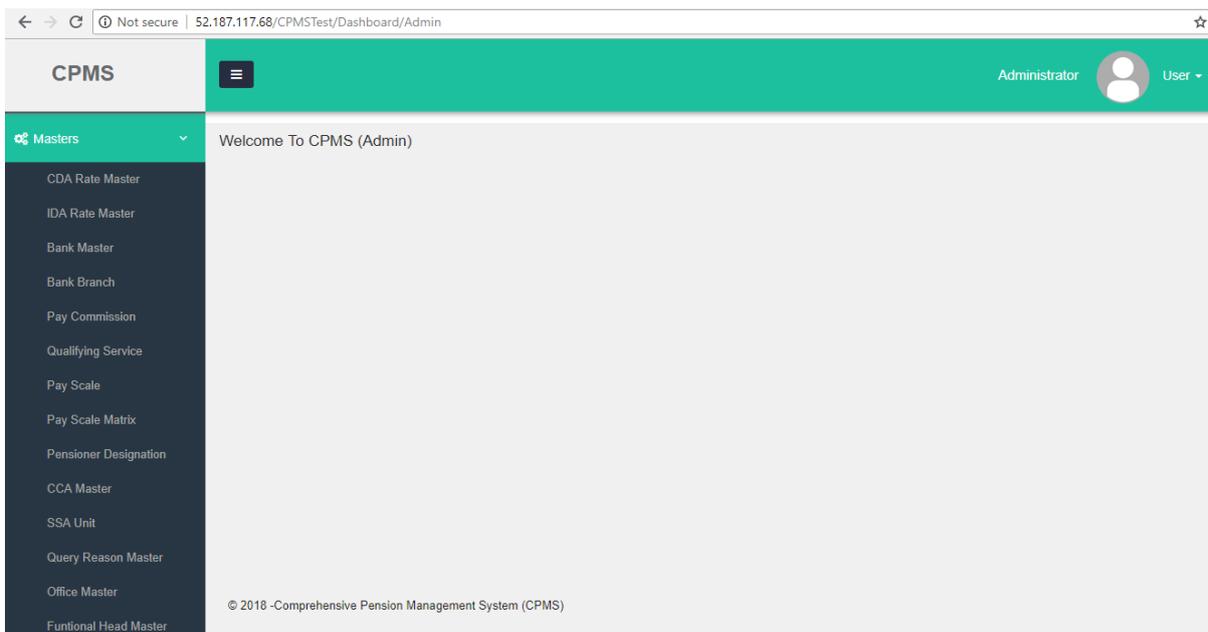


Fig 1.1.2

Users: User section consists of user roles, access rights, user registration and DSC approval. It allows the Administrator User to assign and modify roles, access rights and grant DSC approval to different users. (Fig 1.1.3)

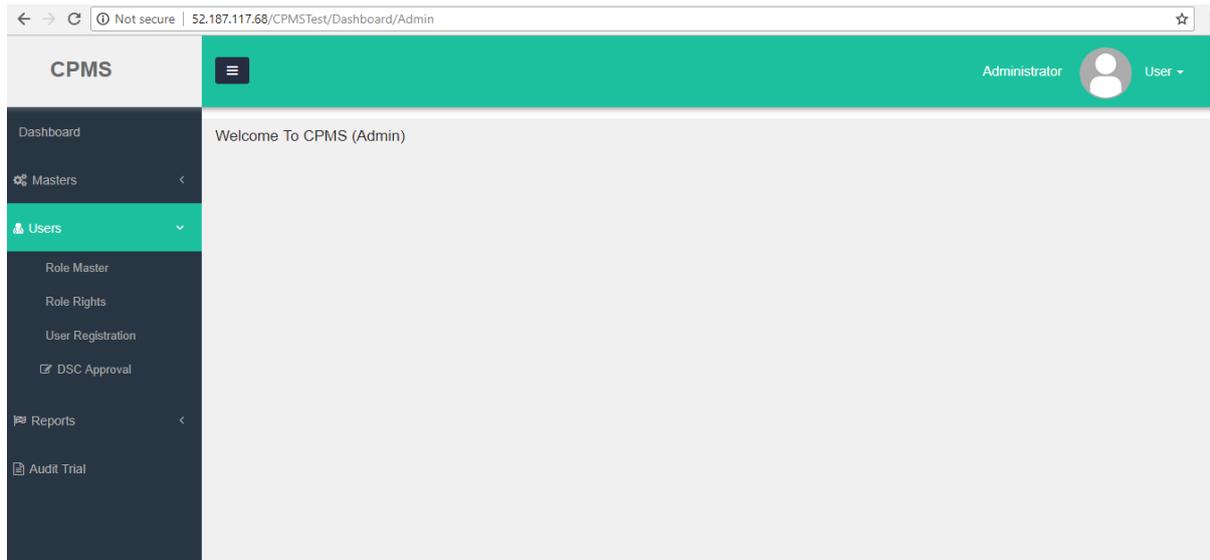


Fig 1.1.3

Role Master: Administrator User can see the different roles available in the Role Master and can also add a new role (Fig 1.1.4)

- **Administrator → Users → Role Master**

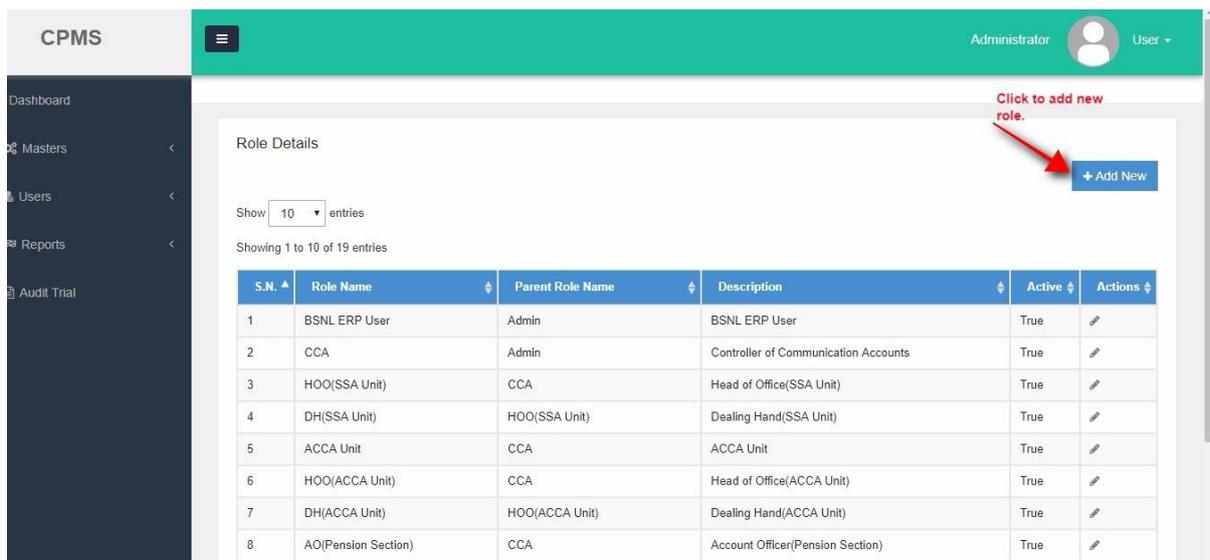


Fig 1.1.4

Role Rights: Administrator User can assign the access rights to the available roles (created by admin) (Fig 1.1.5)

- **Administrator → Users → Role Rights → Click on Action icon of the respective roles to give the access rights.**
- Administrator User can select the respective role from the dropdown and assign the access of modules to it by clicking on check boxes next to the module name. Fig 1.1.5(a)
- Administrator User will click on **Submit** button.

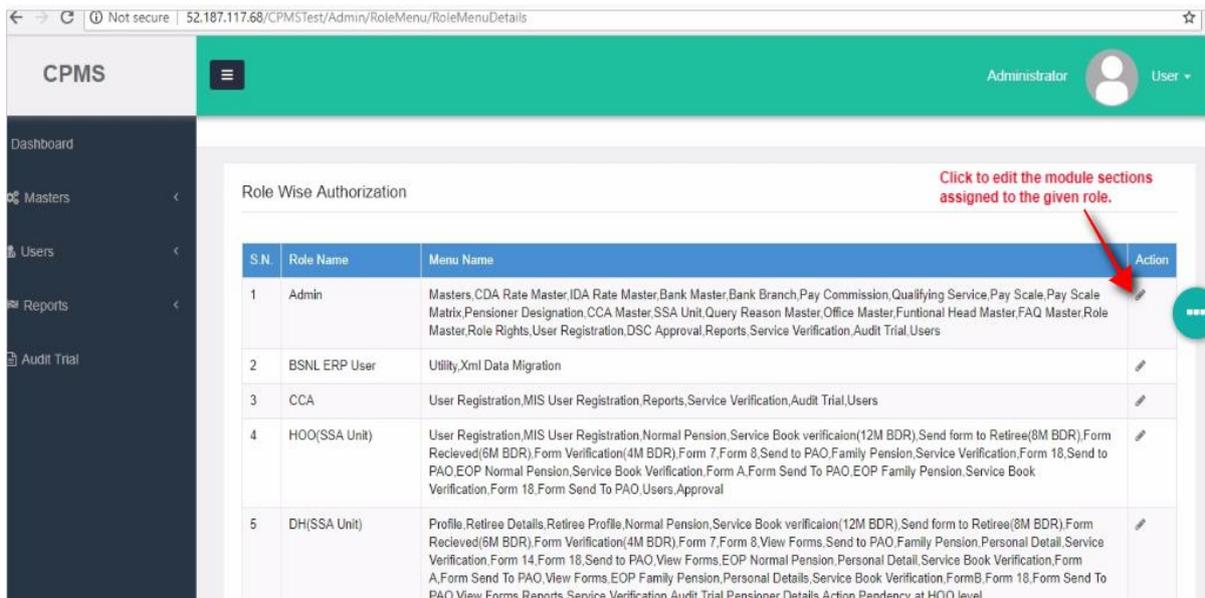


Fig 1.1.5

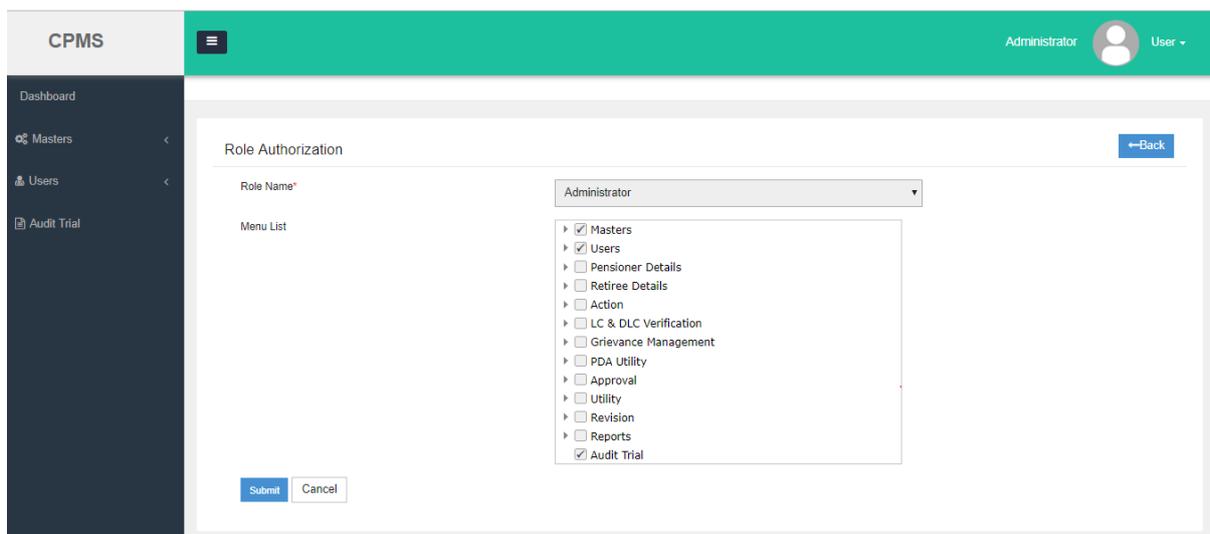


Fig 1.1.5 (a)

User Registration: It shows the list of all the existing users of the application along with the details. Administrator User can also add new user from this screen. (Fig 1.1.6)

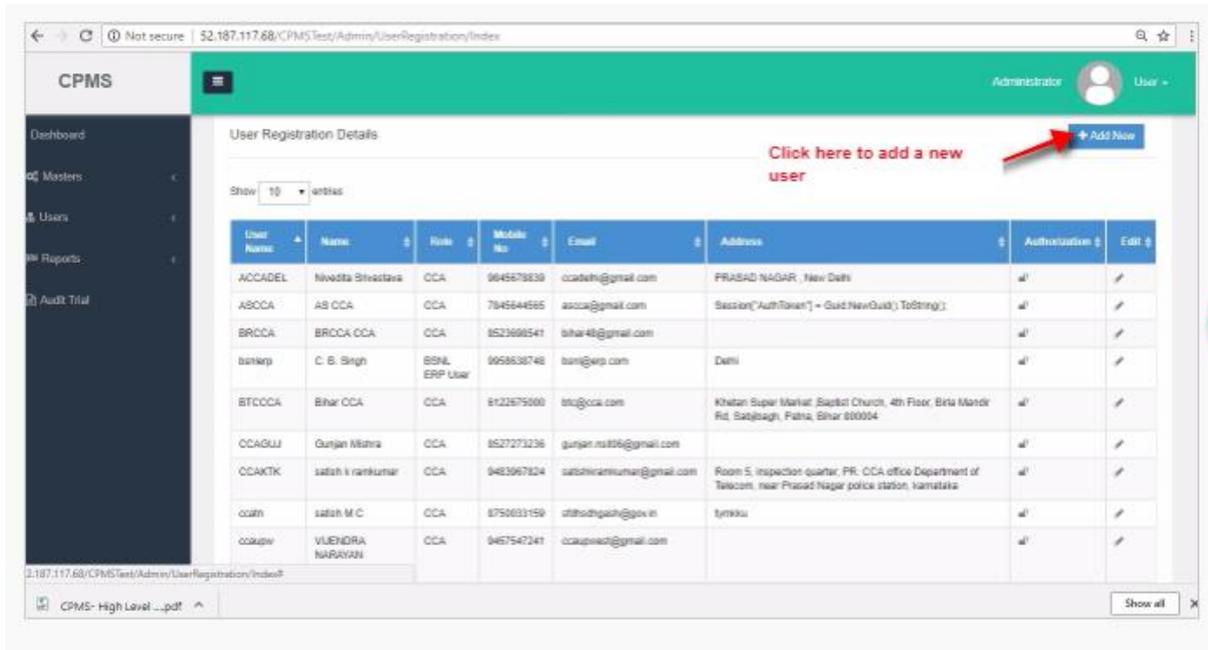


Fig 1.1.6

Reports: This allows the Administrator User to generate the reports as per requirements. (Fig 1.1.7)

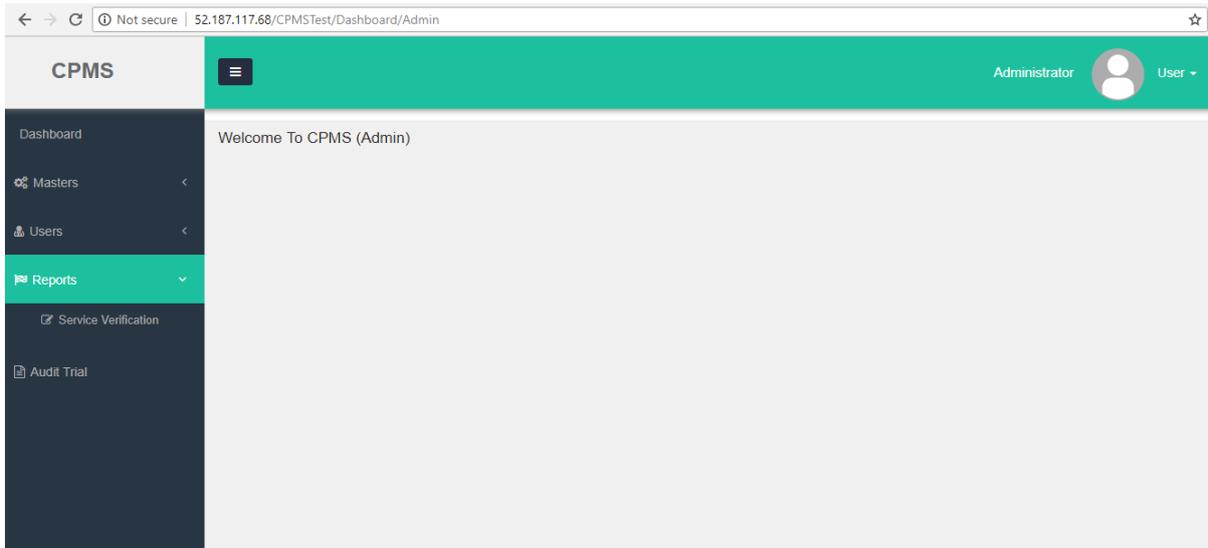


Fig 1.1.7

Audit Trail: This allows the Administrator User to see the workflows and audit trail as per the activities performed. (Fig 1.1.8)

The screenshot shows the CPMS interface with a sidebar on the left containing 'Dashboard', 'Masters', 'Users', 'Reports', and 'Audit Trial'. The main content area is titled 'Audit report' and includes a 'Show 10 entries' dropdown and a search box. Below this is a table with three columns: 'Activity Name', 'Activity By', and 'Activity On'. The table lists 10 entries, all performed by 'Rahul Rahul' on various dates in August 2018. At the bottom, it indicates 'Showing 1 to 10 of 37 entries'.

Activity Name	Activity By	Activity On
Add Family Pension Form12 Details	Rahul Rahul	2018-08-20 14:14:27
Add Nominee	Rahul Rahul	2018-08-17 18:06:44
Add Nominee	Rahul Rahul	2018-08-17 18:06:30
Add Pension Amount Details	Rahul Rahul	2018-08-18 12:46:36
Add Pension Calculation Details	Rahul Rahul	2018-08-18 12:46:35
Add Pensioner Claimant Details	Rahul Rahul	2018-08-20 14:07:48
Add Pensioner Family Details	Rahul Rahul	2018-08-17 17:47:38
Add Pensioner Query	Rahul Rahul	2018-08-18 12:50:15
Add Pensioner Recovery Details	Rahul Rahul	2018-08-18 17:20:35
Add Pensioner Recovery Master	Rahul Rahul	2018-08-18 17:20:35

Fig 1.1.8

1.5 User Creation & Management

1.5.1 Unit wise Login Verticals creation in CPMS

The CCA roles will be created by the System Administrator beforehand. It may be noted that the entire work under CPMS has been segmented into four broad parts as follows:

1. System Administrator.
2. Collection and submission of Pension papers. The HoO and DH terms are used for CCA offices/BSNL offices/Other DOT units for Head of that particular office and Dealing hand. It is recommended HoO should be any officer of the rank of AAO or AO and DH should be officer of the rank below AAO (Sr. Acct./Jr. Acct.).
3. Processing and sanction of Pension.
4. Disbursement of pensionary benefits and monthly pension.

1.6 System Administrator

1.6.1 Administrator and CCA login

- a) Administrator User will create CCA user name/password for login.
- b) CCA or any officer nominated by CCA shall be the highest authority in CCA office for login in CPMS.
- c) Path to create the CCA user: **Login as Administrator → Users → User Registration → Click on "ADD NEW" (fill the user detail and save it).**(Fig 1.3)

Role Details

Show 10 entries

Showing 1 to 10 of 20 entries

S.N.	Role Name	Parent Role Name	Description	Active	Actions
1	BSNL ERP User	Admin	BSNL ERP User	True	
2	CCA	Admin	Controller of Communication Accounts	True	
3	HOO(SSA Unit)	CCA	Head of Office(SSA Unit)	True	
4	DH(SSA Unit)	HOO(SSA Unit)	Dealing Hand(SSA Unit)	True	
5	ACCA Unit	CCA	ACCA Unit	True	
6	HOO(ACCA Unit)	CCA	Head of Office(ACCA Unit)	True	
7	DH(ACCA Unit)	HOO(ACCA Unit)	Dealing Hand(ACCA Unit)	True	
8	AO(Pension Section)	CCA	Account Officer(Pension Section)	True	
9	AAO(Pension Section)	AO(Pension Section)	Assistant Account Officer(Pension Section)	True	
10	DH(Pension Section)	AAO(Pension Section)	Dealing Hand(Pension Section)	True	

+ Add New

Fig 1.3

d) In next step Administrator User will assign roles to CCA.

e) Path to assign the CCA Role and Rights: **Login as Administrator → Users → Role Master → Click on “ADD NEW” (fill the user detail and save it).**(Fig. 1.4&1.5)

User Registration/Add/Edit

Title :* Mr. First Name :* First Name

Middle Name : Middle Name Last Name : Last Name

UserName :* UserName Role :* Controller of Communication Accounts

CCA Name :* Select CCA Mobile No. :* Mobile No.

Email ID :* Email ID

Address : Address

Save Cancel

Fig 1.4

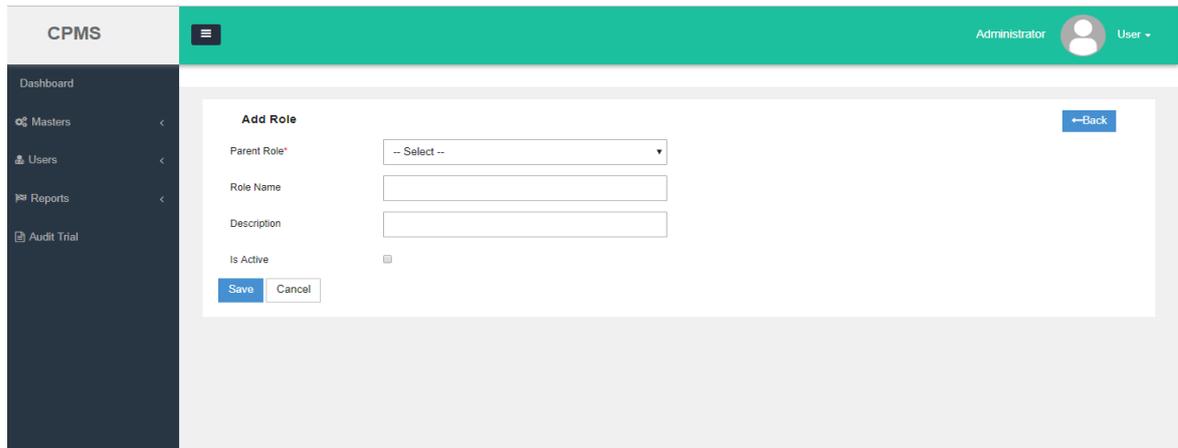


Fig 1.5

1.7 Collection & Submission of Pension Papers

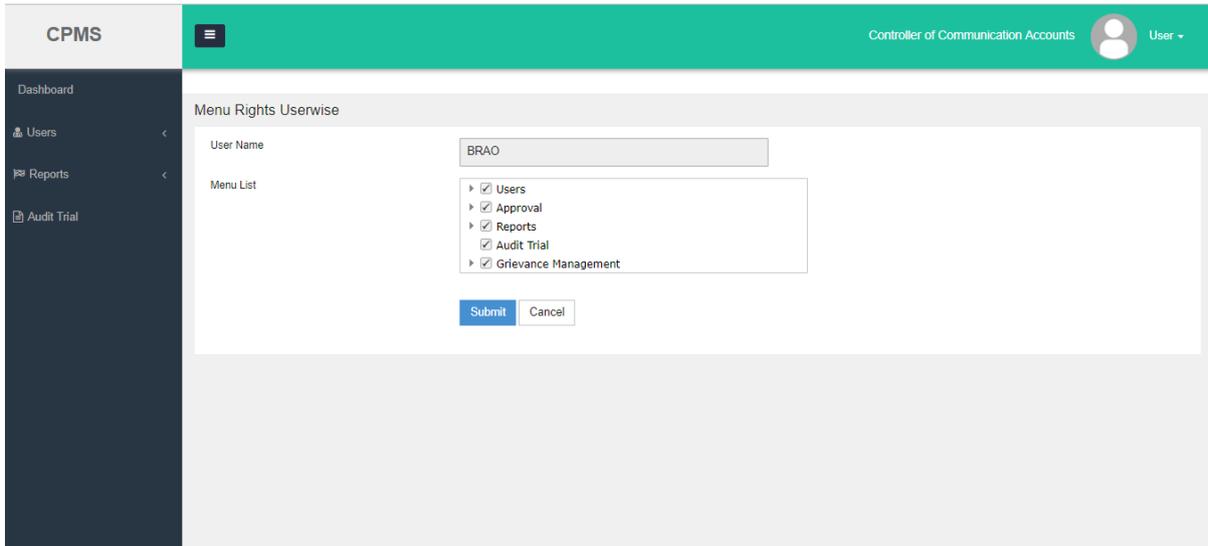
1.7.1 For BSNL and DoT offices

1.7.1.1 HoO Creation

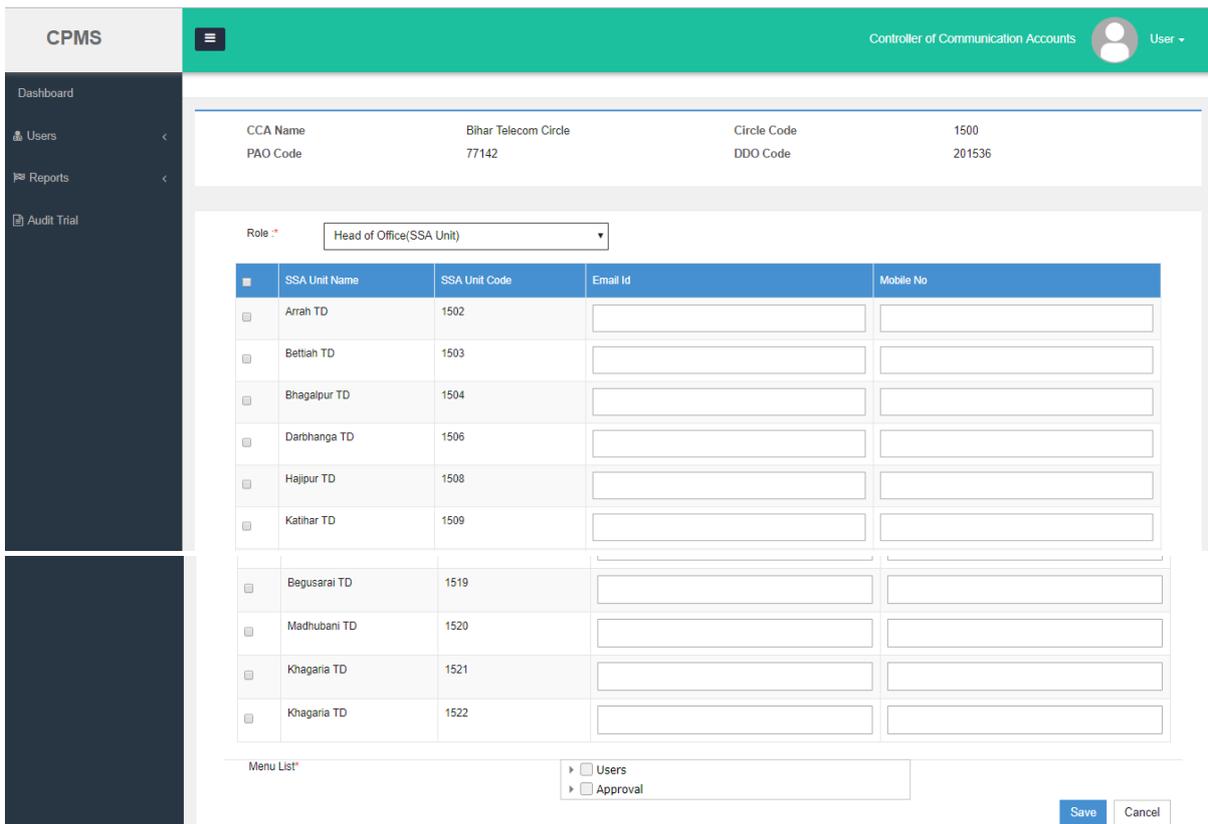
- a) CCA will create the login of HoO.
- b) HoO is the second level login after CCA.
- c) Path to create the HoO User Login: **Login as CCA → Users → User Registration (Select the Role Type as HoO, fill the user detail and save it).** (Fig 1.6 (A))
- d) For side channel (Telecom Circle) HoO creation, please refer Annexure 1.
- e) After creating the login, CCA will assign the authorization of modules to HoO by clicking on the Lock icon in the authorization column. (Fig 1.6 (i) (A))
- f) CCA will subsequently assign rights. (Fig. 1.6 (i)(A))
- g) CCA will enter/edit details of the HoO. (Fig 1.7 (A))

User Name	Name	Role	Mobile No	Email	Address	Authorization	Edit
bettiah@gmail.com	Amit Srivastava	HOO(SSA Unit)	9721362200	amithoney902@gmail.com		🔒	✎
Biharcircle@sc.com	BiharCircle SC	HOO(SSA Unit)	8964654654	biharcircle@gmail.com	1234, Street No. 90 chapra, Bihar	🔒	✎
biharpdaao	hemant Yadav	AO(Pension Distributing Authority)	9958638748	hemant@gmail.com	patna	🔒	✎
BRACAO	BR Ao	AO(Pension Section)	9712366548	bihar34@gmail.com	Bihar	🔒	✎
chaprahoo@gmail.com	Shankar kumar	HOO(SSA Unit)	9599721127	chaprahoo@gmail.com	bihar	🔒	✎
patnahoo@gmail.com		HOO(SSA Unit)	9541258233	patnahoo@gmail.com		🔒	✎
PSAO	Rajesh AO	AO(Pension Section)	7847854454	psao34@gmail.com	B-34, Bihar	🔒	✎
Raghav1	Raghav Sharma	AO(Pension Section)	9892378091	raghav@gmail.com	Chapra Bihar	🔒	✎

Fig 1.6 (A)



Assign Access Rights Fig 1.6 (i) (A)



Edit user details Fig 1.7 (A)

1.7.1.2 DH Creation

- a) DH is the third level login and subordinate to HoO.
- b) HoO will create the login for DH.

- c) Path to create the DH User Login: **Login as HoO → Users → User Registration (Select the Role Type as DH, fill the user detail and save it).** (Fig 1.8 (A) and 1.9 (A))
- d) After creating the login, HoO will assign the authorization of modules to DH by clicking on the Lock icon in the authorization column. Fig 1.9 (i) (A)

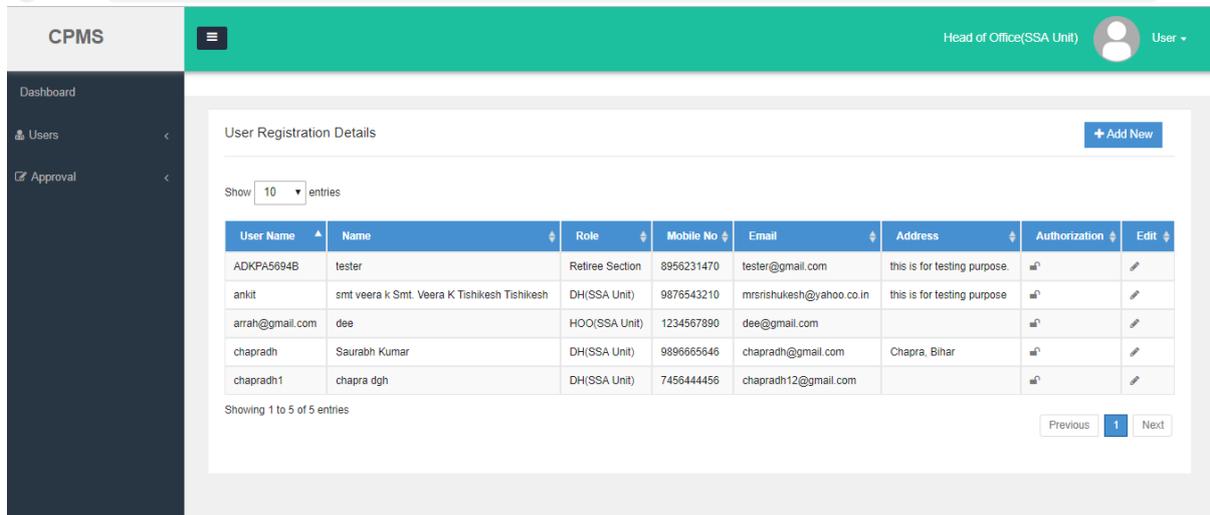
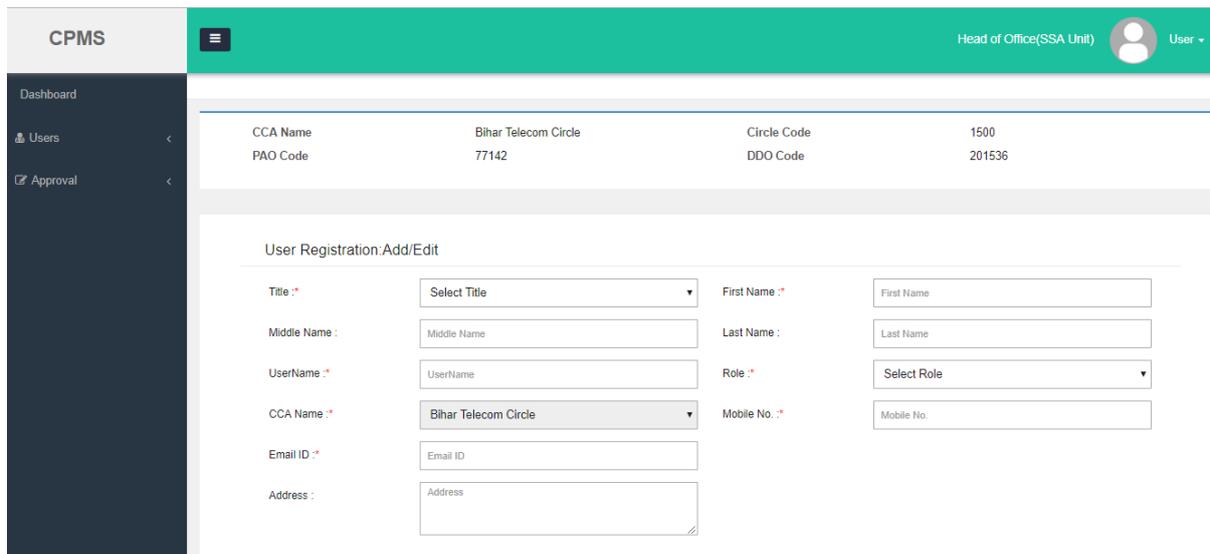


Fig 1.8 (A)



Edit user details Fig 1.9 (A)

Assign Access Rights Fig 1.9 (i) (A)

1.8 Processing and Sanction of Pension

1.8.1 AO Creation

- a) AO is the second level login and subordinate to CCA in Pension Section.
- b) CCA will create the login for AO to work in Pension Section.
- c) Path to create the AO User Login: **Login as CCA → Users → User Registration (Select the Role Type as AO, fill the user detail and save it). (Fig 1.10 and 1.11)**
- d) After creating the login, CCA will assign the authorization of modules to AO by clicking on Lock icon in the authorization column. Fig 1.11 (a)
- e) CCA will subsequently assign rights. (Fig 1.11 (a))
- f) Multiple AO Users can be created.

The screenshot shows the 'User Registration Details' page in the CPMS. The page header includes 'CPMS' and 'Controller of Communication Accounts' with a user profile icon. A sidebar on the left contains 'Dashboard', 'Users', 'Reports', and 'Audit Trail'. The main content area has a '+ Add New' button and a 'Show 10 entries' dropdown. Below is a table with columns: User Name, Name, Role, Mobile No, Email, Address, Authorization, and Edit.

User Name	Name	Role	Mobile No	Email	Address	Authorization	Edit
bettiah@gmail.com	Amit Srivastava	HOO(SSA Unit)	9721362200	amithoney902@gmail.com		🔒	✎
Biharcircle@sc.com	BiharCircle SC	HOO(SSA Unit)	8964654654	biharcircle@sc@gmail.com	1234, Street No. 90 chapra, Bihar	🔒	✎
biharpddao	hemant Yadav	AO(Pension Distributing Authority)	9958638748	hemant@gmail.com	patna	🔒	✎
BRAO	BR Ao	AO(Pension Section)	9712366548	bihar34@gmail.com	Bihar	🔒	✎
chaprahoo@gmail.com	Shankar kumar	HOO(SSA Unit)	9599721127	chaprahoo@gmail.com	bihar	🔒	✎
patnahoo@gmail.com		HOO(SSA Unit)	9541258233	patnahoo@gmail.com		🔒	✎
PSAO	Rajesh AO	AO(Pension Section)	7847854454	psao34@gmail.com	B-34, Bihar	🔒	✎
Raghav1	Raghav Sharma	AO(Pension Section)	9892378091	raghav@gmail.com	Chapra Bihar	🔒	✎

Fig 1.10

The screenshot shows the 'Edit user details' form in the CPMS. The page header includes 'CPMS' and 'Controller of Communication Accounts' with a user profile icon. A sidebar on the left contains 'Dashboard', 'Users', 'Reports', and 'Audit Trail'. The main content area shows user details: CCA Name (Bihar Telecom Circle), PAO Code (77142), Circle Code (1500), and DDO Code (201536). Below this is a form with fields for Role (Account Officer(Pension Section)), Title (Select Title), First Name, Middle Name, Last Name, Username, Role (Account Officer(Pension Section)), CCA Name (Bihar Telecom Circle), Mobile No., Email ID, and Address. There are 'Save' and 'Cancel' buttons at the bottom right.

Edit user details Fig 1.11

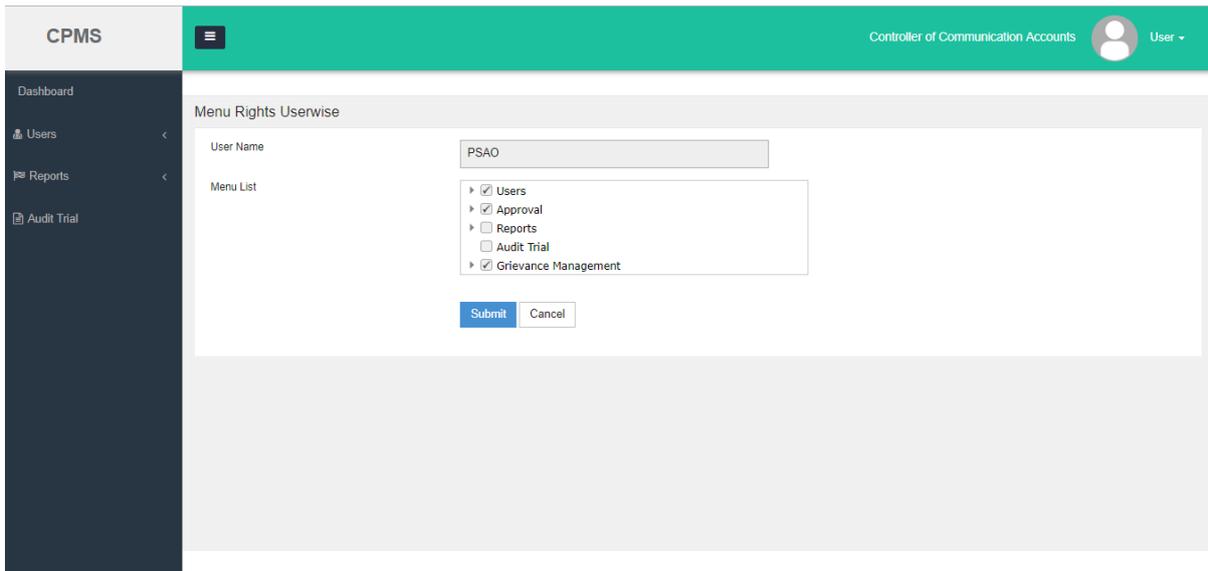


Fig 1.11 (a)

1.8.2 AAO Creation

- a) AAO is the third level login and subordinate to AO in Pension Section.
- b) AO will create the login for AAO to work in Pension Section. (Fig 1.12 and 1.13)
- c) Path to create the AAO User Login: **Login as AO** → **Users** → **User Registration (Select the Role Type as AAO, fill the user detail and save it).** (Fig 1.12 and 1.13)
- d) After creating the login, AO will assign the authorization of modules to AAO by clicking on Lock icon in the authorization column. Fig 1.13 (a)
- e) AO will subsequently assign rights. (Fig 1.13 (a))
- f) Multiple AAO Users can be created.

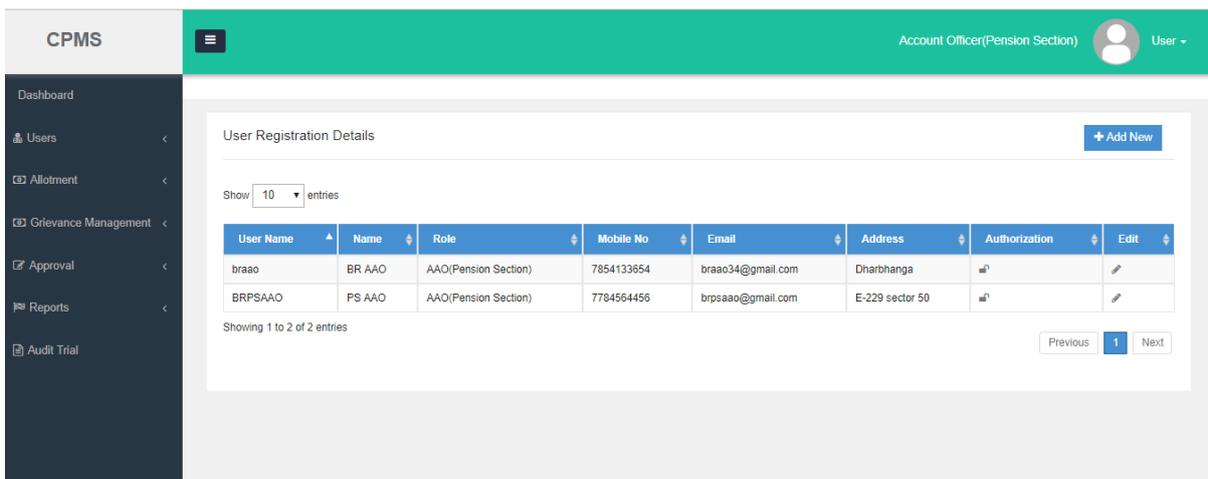


Fig 1.12

Edit user details (Fig 1.13)

Assign Access Rights Fig 1.13 (a)

1.8.3 DH Creation

- a) DH is the third level login and subordinate to AAO.
- b) AAO will create the login for DH.
- c) Path to create the DH User Login: **Login as AAO → Users → User Registration (Select the Role Type as DH, fill the user detail and save it). (Fig 1.14 and 1.15)**
- d) After creating the login, AAO will assign the authorization of modules to DH by clicking on Lock icon in the authorization column. Fig 1.15 (i)
- e) Multiple DH Users can be created.

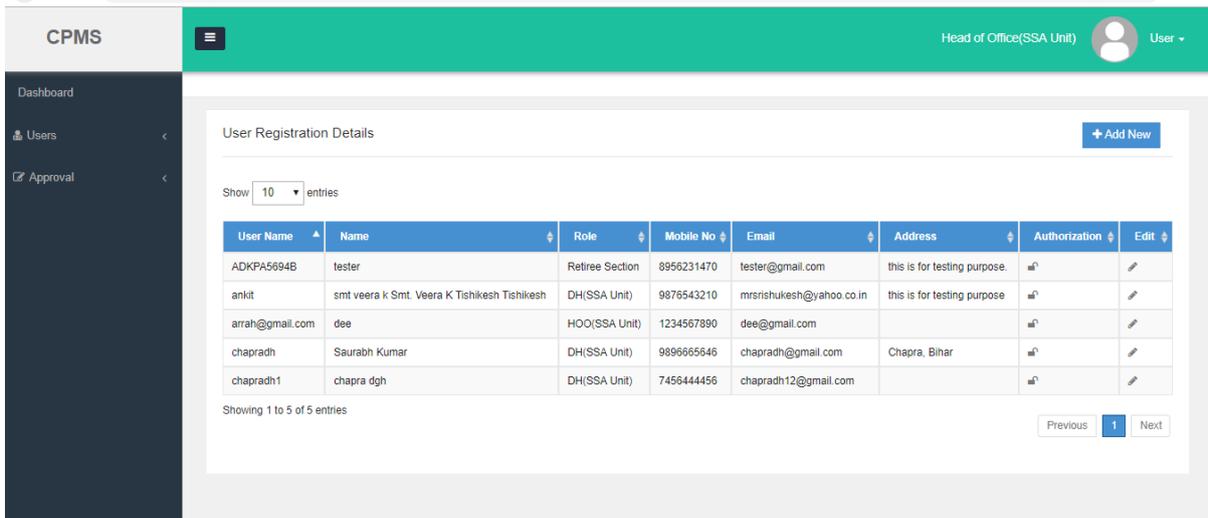
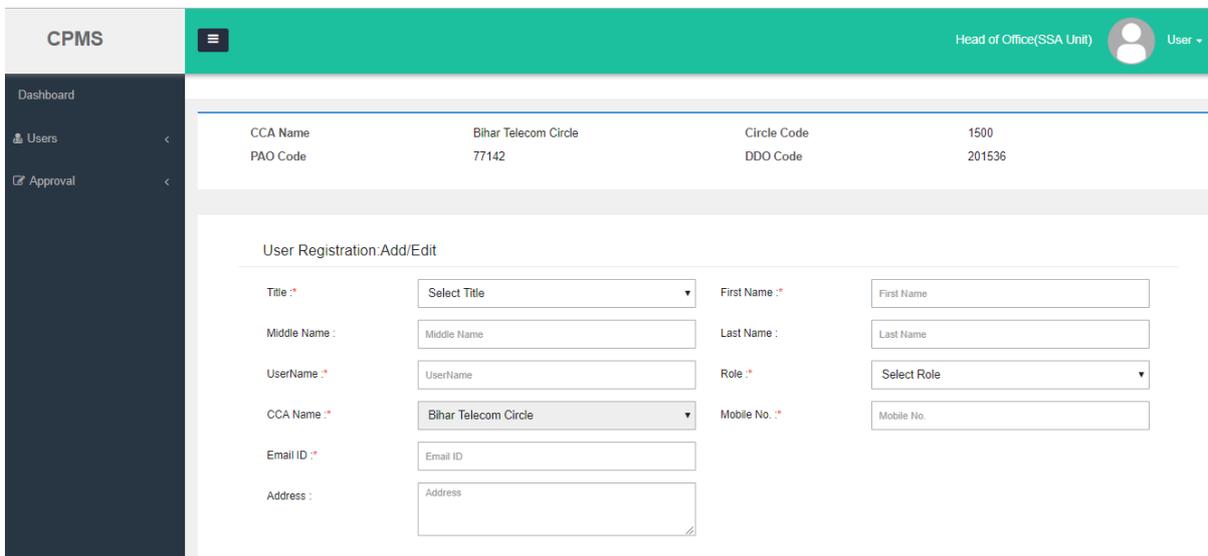
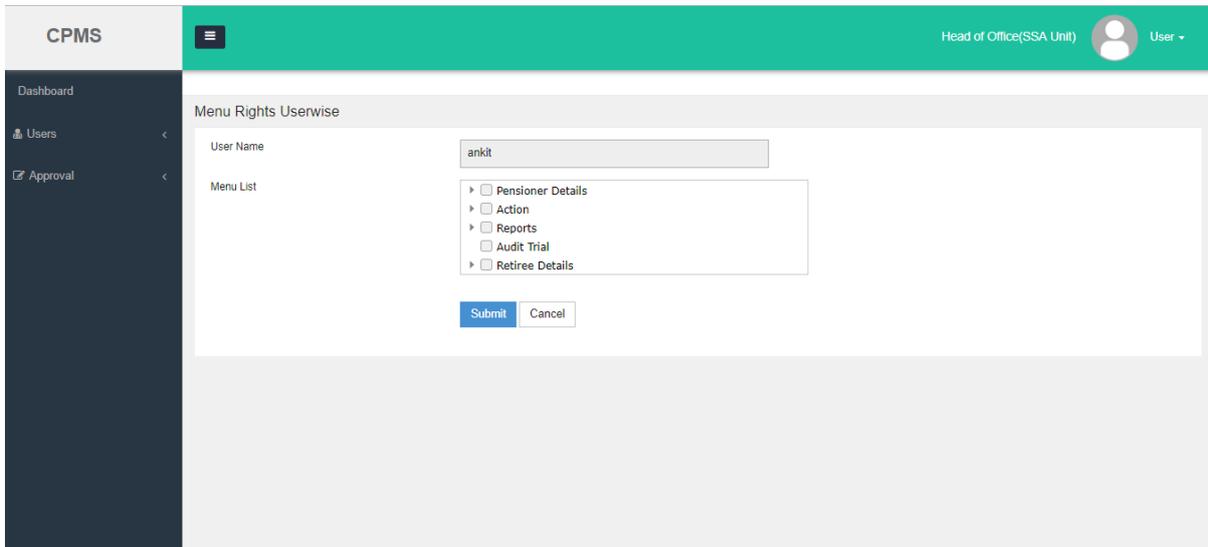


Fig 1.14



Edit user details Fig 1.15



Assign Access Rights Fig 1.15 (i)

1.9 Disbursement of Pensionary Benefits and Pension

1.9.1 AO Creation

- AO is the second level login and subordinate to CCA in Pension Disbursement Section.
- CCA will create the login for AO to work in Pension Disbursement Section.
- Path to create the AO User Login: **Login as CCA** → **Users** → **User Registration (Select the Role Type as AO, fill the user detail and save it).** (Fig 1.16 and 1.17)
- After creating the login, CCA will assign the authorization of modules to AO by clicking on Lock icon in the authorization column. Fig 1.17 (i)
- CCA will subsequently assign rights. (Fig 1.17 (i))
- Multiple AO Users can be created.

User Name	Name	Role	Mobile No	Email	Address	Authorization	Edit
bettiah@gmail.com	Amit Srivastava	HOO(SSA Unit)	9721362200	armthoney902@gmail.com		🔒	✎
BiharCircle@sc.com	BiharCircle SC	HOO(SSA Unit)	8964654654	biharcircle@sc.com	1234, Street No. 90 chapra, Bihar	🔒	✎
biharpdao	hemant Yadav	AO(Pension Distributing Authority)	9958638748	hemant@gmail.com	patna	🔒	✎
BR AO	BR Ao	AO(Pension Section)	9712366548	bihar34@gmail.com	Bihar	🔒	✎
chaprahoo@gmail.com	Shankar kumar	HOO(SSA Unit)	9599721127	chaprahoo@gmail.com	bihar	🔒	✎
patnahoo@gmail.com		HOO(SSA Unit)	9541258233	patnahoo@gmail.com		🔒	✎
PS AO	Rajesh AO	AO(Pension Section)	7847854454	psao34@gmail.com	B-34, Bihar	🔒	✎
Raghav1	Raghav Sharma	AO(Pension Section)	9892378091	raghav@gmail.com	Chapra Bihar	🔒	✎

Fig 1.16

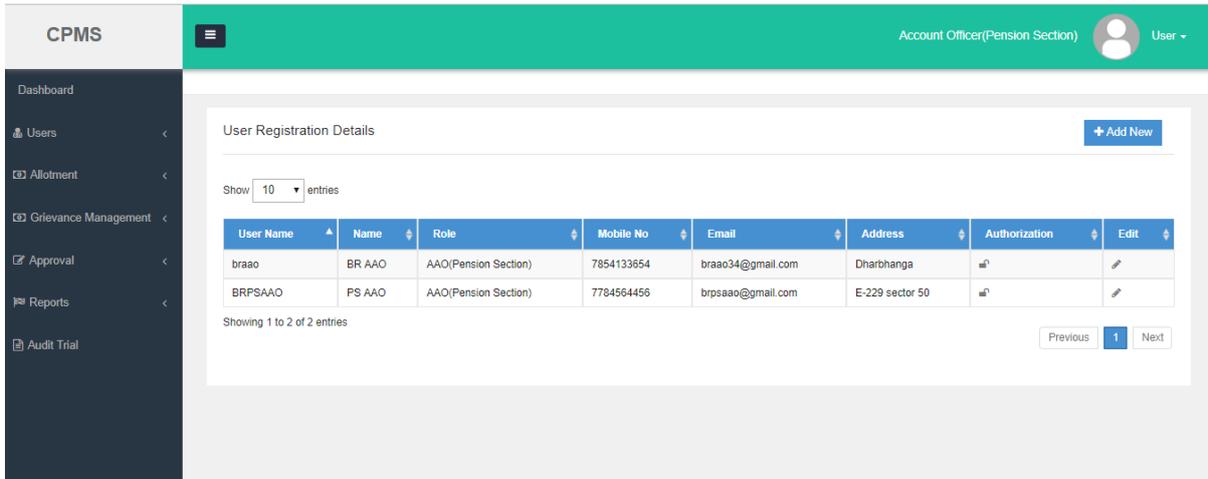
Edit user details Fig (1.17)

Assign Access Rights Fig 1.17 (i)

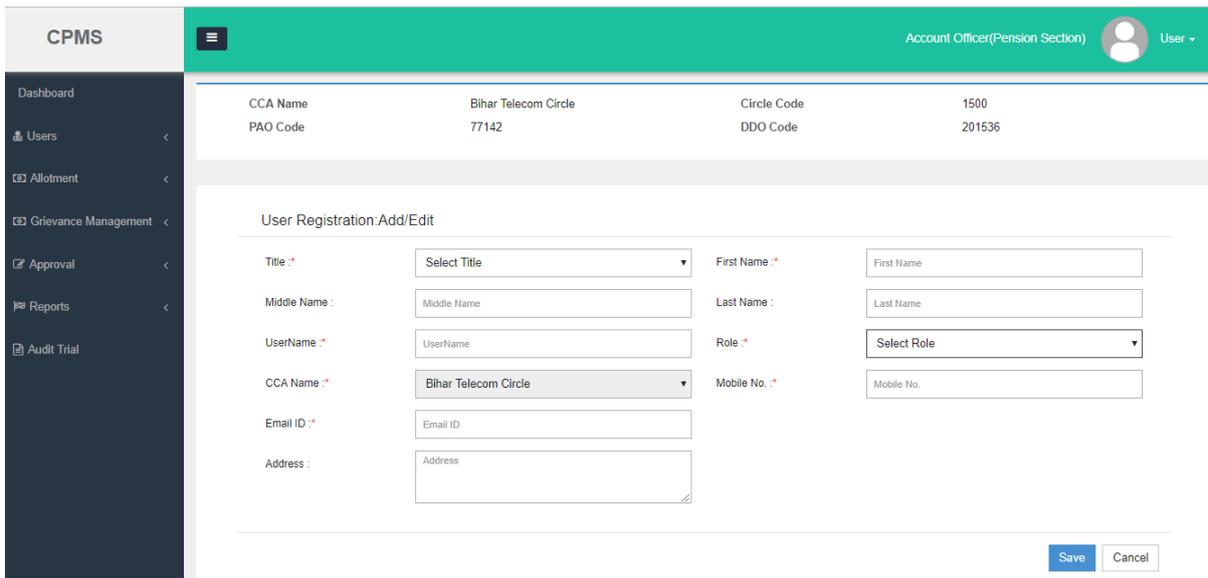
1.9.2 AAO Creation

- AAO is the third level login and subordinate to AO in Pension Disbursement Section.
- AO will create the login for AAO to work in Pension Disbursement Section. (Fig 1.18 and 1.19)
- Path to create the AAO User Login: **Login as AO → Users → User Registration (Select the Role Type as AAO, fill the user detail and save it).** (Fig 1.18 and 1.19)
- After creating the login, AO will assign the authorization of modules to AAO by clicking on Lock icon in the authorization column. Fig 1.19 (i)
- AO will subsequently assign rights. (Fig 1.19 (i))

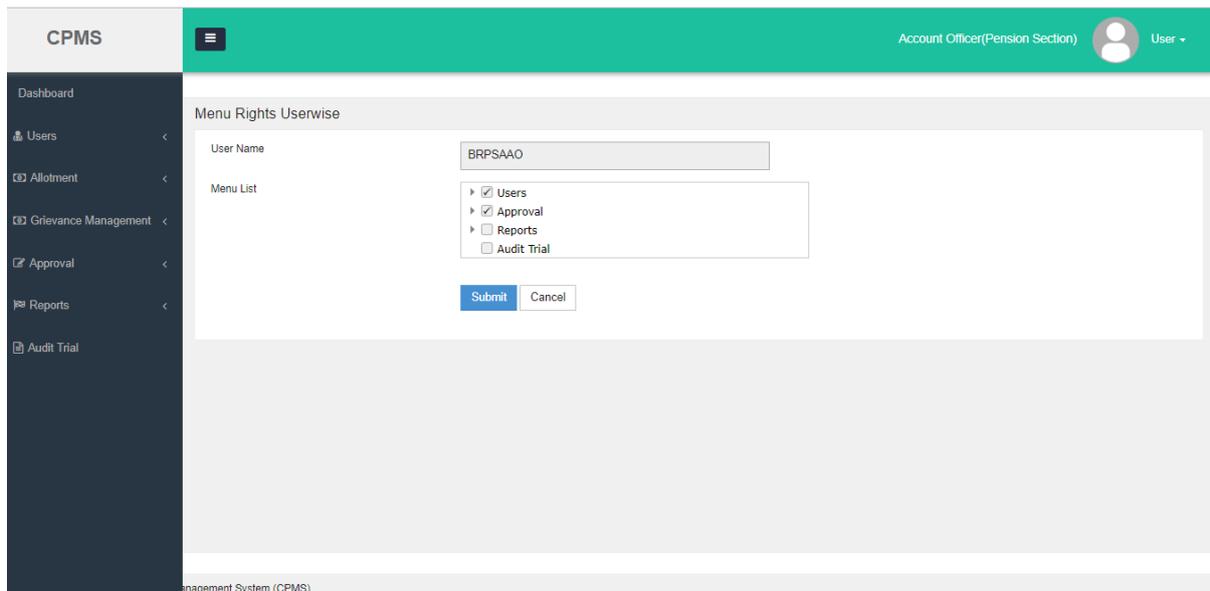
f) Multiple AAO Users can be created.



(Fig 1.18)



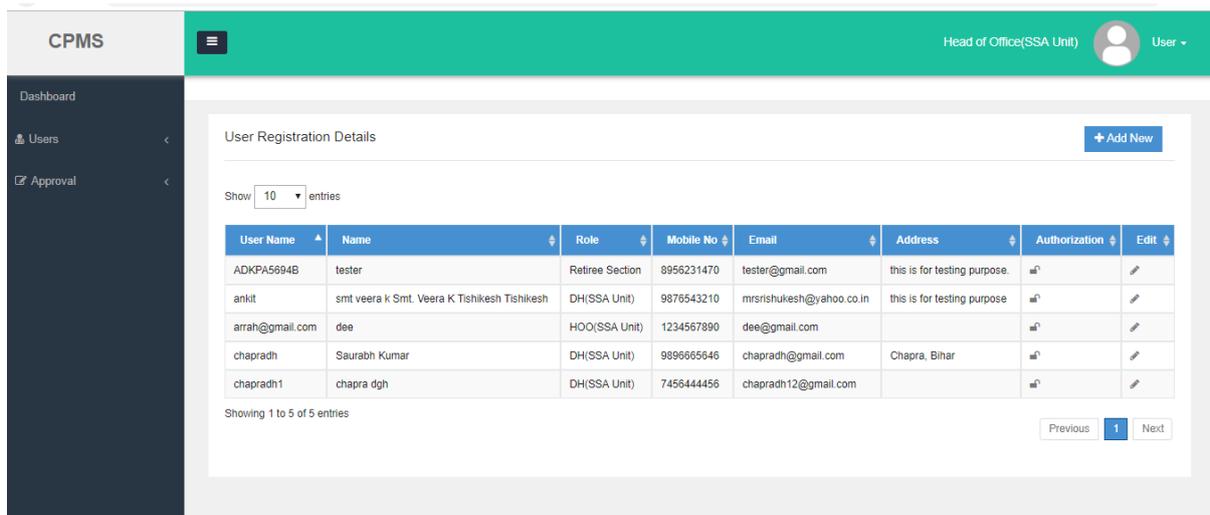
Edit user details (Fig 1.19)



Assign Access Rights Fig 1.19 (i)

1.9.3 DH Creation

- a) DH is the third level login and subordinate to AAO in Pension Disbursement Section.
- b) AAO will create the login for DH.
- c) Path to create the DH User Login: **Login as AAO → Users → User Registration (Select the Role Type as DH, fill the user detail and save it).** (Fig 1.20 and 1.21)
- d) After creating the login, AAO will assign the authorization of modules to DH by clicking on lock icon in authorization column. Fig 1.21 (i)
- e) Multiple DH Users can be created.



(Fig 1.20)

The screenshot shows the 'User Registration/Add/Edit' form in the CPMS interface. The form is divided into two columns. The left column contains fields for Title (a dropdown menu), Middle Name, Username, CCA Name (a dropdown menu showing 'Bihar Telecom Circle'), Email ID, and Address. The right column contains fields for First Name, Last Name, Role (a dropdown menu), and Mobile No. The CCA Name field is highlighted in grey. The form is titled 'User Registration:Add/Edit'.

Edit user details (Fig 1.21)

The screenshot shows the 'Menu Rights Userwise' form in the CPMS interface. The form has a 'User Name' field with the value 'ankit'. Below it is a 'Menu List' field containing a tree view of menu items: Pensioner Details, Action, Reports, Audit Trial, and Retiree Details. At the bottom of the form are 'Submit' and 'Cancel' buttons.

Assign Access Rights Fig (1.21) (i)

Important Points to Remember

- Administrator cannot create the login for any other User except CCA.
- CCA cannot create login for any other user except HoO, AO(Pen) and AO(PDA)
- HoO cannot create login for any other user except DH.
- AO cannot create login for any other user except AAO.
- AAO cannot create login for any other user except DH.
- In CPMS, each user is uniquely identified with a username, password, role and rights alongside other settings. The role and rights determine which tasks a user can perform, what data user can see, and how to perform the required activities using the available data.

Additional Key Points

1. On first login, all Users shall be prompted to update their profiles and change passwords.
2. In case of transfer of personnel or for any updating of profile information, the new details can be incorporated by writing to the Authority who created the user.
3. It is important that user creation is immediately followed by grant of authorisation rights, otherwise the user will find an empty screen.
4. CCA user must check the list of HoO available for creation. If he finds any error in name, it should be immediately brought to the notice of Administrator by writing to CPMS helpdesk support.cpms-dot@nic.in.

CHAPTER 2

2. HoO Unit

This chapter deals with flow of pension papers in the Head of Office (The term “HoO “is used for BSNL/ other DoT offices /Admin section in CCA offices.

2.1 Normal Pension Case

2.1.1 Creation of Retiree Profile

- DH to login to create the retiree profile.
- Select Retiree details on the Menu options available on the left pane.
- Click on “Add New” button at the right top corner of Retiree Profile page to get the form to fill.
- Enter the following information on retiree detail form (underlined parameters are the mandatory fields):
 - a. Title
 - b. First Name
 - c. Middle Name
 - d. Last Name
 - e. Type of Retirement
 - f. Height
 - g. Father’s/ Husband’s Name.
 - h. Mother’s Name
 - i. Date of Birth
 - j. Gender
 - k. Aadhaar Number
 - l. PAN Number
 - m. Mobile Number (This should be an Active Number)
 - n. Email ID
 - o. Identification Mark 1
 - p. Identification Mark 2
- Following details to be filled in other details section (All are mandatory fields):
 - a. Designation
 - b. Group
 - c. Date of Joining
 - d. Date of Retirement
 - e. Date of Superannuation
 - f. Govt. Accommodation provided by Directorate of Estates/BSNL at any time of service: YES/ NO (to select from the dropdown)

- g. Pay Commission (this should be the Pay Commission corresponding to the last pay drawn)

*After filling the aforementioned information, DH to click on Save button. By using the Clear button, User can also refresh the form and fill in fresh information. (Fig 2.1)

IMPORTANT:-Once this form is filled and next stage initiated it cannot be edited. Therefore, due diligence should be exercised while creating the Retiree Profile.

In case Wrong or incorrect profile is detected, please immediately inform the Helpdesk.

Fig 2.1

Creation of the Retiree Profile is the most important step in the process, so it should be ensured entries made therein are correct in all respects. After saving the information, **it is recommended** that a printout of the page be taken from the screen and Vetted by HoO level User before proceeding ahead in Service Verification. If any error is detected, then retiree profile be edited before initiating 2.1.2 (**Further updates in chapter 11**)

2.1.2 Service Book Verification (12M BDR)

- DH to re-check the form and send it for approval to HoO for service book verification.
- HoO to login and approve the service book verification. After HoO approves the form, the form will appear in 'Send Form to Retiree' tab.
- HoO can also return the form to DH in case any discrepancy is found. Then DH will have to again verify and send the form to HoO for approval. (Fig 2.2)
- **Before feeding Service Book information and updating, it has to be ensured that the Service Book is actually verified for the period mentioned. If any period remains unverified, please mention it in Remarks and keep a printout in the pension file. Service Book verification should be completed at the earliest.**
- **This activity has to be completed 12 months before date of retirement.**

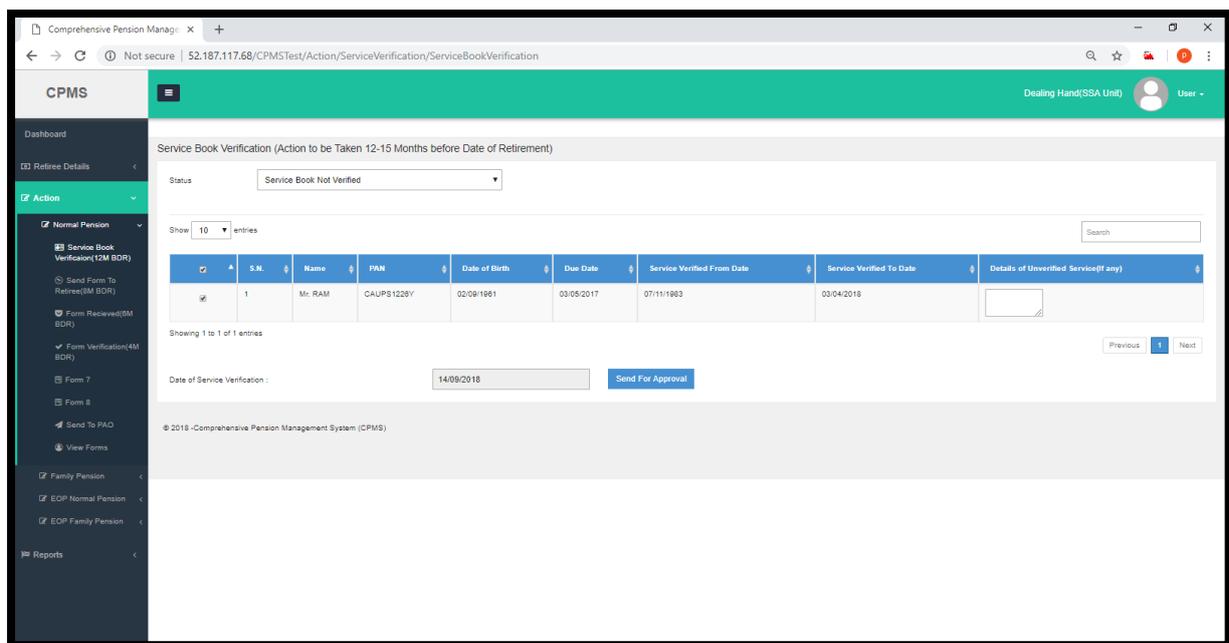


Fig 2.2

2.1.3 Send Form to Retiree (8M BDR)

- DH to send the form for approval to HoO. (Fig 2.3)
- HoO to login and approve the form. HoO can also return the form to DH by clicking on Return button in case any discrepancy has been found. (Fig 2.4)
- After the approval form HoO, form will be sent to Retiree to fill the required information.

- This activity has to be completed by 8 months before date of retirement.

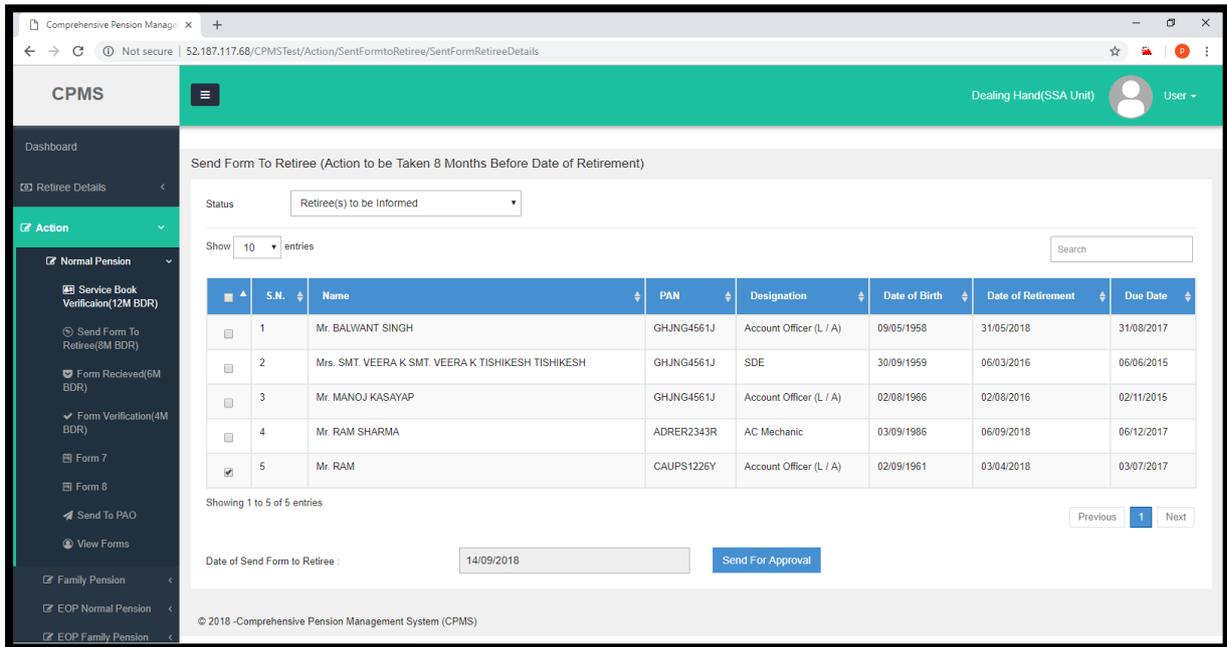


Fig 2.3

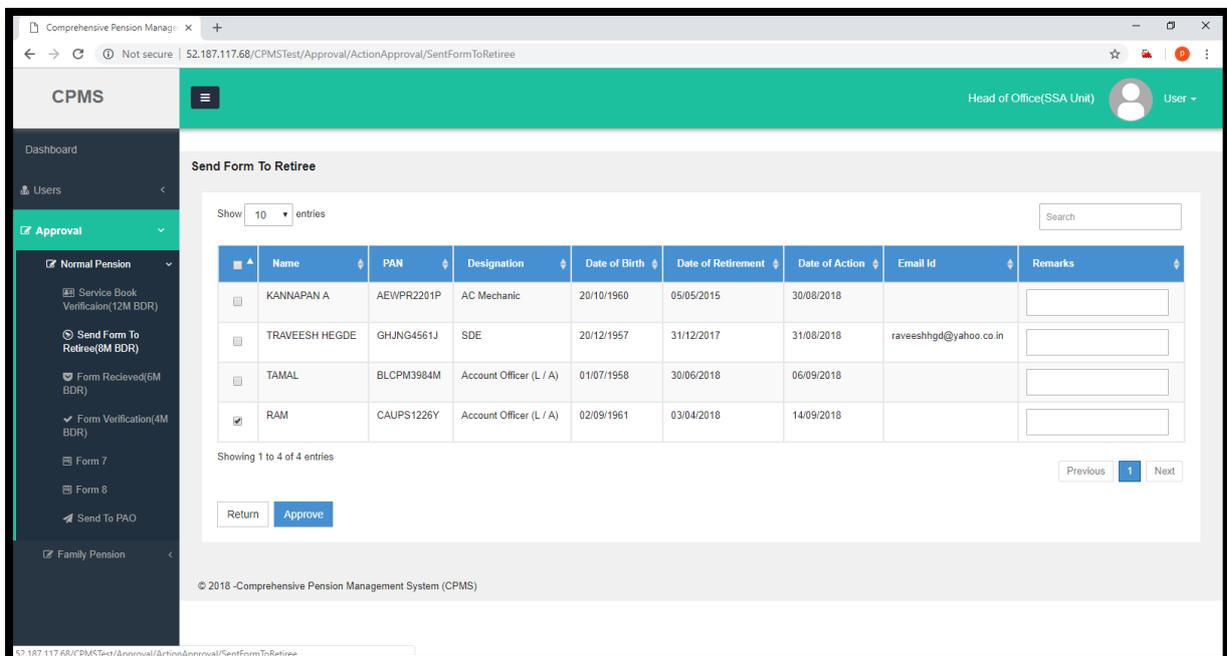


Fig 2.4

2.1.4 Form Received (6M BDR)

- DH to receive the form after retiree fills and submits the form from his/her end (Fig 2.5).
- DH to check that the form received is correctly filled and that all scanned documents uploaded are of good quality. Then on receipt of hard copy (duly signed by the Retiree), DH may cross verify the details and also check whether all enclosures (as per checklist) have been duly attached. Then DH shall send it to HoO.
- HoO to Approve/ Return the form as applicable. (Fig 2.6)
- If HoO approves the form, it will appear in 'Form Verification' tab of DH User. In case HoO returns the form, it goes back to DH for re-verification. **If now, any error is detected by DH, then file has to be returned to retiree with remarks. Retiree shall correct the error and resubmit the papers.**

Form Received (Action to be Taken 6 to 8 Months Before Date of Retirement)

Status: Cases Submitted without physical copy

Show 10 entries

	S.N.	Name	PAN	Designation	Date of Birth	Date of Retirement	Due Date	Forms	View Status	Return
<input checked="" type="checkbox"/>	1	Mr. RAM	CAUUPS126Y	Account Officer (L / A)	02/09/1961	03/04/2018	03/10/2017	Form1 FormA Form5 Form3 Profile Details Undertaking		

Showing 1 to 1 of 1 entries

Date of receipt of form in Physical : 14/09/2018 Send For Approval

© 2018 -Comprehensive Pension Management System (CPMS)

Fig 2.5

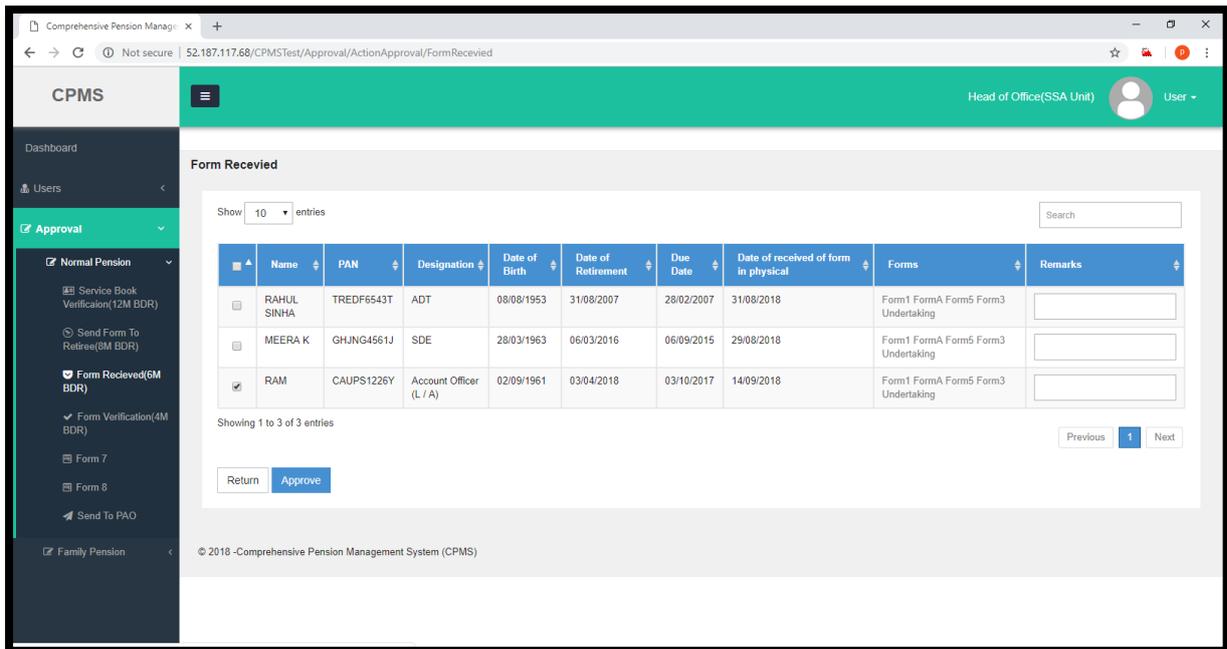


Fig 2.6

2.1.5 Form Verification (4M BDR)

- This process has been especially incorporated to put another check on correctness of the forms submitted by Retiree.
- DH to check and verify the form and send it for the approval to HoO by clicking on “Verify” Button (Fig 2.7)
- HoO to Approve/ Return the form as applicable. (Fig 2.8)
- If HoO approves the form, it will appear in ‘Form 7’ tab of DH. In case the HoO returns the form, it goes back to DH for re-verification.
- Simultaneously, the forms/papers will be countersigned by the competent authority in the physical file and process for preparation of Form 7 initiated.

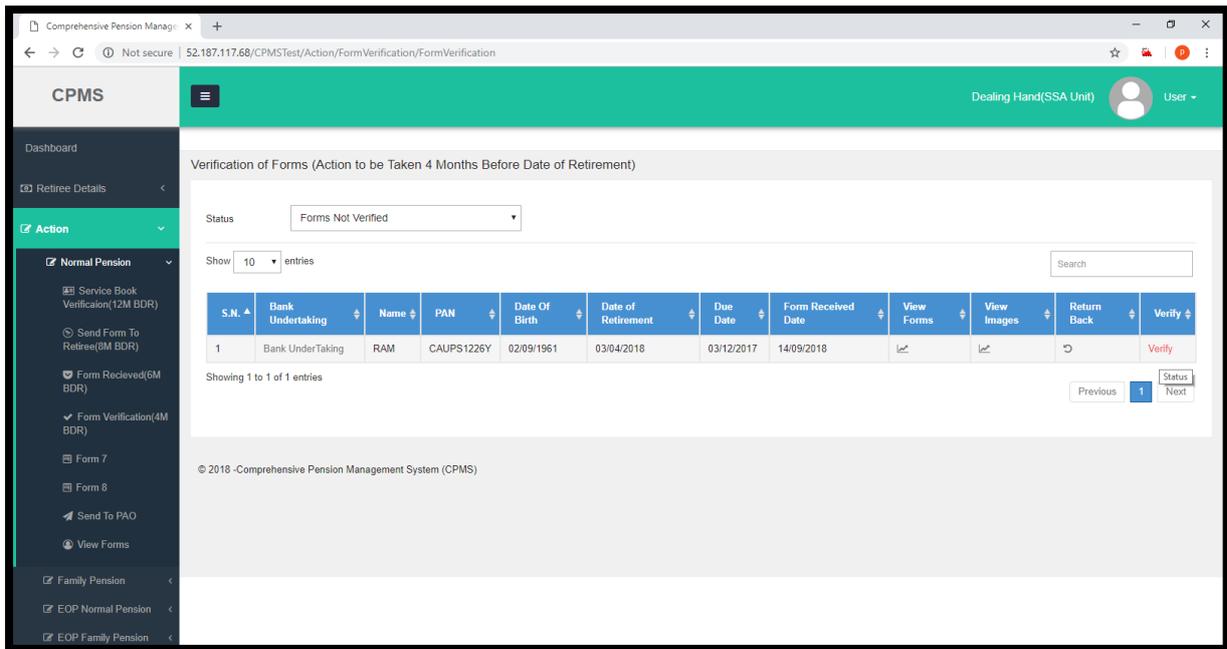


Fig2.7

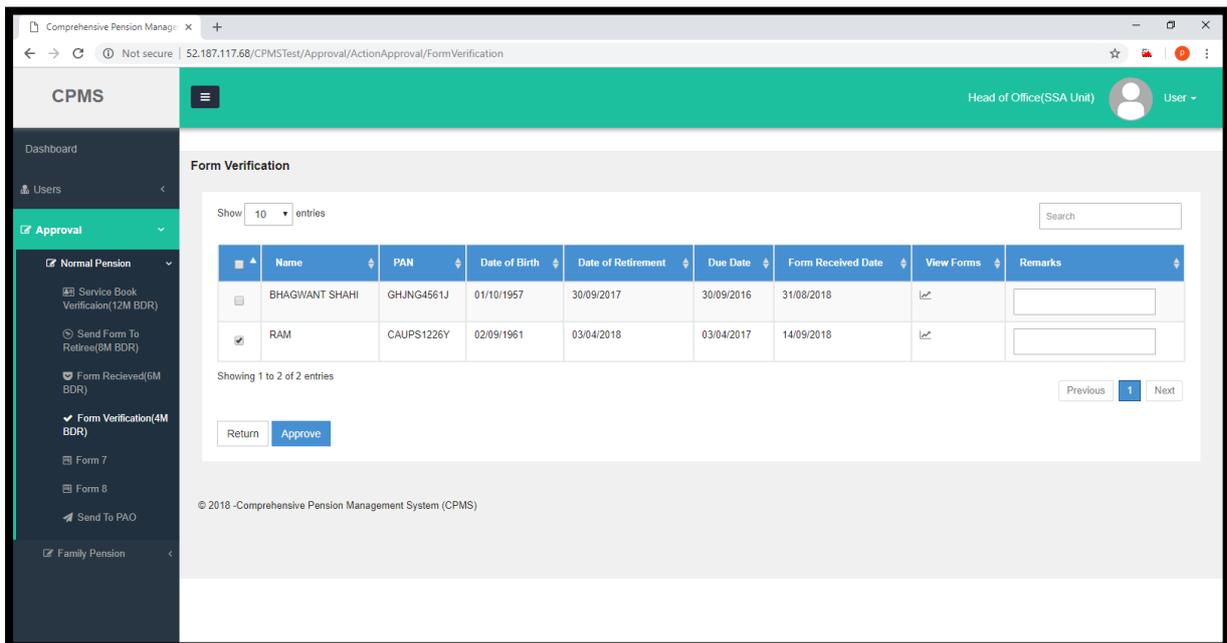


Fig 2.8

2.1.6 Form 7

- DH to verify and fill the required information in Form 7.
- Some information in Form 7 is auto populated. Others have to be entered. (Fig 2.9)
 - a) Name of the retiring Government Employee

- b) Father's/Husband's Name
- c) PAN NO.
- d) Height & Marks of identification
- e) Date of Birth
- f) Service to which he/she belongs (indicate name of Organised service, if any, otherwise say General Central Service)
- g) Particulars of post held at the time of retirement
- h) Name of the office
- i) Post held
- j) Scale of Pay/Pay Band & Grade pay of the post
- k) Basic Pay/Pay in the pay band & Grade pay.
- l) Basic Pay/Pay in the pay band & Grade pay
- m) Whether the appointment mentioned above was under Government or outside the Government on foreign service terms?
- n) If on foreign service, scale of pay/pay band, pay in the pay band and grade pay of the post in the parent department.
- o) Whether declared substantive in any Post under the Central Govt.?
- p) Date of beginning of service
- q) Date of ending service
- r) Cause of ending service
- s) In case of compulsory retirement, the orders of the competent authority whether pension may be allowed at full rates or at reduced rates and in case of reduced rates, the percentage at which it is to be allowed (Please See Rule 41)
- t) In case of removal/dismissal from service whether orders of the competent authority have been obtained for grant of compassionate allowance and if so, at what rate (Please see Rule 41)
- u) Particulars relating to military service, if any.
- v) Particulars relating to the service in autonomous body, if any.
- w) Whether any Departmental or judicial proceedings in terms of rule 9 of the CCS(Pension) Rules, 1972 are pending against the retiring employee. (If yes, in terms of Rule 69, provisional pension will be admissible and gratuity will be withheld till the conclusion of departmental or judicial proceedings and issue of final orders)
- x) Length of service
 - i. Details of omission, imperfection or deficiencies in the Service Book which have been ignored [under rules 59(1) (b) (ii)]
 - ii. Period not counting as qualifying service.
 - iii. Additions to qualifying Service.
 - iv. Whether any leave without pay.
 - v. Net Qualifying service.

- vi. Qualifying service expressed in terms of complete six monthly periods (Period of three months and above is to be treated as completed six monthly periods (Rule 49)
- y) Emoluments
 - a. Emoluments in terms of Rule 33.
 - b. Emoluments drawn during ten months pending retirement.
- z) Others: **Details of Govt. dues recoverable out of gratuity**
 - aa) Licence fee for Govt. accommodation see sub-rules (2), (3) and (4) of rule 2)
 - bb) Dues referred to in Rule 73
 - cc) Amount indicated by Directorate of Estates to be withheld under Sub rule(S) of Rule 72
 - dd) Post-retirement address of the retiree

Form 7		
<p>FORM 7 [SEE RULE 58, 60, 61(1)&(3) AND RULE 65(1)] FORM FOR ASSESSING PENSION/FAMILY PENSION AND GRATUITY [TO BE SENT SIX MONTHS BEFORE THE DATE OF RETIREMENT TO THE PAO]</p>		
PART - I		
1.	Name of the retiring Government Employee	Mr. RAKESH
2.	Father's/Husband's Name	FATHER
3.	PAN NO.	CDIPB8480L
4.	Height & Marks of Identification	Height : 180 cm & Identification : CUTINHAND
5.	Date of Birth	04/09/2018
6.	Service to which he/she belongs(indicate name of Organised service, if any, otherwise say General Central Service)	Central Govt/ BSNL
7.	Particulars of post held at the time of retirement	
	a. Name of the office	Delhi
	b. Post held	ACS & DGM (Legal)
	c. Scale of Pay/Pay Band & Grade pay of the post*	PB-1 (5200-20200)
	d. Basic Pay/Pay in the pay band & Grade pay	18000
	e. Whether the appointment mentioned above was under Government or outside the Government on foreign service terms?	Government
	f. If on foreign service, scale of pay/pay band, pay in the pay band and grade pay of the post in the parent department	N.A.
8.	Whether declared substantive in any Post under the Central Govt.? *	No
9.	Date of beginning of service	05/09/2018
10.	Date of ending service	16/09/2037
11.	Cause of ending service	Superannuation
12.	In case of compulsory retirement, the orders of the competent authority whether pension may be allowed at full rates or at reduced rates and in case of reduced rates, the percentage at which it is to be allowed (Please See Rule 41)	N.A.
13.	In case of removal/dismissal from service whether orders of the competent authority have been obtained for grant of compassionate allowance and if so, at what rate (Please see Rule 41)	N.A.
14.	Particulars relating to military service, if any	N.A.

15. Particulars relating to the service in autonomous body, if any

16. Whether any Departmental or judicial proceedings in terms of rule 9 of the CCS(Pension) Rules, 1972 are pending against the retiring employee. (If yes, in terms of Rule 69,provisional pension will be admissible and gratuity will be withheld till the conclusion of departmental or judicial proceedings and issue of final orders)

17. Length of service 05/09/2018 to 16/09/2037 19 YEARS 0 MONTHS 12 DAYS

a. Details of omission, imperfection or deficiencies in the Service Book which have been ignored [under rules 59(1) (b) (ii)]

b. Period not counting as qualifying service?

c. Additions to qualifying Service?

Whether any leave without pay ?

d. Net Qualifying service 05/09/2018 to 16/09/2037 19 YEARS 00 MONTHS 12 DAYS

e. Qualifying service expressed in terms of complete six monthly periods(Period of three months and above is to be treated as completed six monthly period (Rule 49) 38 SIX MONTHLY PERIOD

18. Emoluments

a. Emoluments in terms of Rule33

b. Emoluments drawn during ten months pending retirement :

Sl.No.	Pay Commission	Period From	Period To	Pay in Pay Band - Grade Pay/Level	Basic Rate	NPA Rate	(Basic+NPA) For Avg. Emoluments	+
1	7	01/12/2019	30/09/2020	Level-1 (18000-56900)	18000		180000	Delete

Others :

Details of Govt. dues recoverable out of gratuity

(i) Licence fee for Govt. accommodation see sub-rules (2),(3) and (4) of rule 2

(ii) Dues referred to in Rule 73

(iii) Amount indicated by Directorate of Estates to be withheld under subrule(S) of Rule 72

(iv) Post-retirement address of the retiree

Fig 2.9

- After the verification, DH will click on tab “Submit and Calculate” to calculate the pensionary benefits.
- DH will then send form 7 to HoO by clicking on **save calculation and submit**
- HoO will Approve/ Return the form.
- If HoO approves the form it will be processed further. In case of Return, form will be sent back to DH for reverification and the same process followed for approval.

IMPORTANT: -Form 7 calculates the pensionary benefits and pension as applicable to the pensioner. Once this form is filled and next stage initiated it cannot be edited in HoO section. Therefore, due diligence

should be exercised while filling in all important fields like Pay Band, Pay level, Qualifying/Non Qualifying service etc.

In case Wrong or incorrect information is saved in the system, please immediately inform the Helpdesk.

2.1.7 Form 8

- DH to verify and fill the minimum required information in Form 8. Some part of information is auto populated in Form 8. The details of recovery under various heads has to be filled up in this Form. It may be ensured that the total matches with the details filled in Form 7 (Fig 2.10).
- **If Nil recovery is due, then just click “Save and Send for Approval”.**
- HoO will approve/ Return the form.
- If HoO approves the form it will be processed further. In case of Return, Form will be sent back to DH for reverification and the same process followed for approval.
- The printouts of Form 7 and 8 can be taken from ‘View Forms’ tab. Approval of competent authority may be taken on the physical Form 7 and 8.

FORM 8 (Action to be Taken : 4 to 6 Months Before Date of Retirement)

Status:

Show entries

S.No.	Name	PAN	Designation	Date Of Birth	Date Of Retirement	Remarks	Current View	Form 8
1	Mr. UDAI SINGH	GHJNG4561J	MOTOR DRIVER	07-08-1958	31-08-2018	Reject	View	

Showing 1 to 1 of 1 entries

FORM 8
[SEE RULE 61 (1)]
[FORM OF LETTER TO THE ACCOUNTS OFFICER FORWARDING THE PENSION PAPERS OF A GOVERNMENT SERVANT]

1. Name :

2. Designation :

3. Date of Birth : 01/01/0001

4. Date of Retirement : 01/01/0001

5. Recovery Type :* Recovery Amount :*

[/iewForm8?id=62074&v=R#](#)

Recovery Type	Amount	Delete
Remarks (if any) <input type="text"/>		
		<input type="button" value="Save And Send For Approval"/> <input type="button" value="Clear"/>

Fig 2.10

Form 7 and Form 8 will be processed roughly four months before the date of retirement (Superannuation). HOO will again send the final papers like retirement order, LPC, No dues and Vigilance clearance. If there is any change in the pay etc. before retirement, then based on final papers received Form 7 shall be digitally revised in Pension section.

After processing the form 7 from DH level, if HoO user is satisfied then a printout may be taken and along with details of recovery which will be fed in form 8, approval and signature of competent authority may be taken. If any error is detected in the process, then HoO may return to DH the form 7 for necessary correction. DH shall correct it and send it to HoO user again. The approval of competent authority shall be taken. Afterwards, form 8 shall also be filled as already approved and approval taken.

2.1.8 Send to PAO

- **After all the aforementioned steps, DH will submit the form to Pension Section by clicking on “Send to PAO”. While sending this please ensure that all the documents mentioned in checklist are being sent. The papers may then be dispatched by post.**

2.1.9 View Forms

- All users' can view the list of all the retirees and their generated forms.
- Printout of Form7 and Form 8 can be taken by clicking on 'Print' and sent to Pension Section of concerned CCA office. (Fig 2.11)

Show 10 entries Search

S.N.	Name	PAN	View Forms
1	TAMAL KUMAR SINGH	XXXXXX432E	Form1 / FormA / Form5 / Form3 / Form7 / Form8 / View Profile / Undertaking / FMA
2	RAHUL SINHA	XXXXXX543T	Form1 / FormA / Form5 / Form3 / Form7 / Form8 / View Profile / Undertaking / FMA
3	VINOD CGFDHD	XXXXXX561J	Form1 / FormA / Form5 / Form3 / Form7 / Form8 / View profile / Undertaking / FMA
4	BALWANT SINGH	XXXXXX561J	Form1 / FormA / Form5 / Form3 / Form7 / Form8 / View profile / Undertaking / FMA
5	TRAVEESH HEGDE	XXXXXX561J	Form1 / FormA / Form5 / Form3 / Form7 / Form8 / View profile / Undertaking / FMA
6	RAJ KUMAR	XXXXXX561J	Form1 / FormA / Form5 / Form3 / Form7 / Form8 / View profile / Undertaking / FMA
7	RAGHUVENDRA SINGH	XXXXXX456T	Form1 / FormA / Form5 / Form3 / Form7 / Form8 / View profile / Undertaking / FMA
8	RISHABH SHARMA	XXXXXX470L	Form1 / FormA / Form5 / Form3 / Form7 / Form8 / View profile / Undertaking / FMA
9	SIDDARTH SHARMA	XXXXXX281B	Form1 / FormA / Form5 / Form3 / Form7 / Form8 / View Profile / Undertaking / FMA
10	RAKESH	XXXXXX480L	Form1 / FormA / Form5 / Form3 / Form7 / Form8 / View Profile / Undertaking / FMA

Showing 1 to 10 of 41 entries Previous 1 2 3 4 5 Next

Fig 2.11

2.2 Family Pension Case

2.2.1 Personal Detail

- DH to login and click on Action, then on Family Pension, then on Personal Details option in left pane(DH Login→Action→Family Pension→Personal Details)(Fig 2.13)
- Following information need to be entered on personal detail page:
 - a. Title
 - b. First Name
 - c. Middle Name
 - d. Last Name
 - e. Type of retirement.
 - f. Height
 - g. Father's/ Husband's Name.
 - h. Mothers Name
 - i. Date of Birth
 - j. Gender
 - k. Aadhaar Number
 - l. PAN Number
 - m. FP Mobile Number
 - n. FP Email ID
 - o. FP Identification Mark 1
 - p. FP Identification Mark 2
 - q. Employee Code

- r. Office
- Following details to be filled in Other Details section (All are mandatory fields):
 - a. Designation at the time of death
 - b. Group
 - c. Date of Joining
 - d. Date of Death
 - e. Date of Superannuation
 - f. Govt. Accommodation provided by Directorate of Estates/BSNL at any time of service: YES/ NO (to select from the dropdown)
 - g. Pay Commission

***After filling the aforementioned information, DH to click on Save button. Once filled the details cannot be changed so due diligence should be exercised before saving. (Fig 2.13)**

To expedite the disbursement of pensionary benefits, Family Pensioner should immediately be advised to submit the required information along with relevant documents to the HoO. Family Pensioners’ may also be advised to provide mobile phone number (mandatory) so that they can get updates on the pension process and pension disbursement.

The screenshot displays the CPMS interface. On the left is a navigation menu with 'Retiree Details' selected. The main content area is divided into two sections:

- Personal Detail Profile:** A form with multiple input fields and dropdown menus. The 'Type Of Retirement' dropdown is set to 'Death'. The 'Group' dropdown in the 'Retiree Other Details' section is also visible.
- Retiree Other Details:** A form containing fields for 'Designation at time of Death', 'Date of Joining', 'Date of Death', 'Group', 'Govt. Accommodation provided by Directorate of Estates at any time of service' (set to 'No'), and 'Pay Commission'.

At the bottom right of the form, there are 'Save' and 'Clear' buttons.

Fig 2.13

- After saving the details, an instance will be created in the Personal Details tab, as shown in the Fig 2.14.

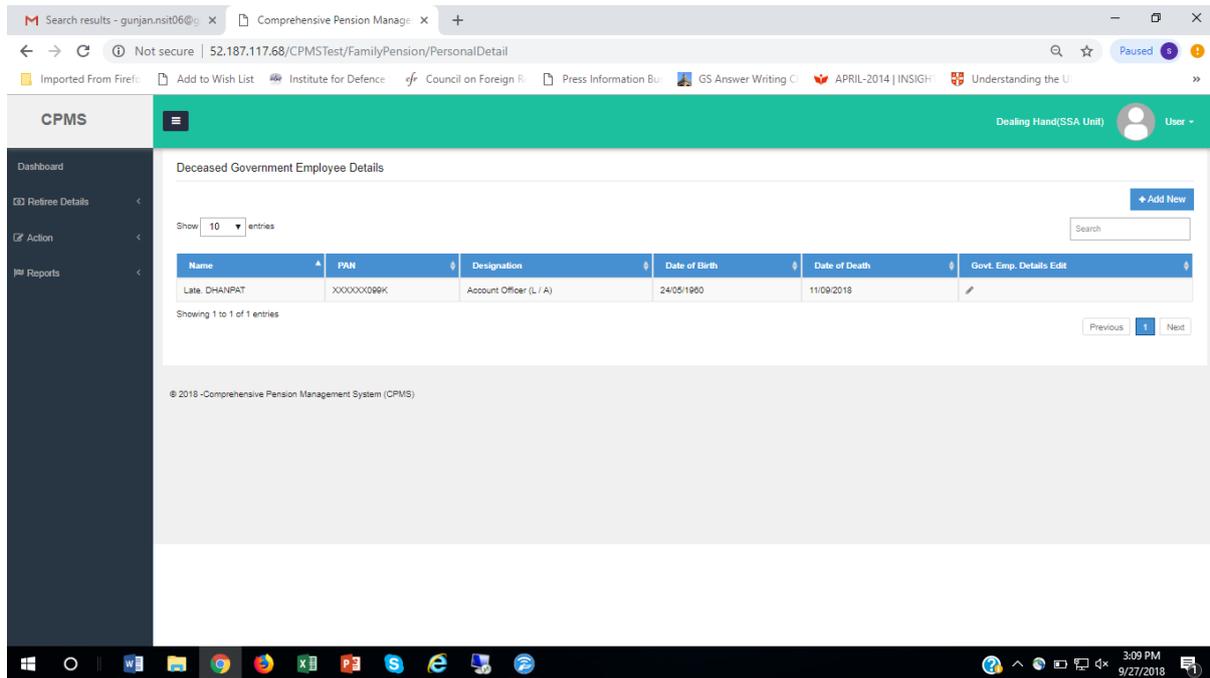


Fig 2.14

- Then DH has to click on **Govt. Emp Details edit** tab, and proceeds to the subsequent screen.
- The next screen will show three tabs viz. Personal details, Family Details and Nomination Form1 (Fig 2.15)

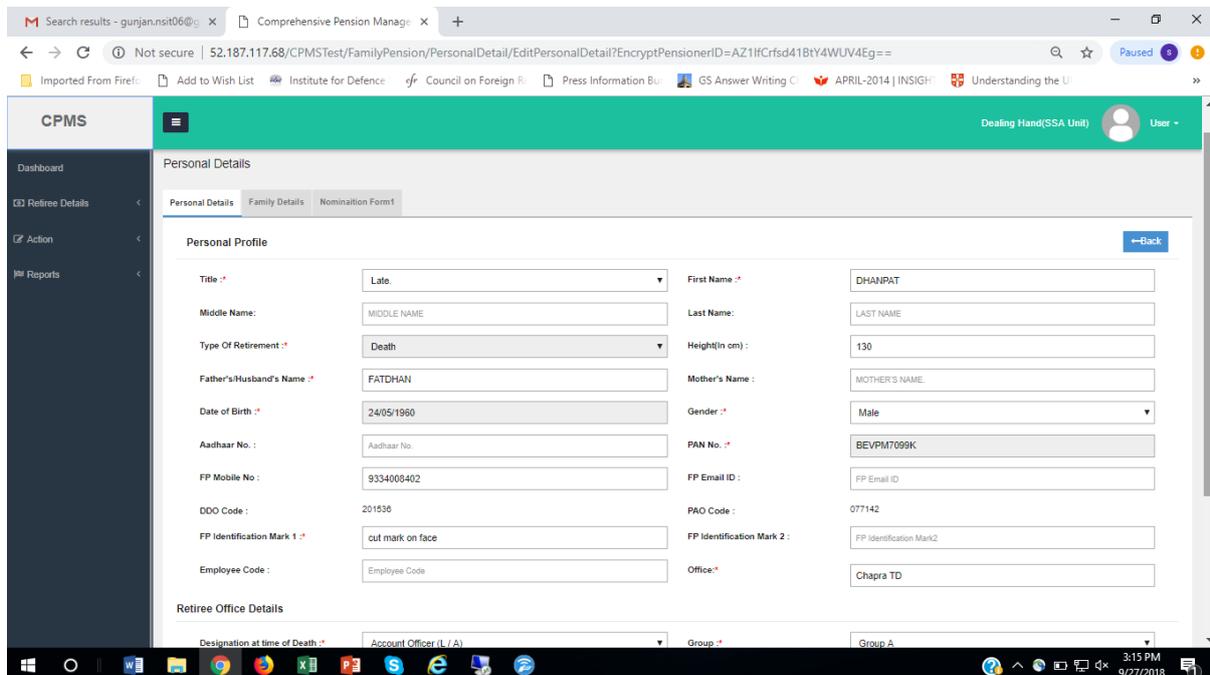


Fig 2.15

- Now the DH has to fill in details of Family and Nominations (Fig 2.16, Fig 2.17, Fig 2.18)

The screenshot shows the 'Family Details' form in the CPMS application. The form is divided into several sections with the following fields:

- Title**: Select (dropdown)
- First Name**: FIRST NAME (text input)
- Middle Name**: MIDDLE NAME (text input)
- Last Name**: LAST NAME (text input)
- Date of Birth**: Date of Birth (date picker)
- Relation With Govt. Servant**: Select (dropdown)
- Remarks (if any)**: Remarks (text area)
- Suffering From Disability**: Select (dropdown)
- Aadhaar No.**: Aadhaar No. (text input)
- Identification Mark (if any)**: Identification Mark (text input)
- Address**: Address (text input)
- Marital Status**: Select (dropdown)
- State**: Select (dropdown)
- District**: Select (dropdown)
- City**: City (text input)
- Pincode**: Pincode (text input)

At the bottom of the form, there is an 'Upload a file' button and a placeholder box labeled 'No Image Available'. A note below the upload button states: 'Upload scanned image of photograph : *Note: Size should not exceed 70 KB!! Only .JPEG, .JPG file is allowed.'

Fig 2.16

The screenshot shows the 'Pensioner Family Details' form in the CPMS application. The form is filled with the following data:

- Aadhaar No.**: [Empty]
- Address**: asdedf
- State**: BIHAR
- City**: griya
- Identification Mark (if any)**: [Empty]
- Marital Status**: Widow
- District**: GAYA
- Pincode**: 813105

At the bottom of the form, there is a 'Save' button and a 'Cancel' button. A note below the form states: '*Note: Married Sons & Daughters are also part of family.*'

Below the form is a table for 'Pensioner Family Details':

Name of the family member	Date of birth	Relation With Govt. Servant	Marital Status	Image	Edit/Delete

A 'Next' button is located at the bottom right of the table area.

Fig 2.17

Fig 2.18

- After filling all the details, the DH will submit the form by clicking submit button.

2.2.2 Service Verification (Family Pension case)

- DH to select ‘Service Verification’ tab from the Menu options.
- DH to check the form and send it for approval to HoO for service verification. Before this is done, physical service book verification needs to be done as well. Any unverified portion of the service book should be noted and attached in the file being sent to Pension Section (CCA Office). (Fig 2.14)
- HoO to login and approve the service book verification. HoO also to verify the service book physically.
- HoO can also return the form to DH in case any discrepancy is found. Then DH will again have to verify and send the form to HoO for approval.

Fig 2.14

2.2.3 Form 14

- DH to verify and fill the required information in Form 14. **DH may select the claimant who is eligible for pension.** This is to be done as per CCS Pension Rules,1972. The Form shows the claimant details, the bank details, the documents to be uploaded like photograph, signature and death certificate etc. The Bank Undertaking Form also needs to be uploaded duly signed by bank authorities as well the Family Pensioner. FMA option has to be chosen (if applicable and desired by the Family Pensioner) (Fig 2.15 (a), Fig 2.15 (b) and Fig 2.15 (c)).
- It should be seen that the photograph and signature are clear and visible.
- DH clicks on 'Form 12' tab.

The screenshot displays the CPMS interface for Form 14. The header includes 'CPMS' on the left, a menu icon, and 'Dealing Hand(SSA Unit) User' on the right. A sidebar on the left contains 'Dashboard', 'Retiree Details', and 'Action'. The main content area is titled 'Form 14' and features a search bar and a 'Show 10 entries' dropdown. Below this is a table with the following data:

Name	PAN	Designation	Date of Birth	Date of Death	Form 14	Form 12
Late ASHIS	XXXXXX	AAO	04/01/1970	25/11/2018	<input checked="" type="checkbox"/>	NA
Late ASHIS GHOSH	XXXXXX	AAO	04/01/1970	25/11/2018	<input checked="" type="checkbox"/>	NA
Late DHANPAT	XXXXXX999K	Account Officer (L / A)	24/05/1960	11/09/2018	<input checked="" type="checkbox"/>	NA
Late FAMILY PENSION TWO	XXXXXX	ADG	17/01/1985	15/02/2019	<input checked="" type="checkbox"/>	NA
Late FAMILY PENSION ONE	XXXXXX	ADG	17/01/1985	15/02/2019	<input type="checkbox"/> View Form 14	NA
Late GOPALA RAO	XXXXXX	ADG	18/09/1959	06/02/2019	<input checked="" type="checkbox"/>	NA
Late JJHHJGH	XXXXXX****	ACS & GM (Legal)	03/10/2001	03/10/2018	<input checked="" type="checkbox"/>	NA
Late KISHAN PAL	XXXXXX	TMECH	01/01/1960	07/10/2015	<input checked="" type="checkbox"/>	NA
Late IMANOJ	XXXXXX****	Accounts Officer (Regular)	03/02/1960	07/01/2019	<input checked="" type="checkbox"/>	NA
Late PINKOO MISHRA	XXXXXX	AO	05/03/1965	15/11/2018	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Showing 1 to 10 of 19 entries

© 2019 -Comprehensive Pension Management System (CPMS)

Work Sheet (Form 14)

Claimant Details Document Upload

Family Pension ←Back

Name of the Government servant : Ms. CHANDRAKALA A Designation at time of Death : AEP

Date of Death : 17/08/2018

Details of Claimant

Claimant Name : JAGANATHAN H Relationship with the deceased Government servant : Husband

Date of Birth :* 01/08/1990 Date of Re-Marriage :

Address :* Height (in cm.) :

State :* BIHAR District :* GAYA

City :* chapra Pincode :* 800012

Aadhaar No. : PAN No. :

Mobile No :* 9856565954 Email ID :

Identification Mark : Remarks :

Details of bank & post office in which family pension is to be credited:

Bank Post Office

IFSC Code :* Branch Name :*

Bank Name: Bank Account Number(Latest) :*

Type of Bank Account :*

Date on which obtain claim or claims from the claimants in the appropriate form for Death Gratuity and Family Pension as provided in rule 77 :*

Save

© 2018 -Comprehensive Pension Management System (CPMS)

Fig 2.15 (a)

The screenshot shows the 'Document Upload' section of the CPMS interface. At the top, there are tabs for 'Claimant Details', 'Document Upload', and 'FMA'. The 'Document Upload' tab is active. Below the title, there is a '← Back' button. The main area contains four upload fields, each with a label, a required field indicator (*), and an 'Upload a file' button:

- Claimant Photograph(Only jpeg and jpg) ***: Includes an 'Upload a file' button and a placeholder image box.
- Signature/Thumb of the Claimant/Guardian(Only jpeg and jpg) ***: Includes an 'Upload a file' button and a placeholder box with the text 'No Image Available'.
- Copy of Death Certificate of the deceased employee (pdf file only) ***: Includes an 'Upload a file' button.
- Bank Undertaking (pdf file only) ***: Includes a 'Print Bank Undertaking' button and an 'Upload a file' button.

A 'Save' button is located at the bottom right of the form.

Fig 2.15 (b)

The screenshot shows the 'Fixed Medical Allowance' section of the CPMS interface. At the top, there are tabs for 'Claimant Details', 'Document Upload', and 'FMA'. The 'FMA' tab is active. Below the title, there is a '← Back' button. The main area contains:

- A question: **Whether your residence after retirement is as an *** with two radio button options: CGHS Covered Area and Non-CGHS Area.
- A section titled **Fixed Medical Allowance Options *** containing a list of five options, each with a radio button:
 - I will be residing in non-CGHS area but would be availing CGHS facility for In-patient Department (IPD) and Out-patient Department (OPD) treatment. I will not be eligible for FMA
 - I will be residing in a non-CGHS area but would be availing CGHS facility for IPD treatment only by payment of CGHS contributions. I will also avail FMA for OPD treatment
 - I will be residing in a non-CGHS area and would not be availing CGHS facility for both IPD treatment and OPD treatment. I will avail I FMA
 - I will avail medical facilities available to spouse/family members who is an employees/pensioner of Government/PSU/ Autonomous Body. I will not avail CGHS facility and FMA
 - Avail medical facility of previous organization. I will not avail CGHS facility and FMA

A note at the bottom states: "Note: Pension forms will be generated automatically on filling the above information." A 'Save' button is located at the bottom right of the form.

Fig 2.15 (c)

IMPORTANT: -Form 14 prompts the user to enter bank details. The pension of the family pensioner will be credited into this account. Therefore, due diligence should be exercised while filling in all important fields like Bank Account no., IFSC code etc. After required, correct information is filled, Bank Undertaking has to be printed and physically signed by Bank authorities and Family Pensioner, and then uploaded on CPMS.

2.2.4 Form 12

- DH to verify and fill the required information in Form 12. For each claimant who has been nominated for gratuity in the nomination form filled earlier. Here DH has to click on the Edit button against the name of the nominee, and his/her details will be populated in the Form 12 (Fig 2.16).
- Again Bank Account details and claimant's details, signature needs to be uploaded.
- After updation of Form 12 and 14, the case will appear in 'Form 18' tab of DH.

The screenshot displays the 'Work Sheet (Form 12)' in the CPMS system. It features a sidebar on the left with 'Dashboard', 'Retiree Details', and 'Action' options. The main area shows a 'Nominee Details' table with the following data:

Name	Date of birth	Relation With Govt. Servant	Action
Mrs. KALPANA	18/02/1966	Wife	[Edit]

Below the table is the 'Family Pension' form. It includes the following fields and options:

- Name:** Mrs. KALPANA
- Date of Birth:** 18/02/1966
- Relationship with the deceased Government servant:** Wife
- Claimant Signature:** Includes an 'Upload a file' button and a note: 'Note: Size should not exceed 70 KB!! Only .JPG,.JPG file is allowed *'. A signature is visible in the field.
- Copy of Death Certificate of the deceased employee (Only pdf file) *:** Includes an 'Upload a file' button and a 'View' link.
- Details of bank & post office in which family pension is to be credited:**
 - IFSC Code *:** SBIN0006642
 - Branch Name *:** GHAZIABAD
 - Bank Name:** STATE BANK OF INDIA
 - Bank Account Number(Latest) *:** 10888765986
 - Type of Bank Account *:** Single

Fig 2.16

IMPORTANT: - Form 12 prompts the user to enter bank details. The DCRG of the family pensioner will be credited into this account. Therefore, due diligence should be exercised while filling in all important fields like Bank Account no., IFSC code etc. After required, correct information is filled, Bank Undertaking has to be printed and physically signed by Bank authorities and Family Pensioner, and then uploaded on CPMS. In case of claimant who is claimant for only Gratuity and not pension, only Mandate form, as generated, needs to be filled by the pensioner and uploaded in portal.

In case where there is no nomination, DCRG has to be divided in equal shares among the family members. Accordingly, the nomination form and Form 12s will be filled.

2.2.5 Form 18

- DH to verify and fill the required information in Form 18. Some information is auto populated in Form 18. DH should be careful while filling the important details like qualifying service, non-qualifying service period, last month's pay details etc. Pensionary benefits will be calculated on basis of these figures and hence figures must be cross-verified from service book. (Fig 2.17)
- DH will send Form 18 for approval of HoO.
- HoO will approve/ Return the form. HoO should verify the Pensionary benefit amounts. If the amounts are correct, he/she can approve it. If incorrect, HoO can return the case back to DH for rectification.
- If HoO approves the form it will be processed further. In case of Return, form will be sent back to DH for reverification and thereafter process followed for approval.

Form 18

WORKING SHEET (FORM 18)
[SEE RULES 78(1), 80(1), 80(3), 80 (5), 80-B (1) AND 80-B (5)]
FORM FOR ASSESSING AND AUTHORISING THE PAYMENT OF FAMILY PENSION
AND DEATH GRATUITY WHEN A GOVERNMENT SERVANT DIES WHILE IN SERVICE

1.	Name of the deceased government servant	Late. KUNAL
2.	Father's/Husband's Name	FKUNAL
3.	PAN NO.	ZUFKA75120
4.	Date of Birth	09/09/1980
5.	Date of Death	21/08/2018
6.	Service to which he/she belongs(indicate name of Organised service, if any, otherwise say General Central Service)	Central Govt/ BSNL ▼
7.	Particulars of post held at the time of death	
	a. Name of the office	Bihar
	b. Post held substantively	AAO
	c. Officiating Post	Officiating Post
	d. Scale of Pay/Pay Band & Grade pay of the post*	Select ▼
	e. Basic Pay/Pay in the pay band & Grade pay	
	f. Whether the appointment mentioned above was under Government or outside the Government on foreign service terms?	Government ▼
	g. If on foreign service, scale of pay/pay band, pay in the pay band and grade pay of the post in the parent department	N.A.
8.	Date of beginning of service	09/09/2003
9.	Cause of ending service	Death
10.	Particulars relating to military service, if any	N.A. ▼
11.	Particulars relating to the service in autonomous body, if any	No ▼
12.	Amount and nature of any pension/gratuity received for previous civil service, if any	Enter Amount
	a. Details of omission, imperfection or deficiencies in the Service Book which have been ignored [under rules 59(1) (b) (ii)]	
	b. Period not counting as qualifying service?	No ▼
	c. Additions to qualifying Service?	No ▼
	Whether any leave without pay ?	No ▼
	d. Net Qualifying service 09/09/2003 to 21/08/2018	
	e. Qualifying service expressed in terms of complete six monthly periods(Period of three months and above is to be treated as completed six monthly period (Rule 49)	30 HALF MONTHLY PERIOD
14.	Emoluments	
	a. Emoluments in terms of Rule33	No ▼
	b. Emoluments drawn during one month pending death :	

Sl.No.	Pay Commission	Period From	Period To	Pay in Pay Band - Grade Pay/Level	Basic Rate	NPA Rate	(Basic+NPA) For Avg. Emoluments	+
--------	----------------	-------------	-----------	-----------------------------------	------------	----------	---------------------------------	---

Others :

The date on which action initiated to -

a. The date on which intimation regarding the death of Government servant was received by the Head of Office

b. obtain the 'No demand certificate' from the Directorate of Estates as provided in rule 80-C (1).

c. assess the Government dues other than the dues pertaining to occupation of Government accommodation as provided in rule 80-C (2).

d. assess the service and emoluments qualifying for death gratuity and family pension as provided in rules 78 and 79.

Details of Govt. dues recoverable out of gratuity

(i) Licence fee for Govt. accommodation see sub-rules (2),(3) and (4) of rule 2

(ii) Dues referred to in Rule 73

(iii) Amount indicated by Directorate of Estates to be withheld under subrule(S) of Rule 72

Fig 2.17

- Form 18 and 19 to be put up in physical file for approval of competent authority.

IMPORTANT: -Form 18 calculates the pensionary benefits and pension as applicable to the Family pensioner. Once this form is filled and next stage initiated it cannot be edited in HoO section. Therefore, due diligence should be exercised while filling in all important fields like Pay Band, pay level, Qualifying/Non Qualifying service etc.

In case Wrong or incorrect information is saved in the system, please immediately inform the Helpdesk.

After processing the form 18 from DH level, if HoO user is satisfied then a printout may be taken and approval and signature of competent authority may be taken. If any error is detected in the process, then HOO may return to DH the form 18 for necessary correction. DH shall correct it and send it to HoO user. The approval of competent authority shall be taken.

2.2.6 Send to PAO

- **After all the aforementioned steps, DH will submit the form to Pension Section (CCA Office) by clicking on “Send to PAO”.**

2.2.7 View Forms

All users' can view the list of all the retirees and their generated forms. (Fig 2.18)

View Forms

Show entries

S.No. ▲	Deceased Govt. Emp. Name	PAN	Date of Death	View Forms
1	Late. SURESH KUMAR SINGH	XXXXXX654R	29/08/2013	Form14 / Form12 / Form18/ Form19/ Undertaking FMA /
2	Late. CHANDRAKALA R	XXXXXX174C	30/05/2018	Form14 / Form12 / Form18 / Form19 / Undertaking FMA /
3	Late. ABHISHEK SINGH	XXXXXX561J	31/08/2014	Form14 / Form12 / Form18/ Form19/ Undertaking FMA /
4	Late. RATANAKAR	XXXXXX561J	15/08/2018	Form14 / Form12 / Form18/ Form19/ Undertaking / FMA
5	Late. RAM PRASAD	XXXXXX561J	22/08/2018	Form14 / Form12 / Form18/ Form19/ Undertaking / FMA
6	Late. RAGHAV SHARMA	XXXXXX561J	28/08/2018	Form14 / Form12 / Form18 / Form19 / Undertaking / FMA /
7	Late. AMIT ROY	XXXXXX561J	30/08/2018	Form14 / Form12 / Form18/ Form19/ Undertaking FMA /
8	Late. KUNAL	XXXXXX512O	21/08/2018	Form14 / Form12 / Form18 / Form19 / Undertaking FMA /
9	Late. ABC SHARMA	XXXXXX456J	10/09/2018	Form14 / Form12 / Form18 / Form19 / Undertaking FMA /
10	Late. DEEPAK KUMAR	XXXXXX793J	01/09/2016	Form14 / Form12 / Form18 / Form19 / Undertaking / FMA

Showing 1 to 10 of 12 entries

Previous Next

Fig 2.18

CHAPTER 3

3. Pension Sanctioning Section.

This chapter deals with pension case flow in the Pension Sanctioning Section of the CCA office.

3.1 Allotment of Pension Case to DH

- The pension case coming from HoO will appear in 'Allotment' tab of the Accounts Officer (AO) of the Pension Sanctioning Section. AO pension sanctioning section will allot the case to the Dealing Hand of the section. (Fig 3.1)
- **The current practice based on which cases are allotted to DH by AOs may be continued. This will be done by the AO who has been authorized to allot the case (It is to be noted that only 1 AO is authorised for allotment).**

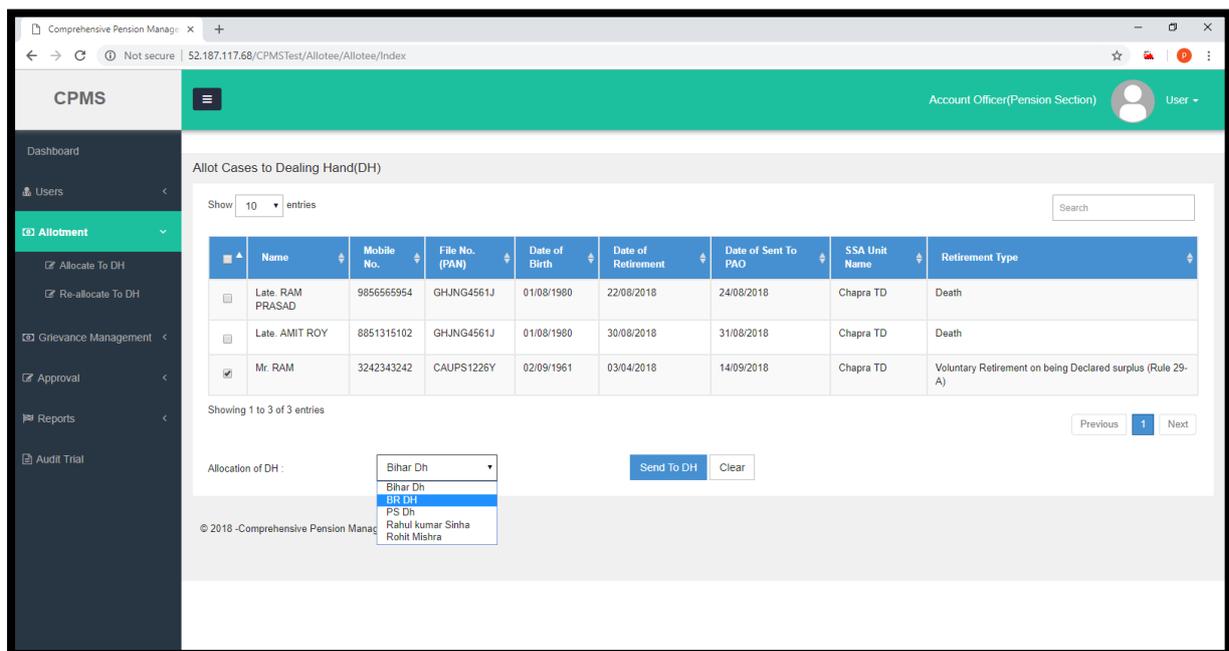


Fig 3.1

3.2 Form Received

- DH (Pension Sanctioning Section) will receive the case allotted by AO (**Action->Pension Section->Form Received**).
- DH (Pension Sanctioning Section) will select on the particular pension case, and click on **Receive Form** tab (Fig 3.2).

- DH (Pension Sanctioning Section) will then select the forms submitted by the HoO/ACCA. DH will then enter the actual date of receipt of physical forms and other documents. DH will then save the case (Fig 3.3).
- **A physical file has to be opened by the DH upon receipt of forms and documents by the DH.**

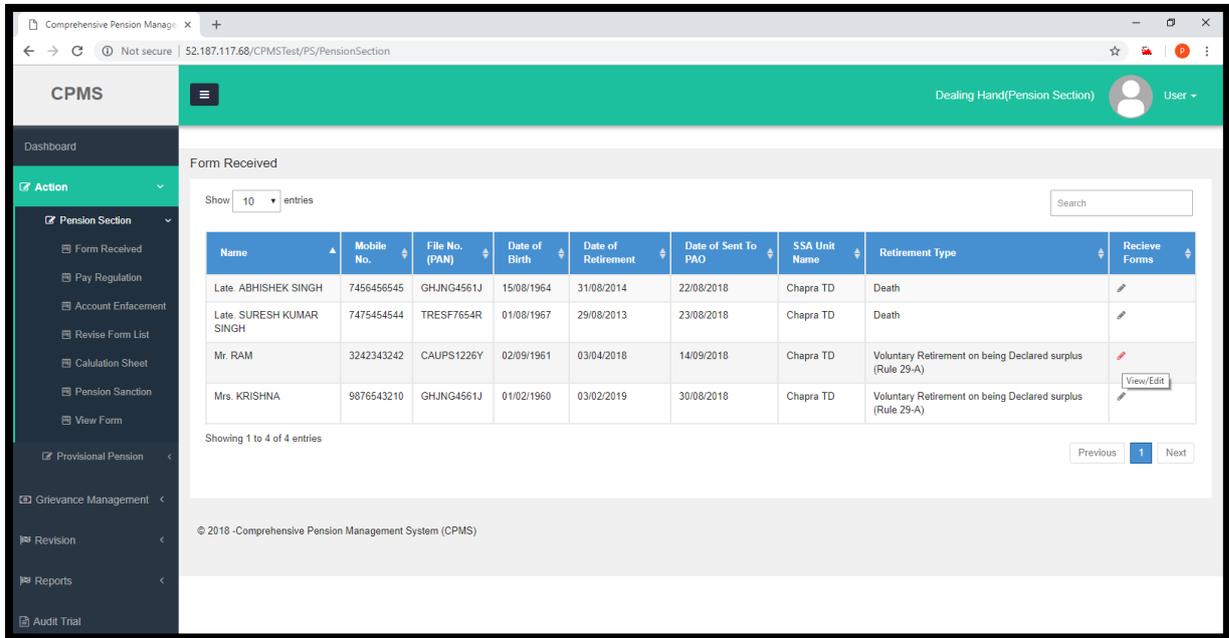


Fig 3.2

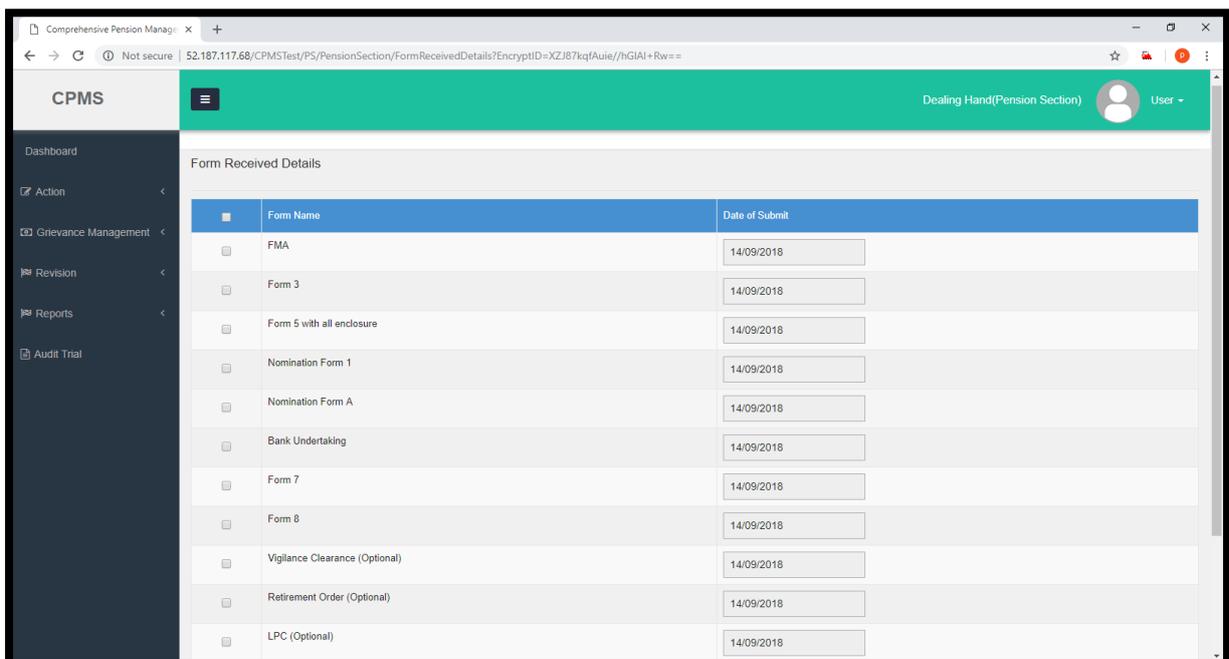


Fig 3.3

3.3 Pay Regulation

- The case will now flow into the 'Pay Regulation' tab of DH (Pension Sanctioning Section) level (**Action->Pension Section->Pay Regulation**).
- DH (Pension Sanctioning Section) will select the case and click on Pay Regulation Sheet (Fig 3.4).
- DH (Pension Sanctioning Section) will then add Pay Scale Data for the particular pension case and save the same.

The screenshot displays the 'Pay Regulation' section of the CPMS web application. The interface includes a sidebar menu with options like 'Dashboard', 'Action', 'Pension Section', and 'Provisional Pension'. The main content area shows a table with the following data:

Name	Mobile No.	File No. (PAN)	Date of Birth	Date of Retirement	Pay Regulation Sheet
Mr. RAM	3242343242	CAUPS1226Y	02/09/1961	03/04/2018	
Mr. THAKUR PRASAD MAURYA	9810586642	AIGPK6446C	01/08/1958	31/07/2018	Edit

Below the table, it indicates 'Showing 1 to 2 of 2 entries' and provides navigation buttons for 'Previous', '1', and 'Next'. The footer of the page reads '© 2018 -Comprehensive Pension Management System (CPMS)'.

Fig 3.4

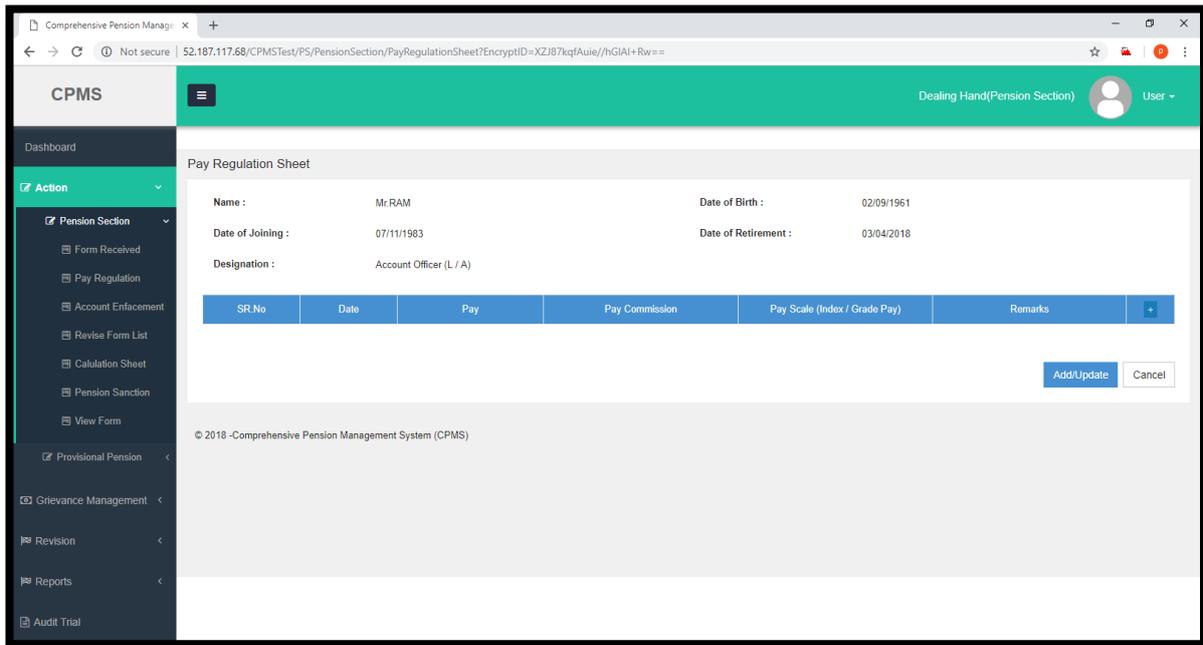


Fig 3.5 (a)

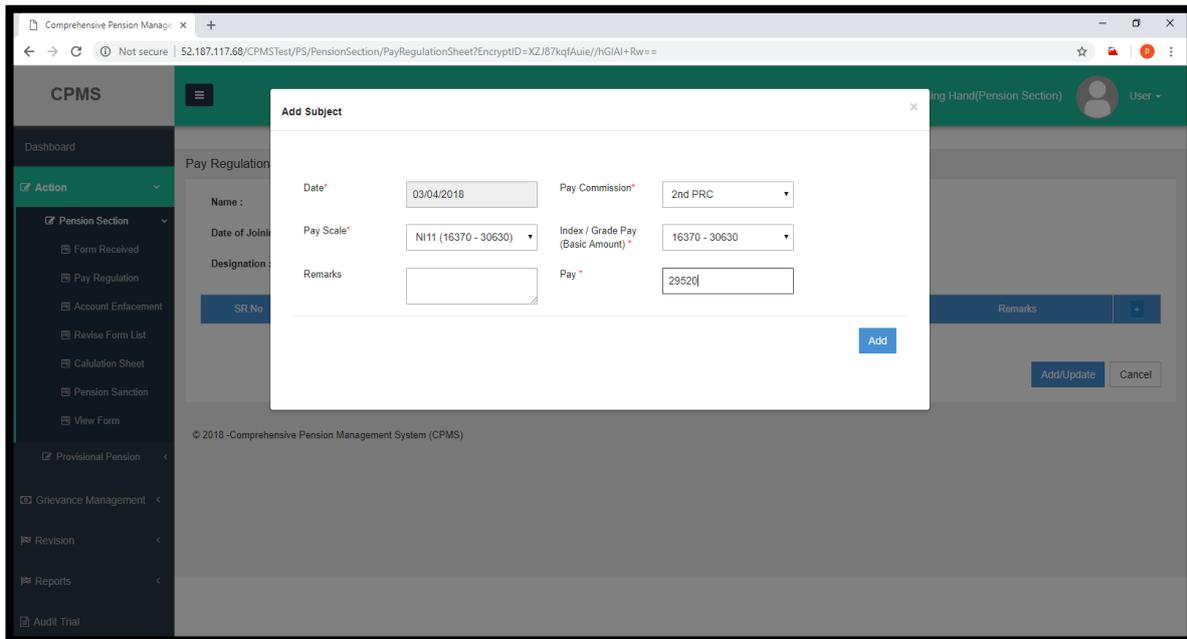


Fig 3.5 (b)

3.4 Account Enfacement

- The above case will now flow into Account Enfacement (AE) at DH (Pension Sanctioning Section) level (**Action->Pension Section->Account Enfacement**).

- The DH (Pension Sanctioning Section) will then select the particular pension case. The DH (Pension Sanctioning Section) can edit the Pay Details by clicking on ‘Pay Regulation’ tab, if the same was not correctly done in 3.3 above.
- DH (Pension Sanctioning Section) shall analyse if the case is fit for finalisation of pension or not. If some documents have not been received, then he/she will generate AE by clicking on ‘Generate AE’ tab. **The same shall be put up for approval of competent authority along with pay regulation sheet.**
- The Approved AE shall be uploaded by in the software.
- The physical copy of the AE will be sent by mail/dak to concerned HoO. Reminders can be sent using facility for regenerating AE. However, when necessary papers have been received, the ‘Resolve AE’ tab may be clicked.

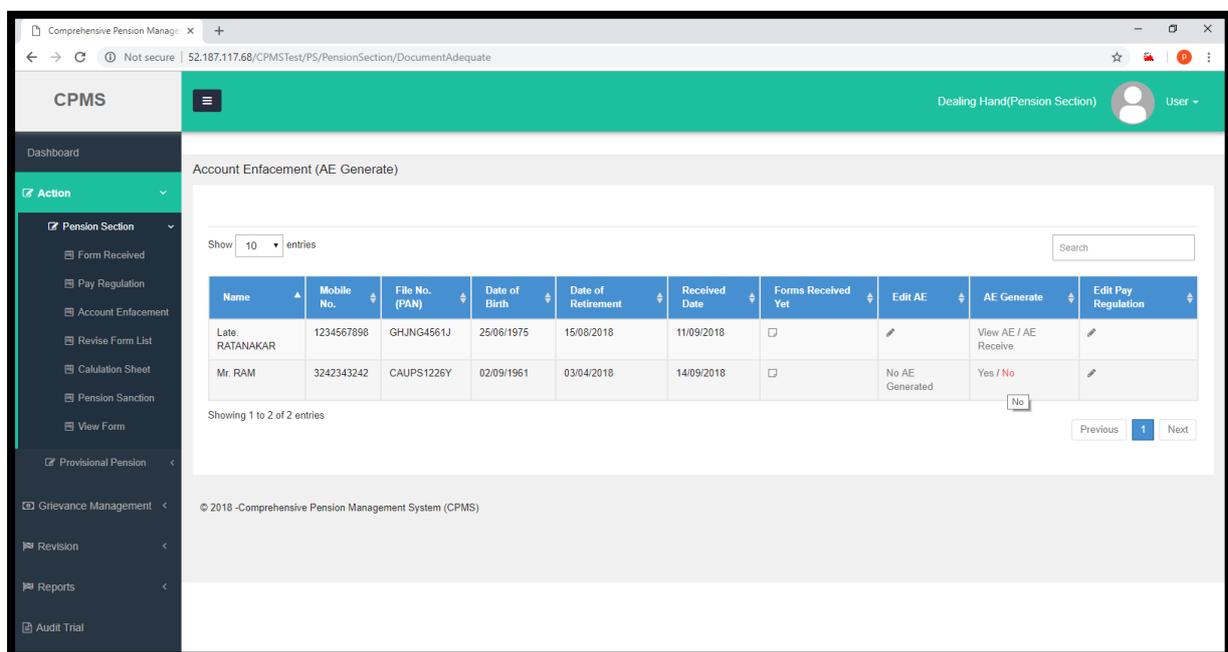


Fig 3.6 (a)


 DEPARTMENT OF TELECOMMUNICATIONS
 O/O CCA, Bihar Telecom Circle, Patna 2nd Floor, CTO Annex Building,
 Patna - 800 001 Tele.No. 7854133654, E-mail: braao34@gmail.com

NO.AE/ _____ Dated : 22/09/2018

To,
Chapra TD

Sub:

Sir,
In order to finalize the above case following may please be addressed:-

S.No	Subject	Remarks/objection/omissions	+
------	---------	-----------------------------	---

Kindly take necessary action in respect of above so that pension /family pension may be settled at earliest. If any legal complication arises due to delay in settlement of pension /family pension case, the responsibility there of will come at your end.

BR AAO
7854133654

Fig 3.6 (b)

A Pension case in which all the papers have not been received or some matter remains unaddressed shall remain pending at AE stage itself. Only when all issues relating to pensioner etc are finalized then case should move beyond AE tab. Before going to Revise Form Stage, it may be checked that Pay regulation has been correctly filled.

3.5 Revise Form List

- The case will now flow from Account Encasement at DH (Pension Sanctioning Section) level to 'Revise Form List' Tab (**Action->Pension Section->Revise Form List**).
- The DH (Pension Sanctioning Section) will then select the particular pension case. The DH (Pension Sanctioning Section) can view Pay Regulation Form. The calculation sheet can be reviewed and edited, if required. **It should be noted that if there is any discrepancy in calculation of pension or pensionary benefits, the same can be rectified here. After this the figures cannot be rectified. Hence due diligence need to be exercise here.** Fig (3.7)
- DH (Pension Sanctioning Section) will, if required, edit FORM 7 (Family Pension) or FORM 18 (Normal Pension) and calculate the Retiree's pensionary benefits. (Fig 3.7)
- DH (Pension Sanctioning Section) will then enter the following information in FORM 7/ FORM18 (some information is auto populated):

- a) Service to which he/she belongs.
- b) Scale of Pay/Pay Band & Grade pay of the post.
- c) Whether the appointment mentioned above was under Government or outside the Government on foreign service terms
- d) Particulars relating to military service, if any
- e) Particulars relating to the service in autonomous body, if any
- f) Period not counting as qualifying service?
- g) Additions to qualifying Service?
- h) Whether any leave without pay?

**Points d, e, f, g and h to be filled in carefully, as they will impact the calculation of net qualifying service.*

- i) Emoluments drawn during 1/ 10 month before retirement.

**Point "i" will calculate Average Emolument, which will be compared against LPD to arrive at pensionary benefits.*

- j) Govt. dues recoverable out of gratuity.

- After filling the details, the DH will click on submit and calculate button. The amount of gratuity, commutation and monthly pension will be calculated and displayed.
- 'Revise Form 'action can be performed if there is a need to carry out correction in Form 7 received from HoO.

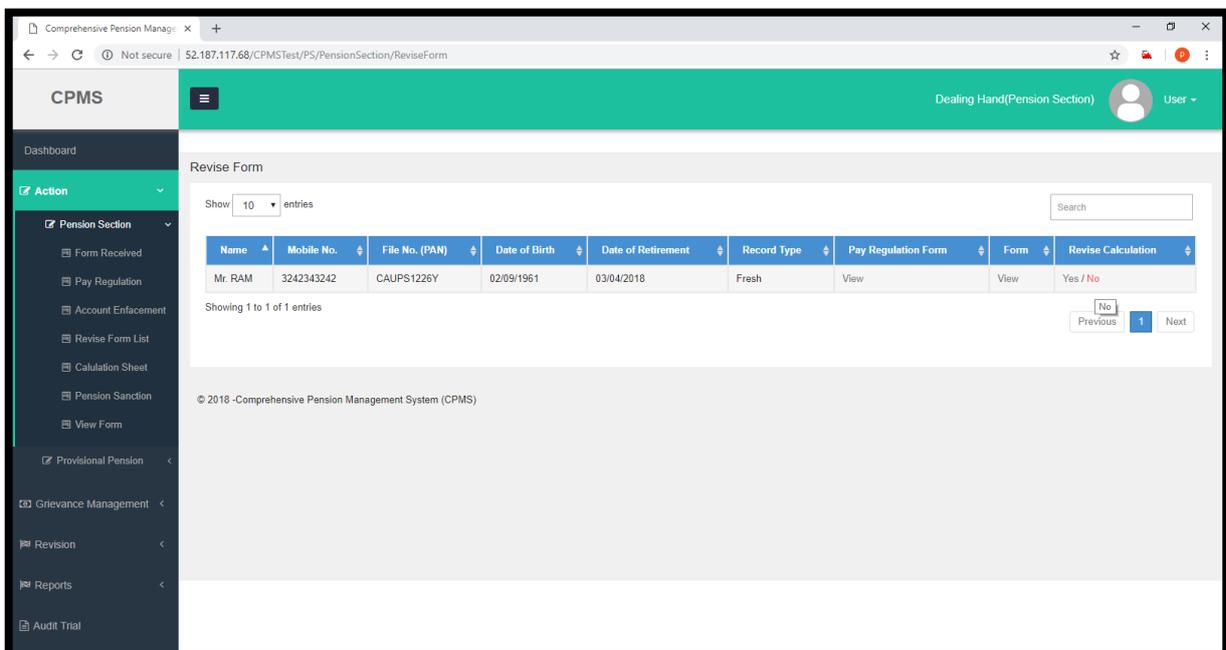


Fig 3.7 (a)

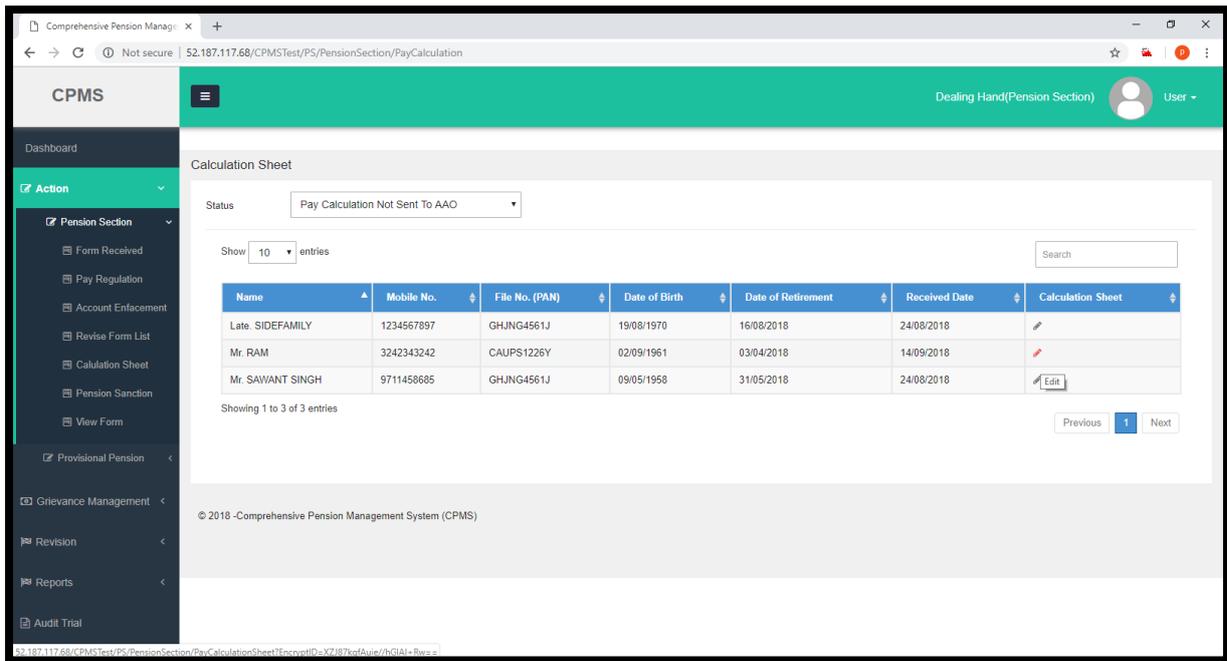


Fig 3.7 (b)

WORKING SHEET (FORM 18)
 [SEE RULES 78(1), 80(1), 80(3), 80 (5), 80-B (1) AND 80-B (5)]
**FORM FOR ASSESSING AND AUTHORIZING THE PAYMENT OF FAMILY PENSION
 AND DEATH GRATUITY WHEN A GOVERNMENT SERVANT DIES WHILE IN SERVICE**

1.	Name of the deceased government servant	Late. ABHISHEK SINGH
2.	Father's/Husband's Name	ABHI
3.	PAN NO.	XXXXXX561J
4.	Date of Birth	15/08/1964
5.	Date of Death	31/08/2014
6.	Service to which he/she belongs(indicate name of Organised service, if any, otherwise say General Central Service)	Central Govt/ BSNL
7.	Particulars of post held at the time of death	
	a. Name of the office	dot
	b. Post held substantively	ADET
	c. Officiating Post	Officiating Post
	d. Scale of Pay/Pay Band & Grade pay of the post*	IDS-DR (75000 - 100000)

e. Basic Pay/Pay in the pay band & Grade pay 25000

f. Whether the appointment mentioned above was under Government or outside the Government on foreign service terms?

g. If on foreign service, scale of pay/pay band, pay in the pay band and grade pay of the post in the parent department N.A.

8. Date of beginning of service 18/08/1989

9. Cause of ending service Death

10. Particulars relating to military service, if any

11. Particulars relating to the service in autonomous body, if any

12. Amount and nature of any pension/gratuity received for previous civil service, if any

13. Length of Service for death gratuity 18/08/1989 to 31/08/2014 25 YEARS 0 MONTHS 14 DAYS

a. Details of omission, imperfection or deficiencies in the Service Book which have been ignored [under rules 59(1) (b) (ii)]

b. Period not counting as qualifying service?

c. Additions to qualifying Service?

Whether any leave without pay ?

d. Net Qualifying service 18/08/1989 to 31/08/2014 25 YEARS 00 MONTHS 14 DAYS

e. Qualifying service expressed in terms of complete six monthly periods(Period of three months and above is to be treated as completed six monthly period (Rule 49) 50 HALF MONTHLY PERIOD

14. Emoluments

a. Emoluments in terms of Rule33

b. Emoluments drawn during one month pending death :

Sl.No.	Pay Commission	Period From	Period To	Pay in Pay Band - Grade Pay/Level	Basic Rate	NPA Rate	(Basic+NPA) For Avg. Emoluments	+
1	2nd PRC	01/08/2014	31/08/2014	IDS-DR (75000 - 100000)	25000		25000	Delete

Others :

The date on which action initiated to -

a. The date on which intimation regarding the death of Government servant was received by the Head of Office 31/08/2014

b. obtain the 'No demand certificate' from the Directorate of Estates as provided in rule 80-C (1).

c. assess the Government dues other than the dues pertaining to occupation of Government accommodation as provided in rule 80-C (2).

d. assess the service and emoluments qualifying for death gratuity and family pension as provided in rules 78 and 79.

Details of Govt. dues recoverable out of gratuity

(i) Licence fee for Govt. accommodation see sub-rules (2),(3) and (4) of rule 2

(ii) Dues referred to in Rule 73

(iii) Amount indicated by Directorate of Estates to be withheld under subrule(S) of Rule 72

[Submit & Calculate](#)

Fig 3.7 (c)

IMPORTANT: -Calculation Sheet shows the pensionary benefits and pension as applicable to the pensioner. Once this form is reviewed and next stage initiated, it cannot be edited. Therefore, due diligence should be exercised while reviewing and correcting, if required, in all important fields like Pay Band, pay level, Qualifying/Non Qualifying service etc.

In case Wrong or incorrect information is saved in the system, please immediately inform the Helpdesk.

3.6 Calculation Sheet

- The case will now flow into Calculation Sheet at DH (Pension Sanctioning Section) level **(Action->Pension Section-> Calculation Sheet)**.
- DH (Pension Sanctioning Section) will select the case and view the calculation sheet and submit it to AAO for further approval. (Fig 3.8)

CALCULATION SHEET		
File No. : 2014/BHR/15 DDO : (201536)NCDDO TO PAO		
1.	Name of Government Servant	Late. ABHISHEK SINGH
2.	Designation	ADET
3.	Scale of the Post Last Held	75000 - 100000
4.	Date of Birth (dd/mm/yyyy)	15/08/1964
5.	Date of Entry Into Government Service (dd/mm/yyyy)	18/08/1989
6.	Date of Ending Service (dd/mm/yyyy)	31/08/2014
7.	Total Length of Gross Service	25 YEARS 0 MONTHS 14 DAYS
8.	Total Length of Non-Qualifying Service	00 YEARS 00 MONTHS 00 DAYS
9.	Total Length of Addl-Qualifying Service	00 YEARS 00 MONTHS 00 DAYS
10. (i).	Total Length of Qualifying Service	25 YEARS 00 MONTHS 14 DAYS

(ii). Qualifying Service In Half Years 50

11. Emoluments drawn during 1 month period and those reckoned for calculation of Average Emoluments

Pay From	Pay Upto	Pay in Pay Band - Grade Pay/Level	Basic Rate	NPA Rate	BR+NPA+Grade Pay(in Rs)
01/08/2014	31/08/2014	IDS-DR (75000 - 100000)	25000		25000.00

12. Emoluments for Pension N.A

13. Emoluments for Family Pension Rs. 25000/-

14. Emoluments for Death Gratuity Rs. 47825/- (DA 91.30 %, Basic Rate Rs. 25000)

15. (a). Amount of Service Gratuity N.A.

(b). Amount of Death Gratuity Rs. 1195625/- Calculation of DCRG is as follows :
(Emoluments for DCRG * 50) / 2)
(Subject to Maximum of Rs 20,00,000/-)

16. Details of deductions/adjustments on account of payments

Licence fee for Govt. accommodation	Dues referred	Withheld Amount	Total	NET GRATUITY PAYABLE
0.00	0.00	0.00	NIL	Rs. 1195625/-

17. Details of Pension :-

a. Amount of Monthly Pension before : N.A

b. Class of Pension : Death

c. Date of commencement of Pension (dd/mm/yy) : 01/09/2014

d. Percentage / amount of Pension Commuted : N.A

e. Commuted Value : N.A

f. Commuted Value Payable : N.A

g. Reduced monthly Pension after commutation : N.A

h. Restoration of commuted portion of Pension : ---

18. Medical Allowance : Nil

19. Details of Family / Nominee :

Name	Relationship with the Govt. Servant	Date of Birth (for children)	Physically Handicapped	Family Pensioner ?
SUNNY SINGH	Son	31/08/1993	No	YES

20. Amount of Family Pension :

a. At Enhanced Rate : Rs. 12500/-

b. At Normal rate : Rs. 7500/-

21. BANK DETAILS :

Bank Account No : 46456456

Name of Bank : PUNJAB NATIONAL BANK

IFSC Code : PUNB0000200

Branch and Code No. : ABU ROAD : 0002

Location : ABURD

District : RAJASTHAN

State : RAJASTHAN

Pincode : 307026

Remarks :

Allocation of AAO :

braao - BR AAO

Submit

Cancel

Fig 3.8

- Now the case will flow to AAO (Pension Sanctioning Section) (**AAO Login**→ **Approval**→ **Pension Section**→ **Calculation Sheet**)
- The AAO (Pension Sanctioning Section) can either **Approve/ Return** the case. (Fig 3.9)
- If AAO (Pension Sanctioning Section) returns the case, it will again go to DH (Pension Sanctioning Section) for editing in “**Revise Form**” tab. In case of Approval, it will go to AO (Pension Sanctioning Section).
- Now the case will flow to AO (Pension Sanctioning Section) (**AO Login**→ **Approval**→ **Pension Section**→ **Calculation Sheet**)
- The AO (Pension Sanctioning Section) can **Approve/ Return** the case.
- If AO (Pension Sanctioning Section) returns the case, it will again go to DH (Pension Sanctioning Section) for editing in “**Revise Form**” tab.

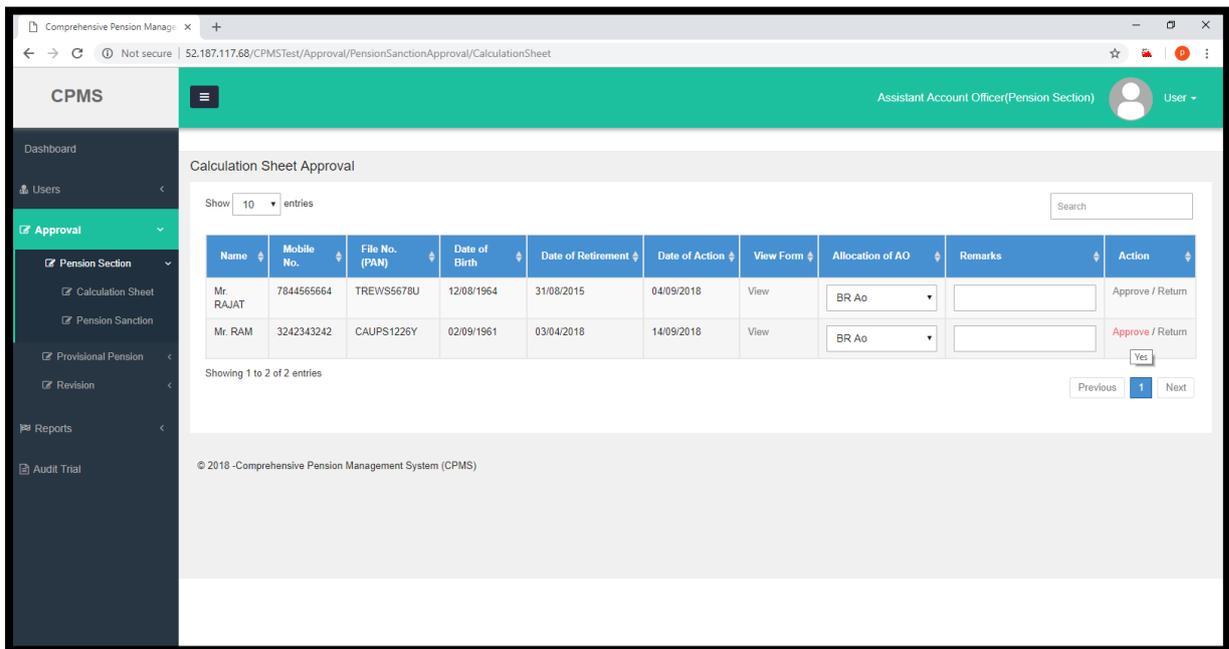


Fig 3.9 (a)

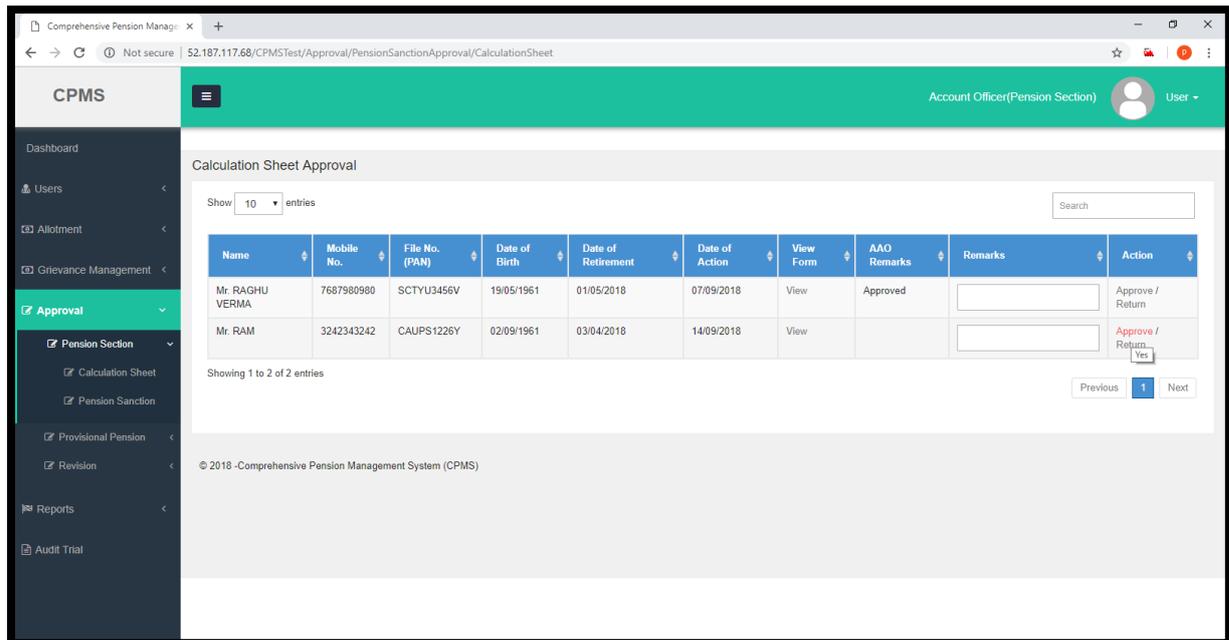


Fig 3.9 (b)

3.7 Pension Sanction

- After the Approval of Calculation Sheet by the AO, the case will come to Pension Sanction tab of DH Login. **(DH Login → Action → Pension Section → Pension Sanction)**
- DH can view Sanctions and ePPO. Fig 3.10) (a)
- Now DH will send the case to AAO for approval.
- AAO can approve the case and send it to AO for further approval. **(AAO Login → Action → Pension Section → Pension Sanction)**
- AO can approve the case **(AO Login → Action → Pension Section → Pension Sanction)**(Fig 3.10)(b)
- This approval can be done only on Internet Explorer version 9 or 11 and by using the Digital Signature Certificate (DSC) of AO Pension Section.
- Post approval by AO, case will move to the AO- PDA section.
- DSC installation and signature process is dealt separately in the Chapter on DSC Installation.

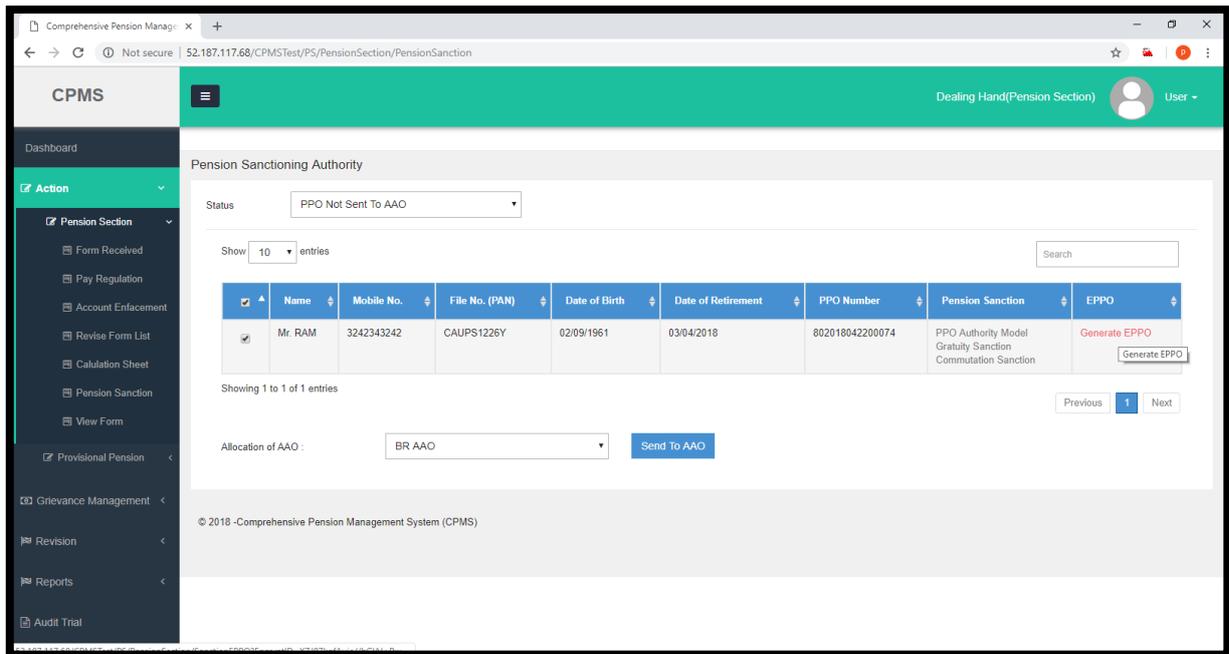


Fig 3.10 (a)

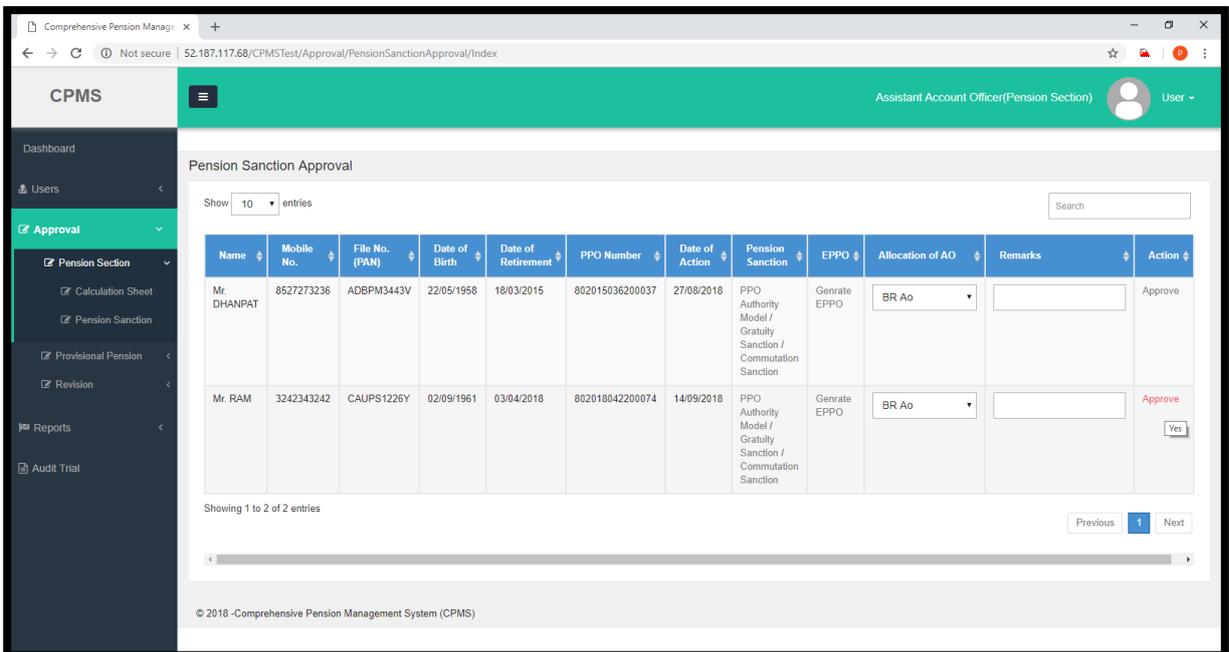


Fig 3.10 (b)

Name	ID	Service ID	Date of Birth	Date of Joining	Date of Sanction	Date of Approval	Sanction Type	Action
Mr. RAJ KUMAR	4564564564	GHJNG4561J	09/05/1958	31/05/2018	802018051200053	28/08/2018	PPO Authority Model / Gratuity Sanction / Commutation Sanction	Approve
Mr. RAJU	8527273236	GHJNG4561J	09/06/1970	01/08/2018	802018081100054	29/08/2018	PPO Authority Model / Gratuity Sanction / Commutation Sanction	Approve
Late. SRINIVASAN Q	9711498168	CJDPK7614N	26/07/1958	26/01/2018	802018019200072	12/09/2018	PPO Authority Model / Gratuity Sanction	Approve
Mr. RAM	3242343242	CAUPS1226Y	02/09/1961	03/04/2018	802018042200074	14/09/2018	PPO Authority Model / Gratuity Sanction / Commutation Sanction	Approve

Showing 1 to 7 of 7 entries

Previous 1 Next

© 2018 - Comprehensive Pension Management System (CPMS)

Fig 3.10 (b)

Important: - AO Pension section will send the physical copy of following documents to AO PDA, after Digital signing of EPPO and Sanctions are done (the same is also mentioned in the enclosures section of PPO Authority Model).

- 1. Physically signed copy of Pension authority**
- 2. Photo Copy of CDA/IDA/DR List.**
- 3. Photocopy of PAN no and Aadhaar no.**
- 4. Bank undertaking and Mandate form of pensioner, indicating name and full address of the Authorised Public Sector Bank.**

CHAPTER 4

4. PDA Section

This chapter deals with pension case flow in the PDA Section of CCA Offices.

4.1 Allotment of Pension Case

- The pension case coming from Pension Sanctioning Section will appear in the 'Allotment' tab of the AO PDA Section. **(AO PDA Login → Allotment → Allocate to PDA- DH)**
- AO PDA will allot the case to the Dealing Hand of the PDA section. (Fig.4.1)

The screenshot shows the CPMS interface for an Accounts Officer (Pension Disbursing Authority). The main content area is titled 'Allot Cases to Dealing Hand(DH)'. It features a search bar and a table with the following data:

✓	Name	Mobile No.	File No. (PAN)	Date of Birth	Date of Retirement	Date of Sent To PAO	SSA Unit Name	Retirement Type	Pension Type
✓	Mr. SYED HUSSAIN AFZAL RIZVI	8810455467	XXXXXX416R	15/06/1959	31/03/2018	23/10/2018	Jorhat TD	Voluntary Retirement on being Declared surplus (Rule 29-A)	Normal Pension

Below the table, it shows 'Showing 1 to 1 of 1 entries' and navigation buttons for 'Previous', '1', and 'Next'. At the bottom, there is an 'Allocation of DH:' dropdown menu with 'brpdadh2 - BIHAR PDA DH' selected, and a 'Send To DH' button next to a 'Clear' button.

Fig.4.1

- Now Case will flow to DH PDA Section. **(DH PDA Login → Action → PDA Section → Sanction Order Received).**
- **DH** should take the printouts of digitally signed EPPO(2 copies) Commutation Sanction, Gratuity Sanction, PPO Authority Model in **5 sets** from the links available on the page, as shown in the screenshot below. After AO PDA approves and sends the case to PFMS for payment, the above hardcopies (1 set each) needs to be **physically sent** to HoO section, Pension section, Cash section and Pensioner. One copy will remain with PDA section.
- Now the DH (PDA Section) will select the case and click on **Receive Sanction & Send to Bill** button. At this stage the name of the employee will appear in the name column of the table as shown below.

The screenshot displays the 'Sanction Order Received' section of the CPMS interface. It features a table with the following data:

Name	Mobile No.	File No. (PAN)	Date of Birth	Date of Retirement	PPO Number	Pension Sanction	EPPO
Mr. SYED HUSSAIN AFZAL RIZVI	8810455467	XXXXXX416R	15/06/1959	31/03/2018	802018032200160	PPO Authority Model Gratuity Sanction Commutation Sanction	EPPO

Below the table, there are buttons for 'Receive Sanction & Send to Bill' and 'Clear'. The interface also includes a search bar and pagination controls.

Fig.4.2

4.2 Vendor Verification in PFMS

- Now, from the DH login of PDA Section go to Action then Vendor Verification (**DH PDA Login → Action → Vendor Verification**). The case will appear here in the name of pensioners/ claimants. From PFMS the pensioner's/ claimant's (Vendor) bank credentials will be verified and the status with error description in the table will be shown as in Fig. 4.3 below. This process takes approximately 5-10 minutes and when the verification is complete, the case will automatically go to Bill Generation Tab. Otherwise failed cases will remain at this stage which may be **Resend**.
- In case the failure is due to wrong Bank account details, the same will be flashed in the Error Description column. The **wrong Bank account details can be rectified** from the **PDA Utility tab** in the AO PDA (**Go to AO PDA login, open PDA Utility tab, enter PPO no. of the particular case and edit the Bank details as shown in Fig. 4.4(a) and Fig. 4.4(b)**).

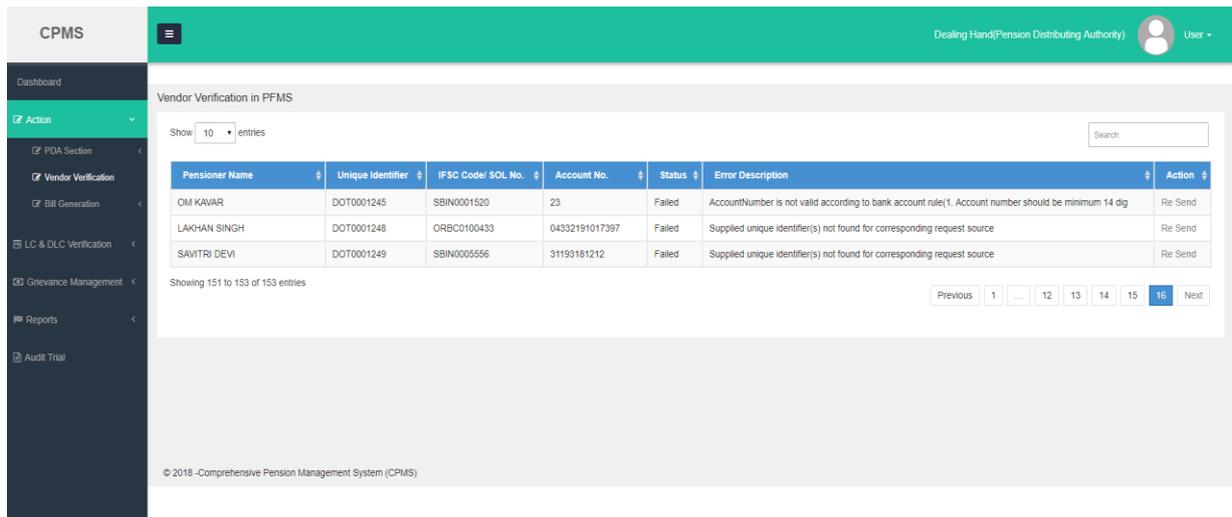


Fig.4.3

- If the case has failed because of any reason other than wrong bank details, the case may be **Resend**.

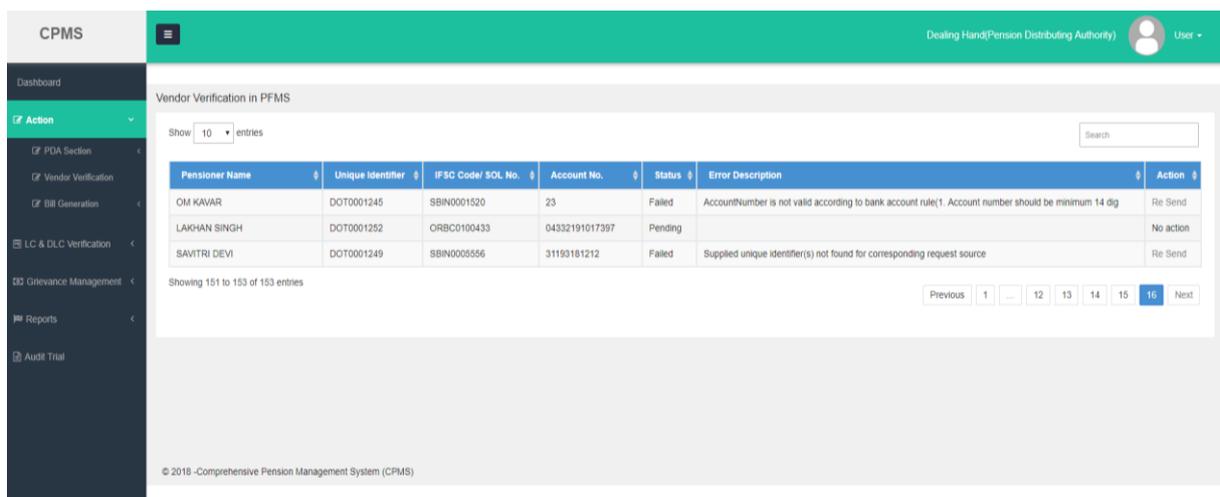


Fig.4.4

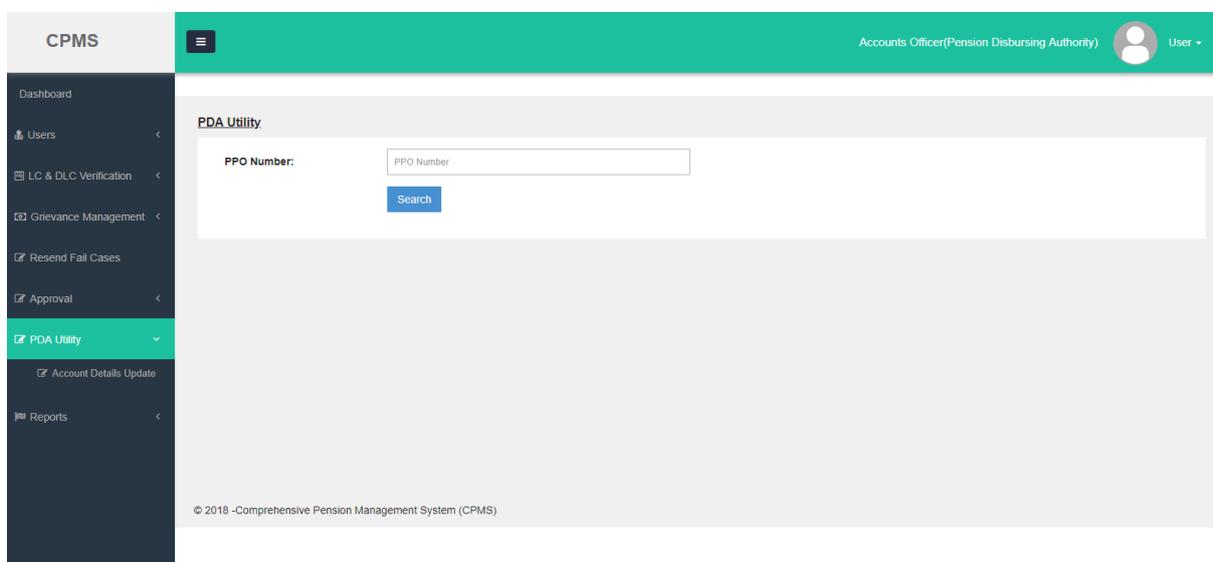


Fig.4.4(a)

The screenshot shows the 'PDA Utility' form in the CPMS system. The user is logged in as 'Accounts Officer(Pension Disbursing Authority)'. The form contains the following fields:

- PPO Number:** 802018071200117
- Personal Details:**
 - Name: Mr. RAJ KUMAR
 - DOB: 28/12/1958
 - Type of Retirement: Superannuation
 - PPO Number: 802018071200117
 - DOR: 05/07/2018
- Bank Details:**
 - IFSC Code: SBIN0012732
 - Branch Name: ARJUNGANJ
 - Bank Name: STATE BANK OF INDIA
 - Bank Account Number(Latest): 31108734430
 - Type of Bank Account: Single

Fig.4.4(b)

After completion of Vendor Verification in PFMS the bill will move to the next section of DH log-in of PDA Section i.e. Bill Generation.

4.3 Bill Generation

- From the DH log-in of PDA Section go to Others Bill Generate (**DH PDA Login→Bill Generation→Others Bill Generation**). Bill other than monthly bills like Commutation, DCRG, etc. will appear at this Tab. Here the bills are appearing in the name of claimants who will get the payment through PFMS. Now select the case from the check box and click Generate Bill Button. The bill will be generated and it will go to AAO of PDA Section.

The screenshot shows the 'Others Bill Generate' page in the CPMS system. The user is logged in as 'Dealing Hand(Pension Distributing Authority)'. The page displays a table of bills with the following data:

Select	Pensioner Name	PPO Number	IFSC code/ Sol Id	Account No.	DA Type	Type of Retirement	Type of Bill	Amount
<input type="checkbox"/>	Mr. SYED HUSSAIN AFZAL RIZVI	802018032200160	PUNB0029400	0294001300001613	IDA	Voluntary Retirement on being Declared surplus (Rule 29-A)	Commutation Bill	615369
<input type="checkbox"/>	Mr. SYED HUSSAIN AFZAL RIZVI	802018032200160	PUNB0029400	0294001300001613	IDA	Voluntary Retirement on being Declared surplus (Rule 29-A)	DCRG Bill	1146734

Showing 1 to 2 of 2 entries (filtered from 13 total entries)

© 2018 -Comprehensive Pension Management System (CPMS)

Fig.4.5

- AAO of PDA Section will log-in and select the case by clicking the check box corresponding to the case and click on Approve button (**AAO PDA Login→Approval→Others Bills→Approve**). The case will go to AO of PDA Section for approval.

Others Bill Generate

Show 10 entries

	Pensioner Name	PPO Number	IFSC code/Sol Id	Account No.	DA Type	Type of Retirement	Type of Bill	Amount
<input type="checkbox"/>	Mr. SYED HUSSAIN AFZAL RIZVI	802018032200160	PUNB0029400	0294001300001613	IDA	Voluntary Retirement on being Declared surplus (Rule 29-A)	DCRG Bill	1146734
<input type="checkbox"/>	Mr. SYED HUSSAIN AFZAL RIZVI	802018032200160	PUNB0029400	0294001300001613	IDA	Voluntary Retirement on being Declared surplus (Rule 29-A)	Commutation Bill	615369

Showing 1 to 2 of 2 entries (filtered from 46 total entries)

© 2018 -Comprehensive Pension Management System (CPMS)

Fig.4.6

- Now, AO of PDA Section will log-in and go to approval then other bills (**AO PDA Login→ Approval→ Others Bills**). The AO will then select the appropriate Account Head Code from the drop down list on the top. After entering the “Not Payable Before Date” click on Approve button. Now the Bill will automatically go to PFMS for payment.
- After this, the 5 copies of digitally signed Sanctions (taken earlier by DH) should be sent to the HoO section, Pension Section, Cash Section, Pensioner and 1 copy retained in PDA section (as mentioned on **Page 71, sub heading 4.1** of this manual).

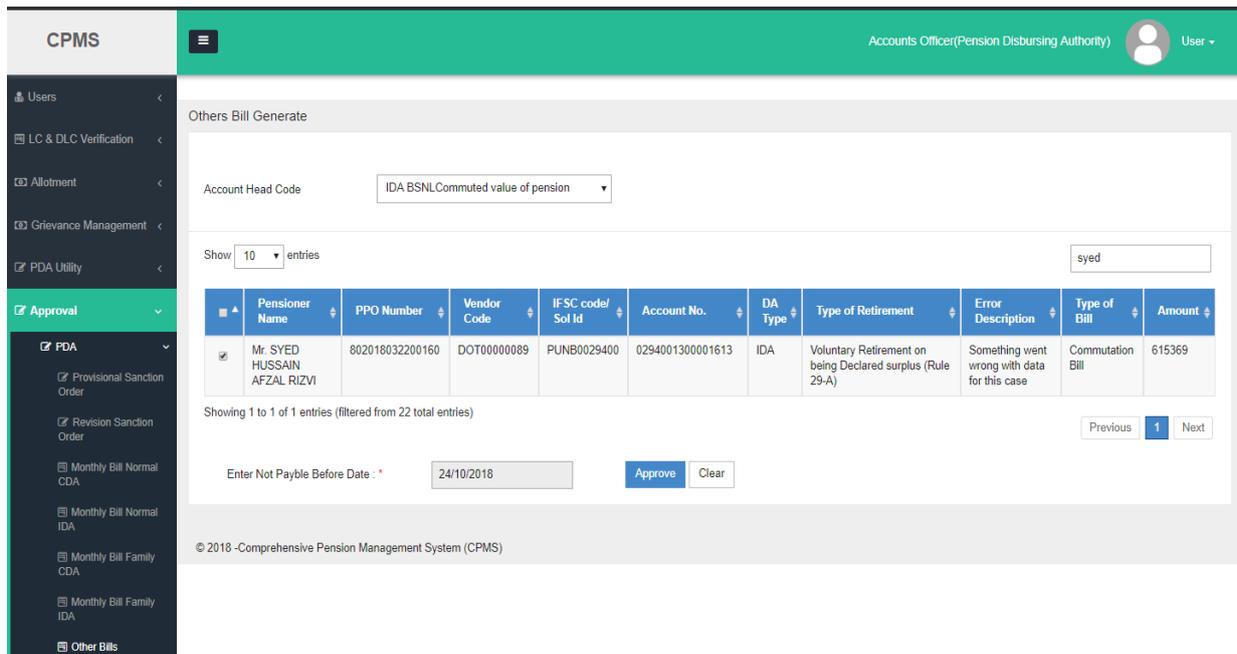


Fig.4.7

4.4PFMS Payment

- Now go to PFMS and log-in with PAO credential. Select the Bill(s), **Generate Payment Batch File** and sign Digitally with the DSC. If the amount of the payment is more than 10 lakhs, signatory 2 is required for making the payment. The Payment screens are given below.

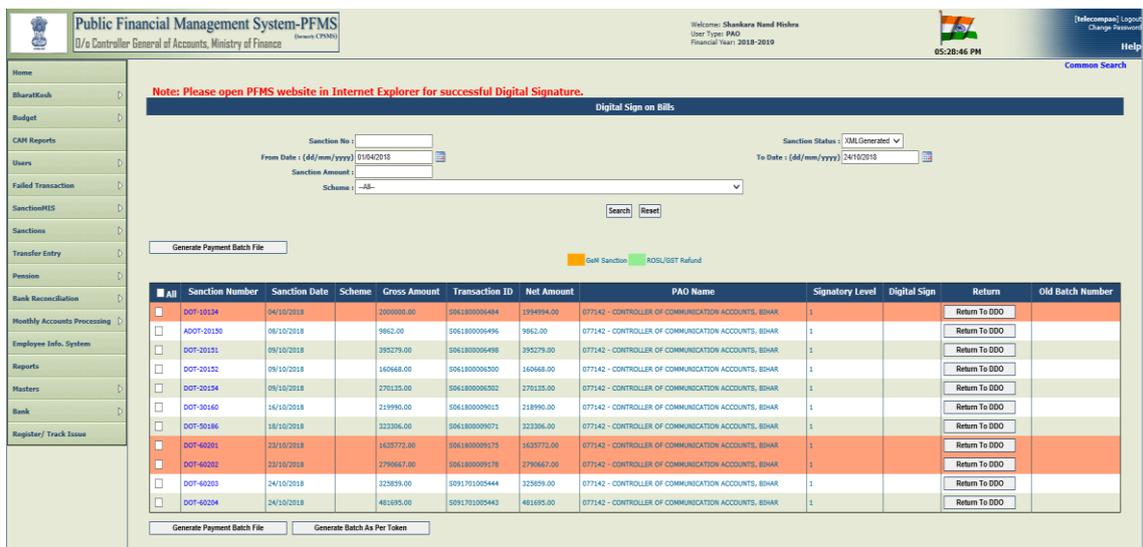


Fig.4.8

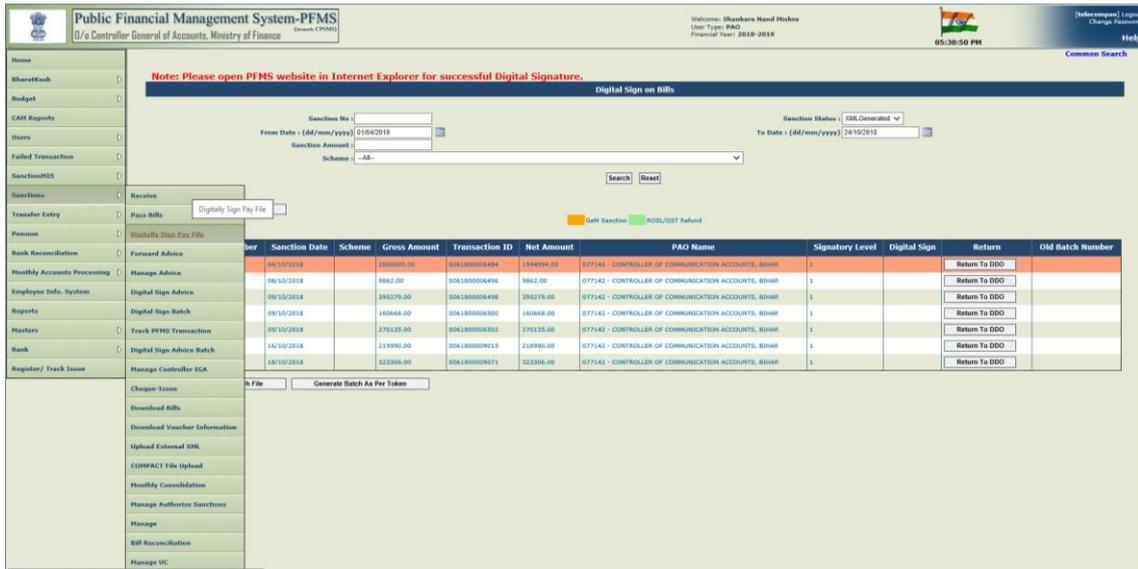


Fig.4.9

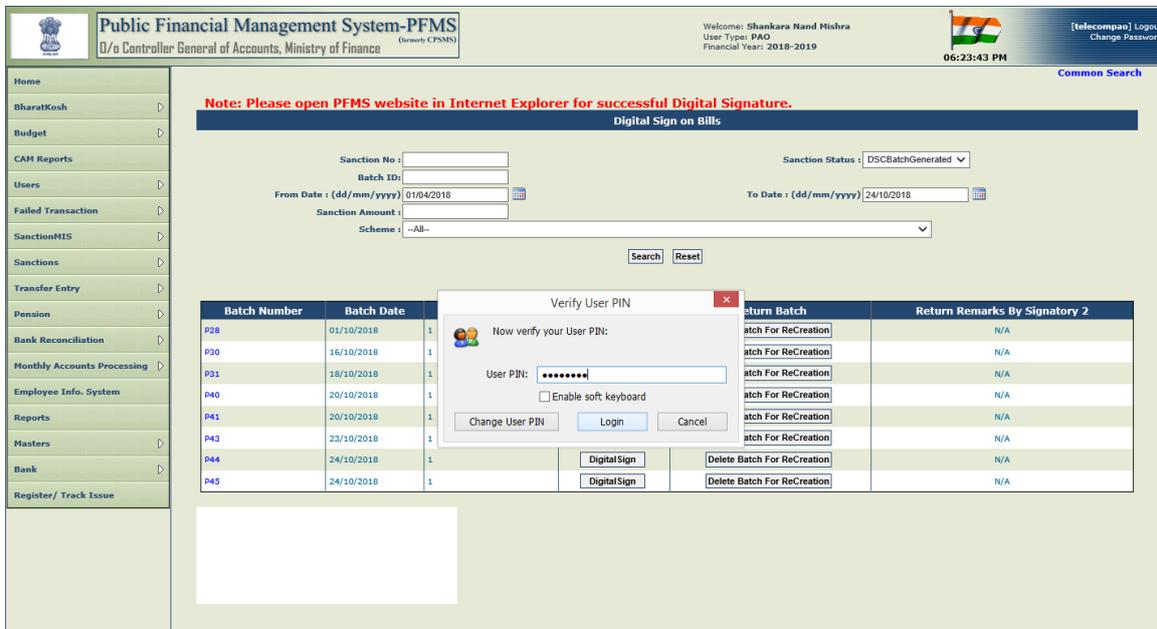


Fig.4.10

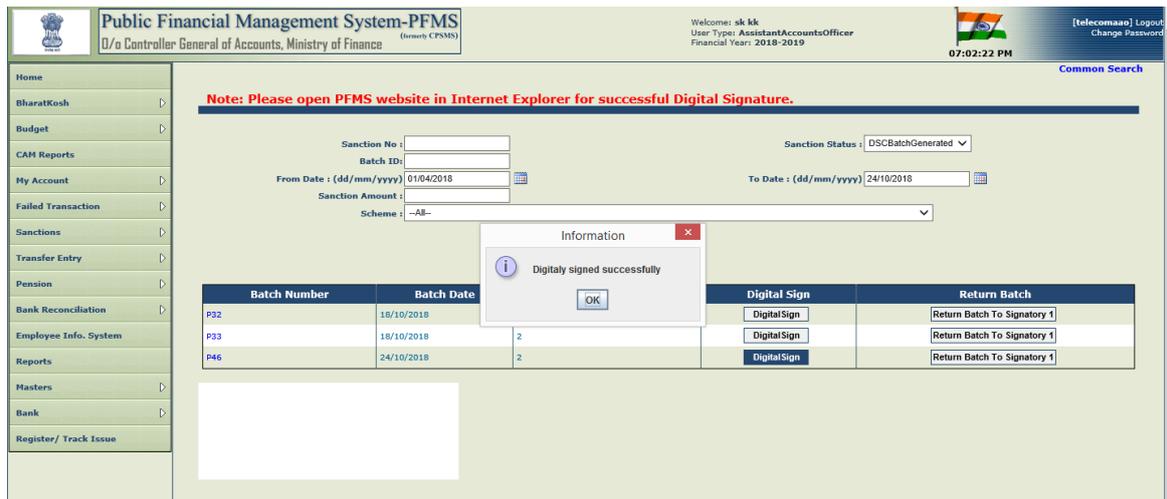


Fig.4.11

- It is recommended that above payment from PFMS should be done on the **same day**, when AO PDA sends the case to PFMS. After successful payment from PFMS the cases will appear **LC & DLC Verification** tab of PDA DH.
- PDA AO can view, if required, the PFMS transaction report of pensionary benefits of the pensioner/claimant, in the **Reports Tab → Other Bill Report**.
- Thereafter the cases will be processed as per the arrear section, below.

4.5 Arrears

- After successful payment, login from DH PDA and click the tab **LC & DLC Verification (DH PDA Login → LC & DLC Verification → LC Verification)**.

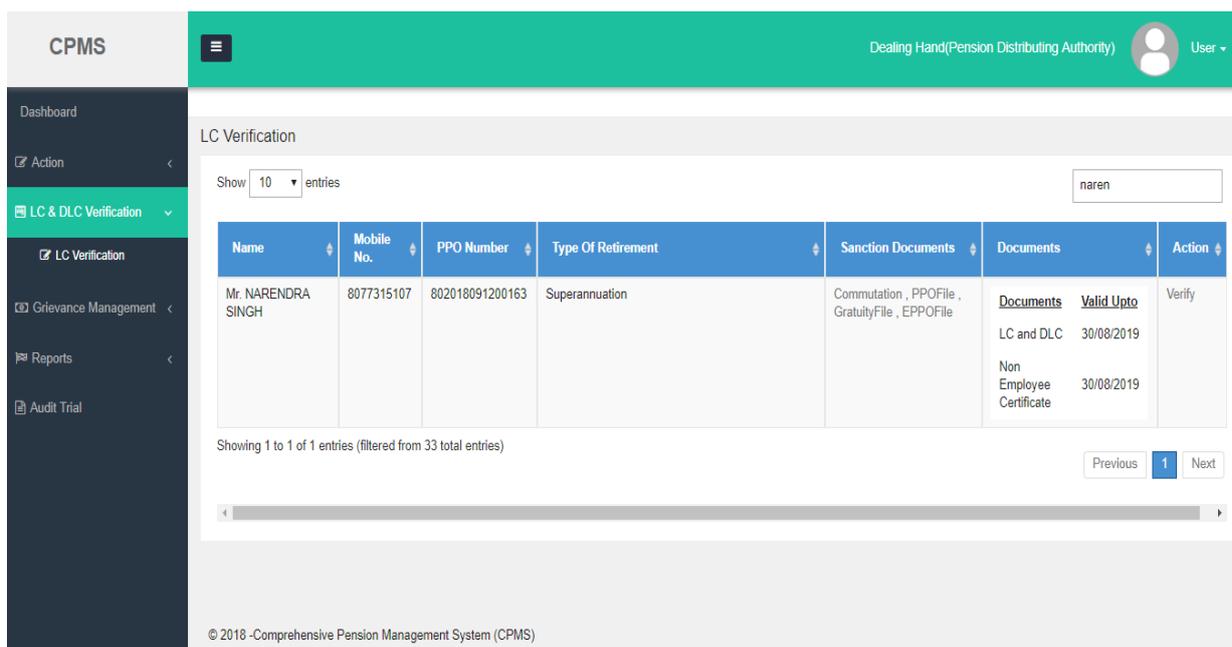


Fig.4.12

- Now click on Verify link shown in the Action column, a popup window will appear as shown in the figure below. Here we have to select the **Life Certificate and Non Employment (FMA also, in case of CDA pensioners) Validity**, From and to dates (From date will be next date, from the date of retirement). After filling the details click on Confirm button. (Note-The above certificate date is for non-employment of pensioner)

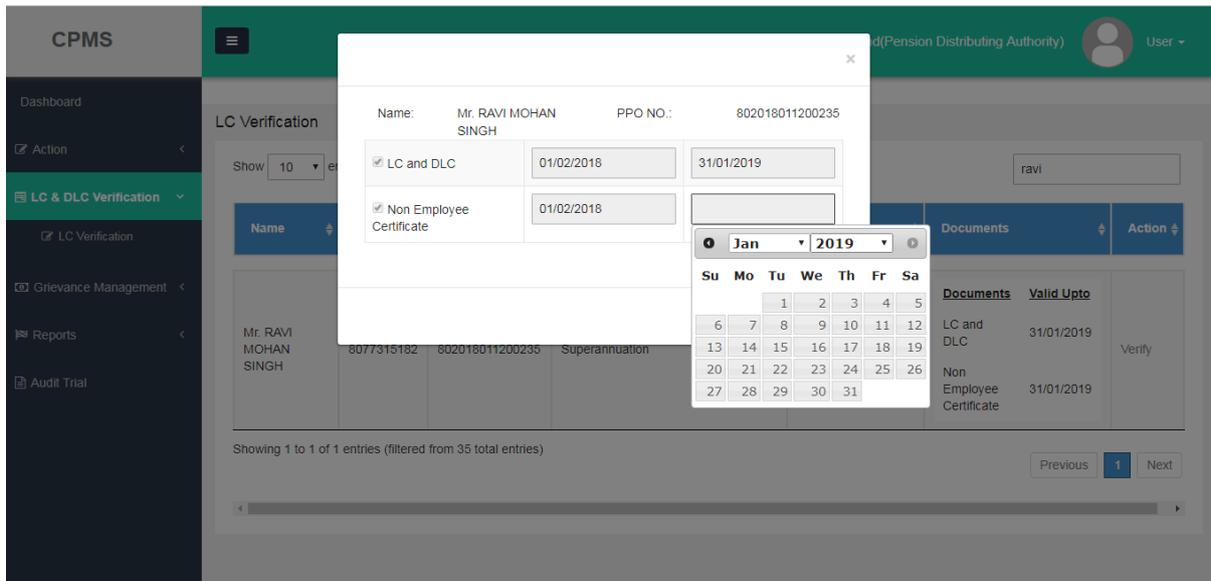
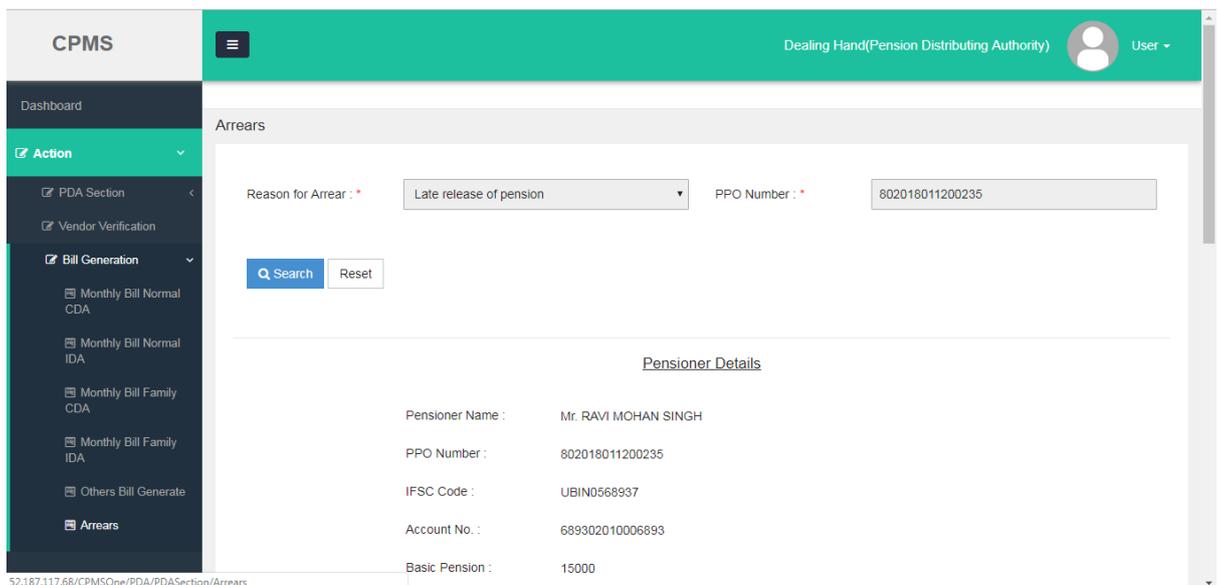


Fig.4.13

- After LC & DLC the case will go in Arrears tab (**PDA DH login → Action → Bill Generation → Arrears**)



- Here select the **Reason for Arrear** and fill the **PPO Number** of pensioner, then click on the Search button. Now it will show the Arrear calculation. After checking the calculation, printout of the arrear details should be taken and the soft copy of the same saved (by clicking **ctrl +P**). Now click on the **Save & Send for Approval** button. Then case will go to AAO of PDA Section for approval. **(The above printout will be used as Arrear Sanction for PFMS payment).**

CPMS Dealing Hand(Pension Distributing Authority) User

IFSC Code : SBIN0003069
 Account No. : 31800538776
 Basic Pension : 26550
 DR Rate : 9.00
 FMA : 1000 (For CDA only) and Nil for IDA

Arrear Calculations

Date of Retirement : 31/10/2018 Basic Pension : 26550
 Date of Payment of Commutation : 26/11/2018 Reduced Pension : 15930
 DOP : 28/11/2018

Period	Amount	DA Rate
01/11/2018 - 30/11/2018	19,320	9.00
Calculated Amount	19,320	

Save & Send For Approval Cancel

52.187.117.68/CPMSOne/PDA/PDASection/Arrears

- AAO PDA will select the case (by clicking the check box corresponding to the case) and click on Approve button (**PDA AAO login → Action → Approval → PDA → Arrears**). The case will go to AO of PDA Section for approval.

CPMS Assistant Account Officer(Pension Disbursing Autho) User

Arrears

Show 10 entries Search

	Pensioner Name	PPO Number	IFSC code/ Sol id	Account No.	Type of Retirement	Type of Bill	Amount	Period From	Period To	View Calculation
<input type="checkbox"/>	Mr. SURESH CHAND	802018101100227	SBIN0000535	30674551072	Superannuation	Late release of pension	11906	31/10/2018	30/11/2018	View
<input type="checkbox"/>	Mr. GAMBHEER SINGH	802018101100221	SBIN0003069	31800538776	Superannuation	Late release of pension	19320	01/11/2018	30/11/2018	View

Showing 1 to 2 of 2 entries Previous 1 Next

Remarks :

© 2018 -Comprehensive Pension Management System (CPMS)

52.187.117.68/CPMSOne/Approval/PDAApproval/ArrearBills

- Now, AO PDA (**PDA AO login → Action → Approval → PDA → Arrears**) will select the appropriate Account Head Code from the drop down list. Now select the case (by clicking the check box corresponding to the case) and enter **Not Payable Before Date** and click on **Approve** button. Now the Bill will automatically go to PFMS for arrear payment.

The screenshot displays the 'Arrears' section of the CPMS. The 'Account Head Code' dropdown is open, showing options: Normal CDA, Please Select, Normal IDA, Normal CDA, Family IDA, and Family CDA. The table below lists one entry for Mr. GAMBHEER SINGH with PPO Number 802018101100221, Vendor Code EXT00395391, IFSC code SBIN0003069, Account No. 31800538776, Type of Retirement Superannuation, Type of Bill Late release of pension, Amount 19320, Period From 01/11/2018, and Period To 30/11/2018. The bottom of the screen features a form with 'Enter Not Payable Before Date', 'Remarks', and an 'Approve' button.

- After **Arrears payment**, the case will go to monthly bill section (**PDA DH login → Action → Bill Generation → Monthly bill (Normal/Family, IDA/CDA)**).

4.6 Monthly Bill

- While processing the case for monthly bill the income tax deducted shall be filled and accordingly the bill shall be processed. The income tax deducted shall be used for feeding income tax on monthly and quarterly basis.
- A printout of the monthly bill shall be taken and handed over to AO Cash conveying the sanction.
- Thereafter the cases in DH can be passed to AAO and further to AO for approval. Then AO will send the case for monthly bill/pension payment, through PFMS. This cycle will be repeated for every month.

CPMS Dealing Hand(Pension Distributing Authority) User

Dashboard

Monthly Bill Generation For Normal Pension (IDA)

Tax Percentage: 20% Financial year: 2018-19
 Month: November Reset

Fresh Return

Show 10 entries Search

#	Pensioner Name	PPD Number	IFSCCode/ SOL No.	Account No.	Basic Pension	Commutation Pension	Reduced Pension	DR Rate	Arrear Amount	Total Amount Payable	I.Tax
	Mr. NARENDRA SINGH	802018091200183	SBIN0031497	30885600930	8285	3314	4971	135.00	0	16205	3241.0
	Mr. RAMAWTAR YADAV	802018091200159	PUN80311400	3114000100043961	26870	11948	17922	135.00	0	58420	11885.2
	Mr. SAMAY SINGH YADAV	802018096200161	PUN80331900	3319000400189808	11370	4548	6822	135.00	0	22240	4448.0
	Mr. SYED HUSSAIN AFZAL RIZVI	8020180322200180	PUN80029400	0294001300001813	15315	6126	9189	135.00	0	29956	5991.2
	Mr. ALIKOYA NP	802018051200140	SBIN0007933	20040499848	25870	10348	15522	135.00	0	50802	10120.4
	Mrs. RADHA MISHRA	802018091200068	SBIN0003752	10387930224	12115	9992	2423	135.00	0	18851	3770.2
	Mrs. RAMA K	8020180380200059	IOBA0001858	1858001000014988	14780	11808	2852	135.00	0	22997	4593.4
	Mr. BABU LAL	8020171022200047	UBIN0657404	5740020100000795	28940	11458	17184	135.00	0	58020	11204.0
	Mr. DHANPAT	802017031200038	SCBL0038085	22111054324	16450	6580	9870	135.00	0	32178	6435.2

Showing 1 to 9 of 9 entries Previous 1 Next

[Save & Send for AAO Approval](#)

© 2018 -Comprehensive Pension Management System (CPMS)

Fig.4.14

CPMS Dealing Hand(Pension Distributing Authority) User

Dashboard

Monthly Bill Generation For Normal Pension (IDA)

Tax Percentage: 20% Financial year: 2018-19
 Month: November Reset

Fresh Return

Search

#	Basic Pension	Commutation Pension	Reduced Pension	DR Rate	Arrear Amount	Total Amount Payable	I.Tax	Health and Education Cess	Recovery	Net Payable Amount	Bill Status
1	8285	3314	4971	135.00	0	16205	3241.00	129.84	Recovery	12834	Fresh
901	29870	11948	17922	135.00	0	58420	11885.20	487.41	Recovery	48273	Fresh
806	11370	4548	6822	135.00	0	22240	4448.00	177.92	Recovery	17814	Fresh
813	15315	6126	9189	135.00	0	29956	5991.20	239.85	Recovery	23725	Fresh
1	25870	10348	15522	135.00	0	50802	10120.40	404.82	Recovery	40077	Fresh
1	12115	9992	2423	135.00	0	18851	3770.20	150.81	Recovery	14630	Fresh
88	14780	11808	2852	135.00	0	22997	4593.40	183.74	Recovery	18160	Fresh
195	28940	11458	17184	135.00	0	58020	11204.00	448.16	Recovery	44368	Fresh
1	16450	6580	9870	135.00	0	32178	6435.20	257.41	Recovery	25483	Fresh

Previous 1 Next

[Save & Send for AAO Approval](#)

© 2018 -Comprehensive Pension Management System (CPMS)

Fig.4.15

- PDA AO can view the PFMS arrear transaction report of the pensioner/claimant, in the **Reports Tab**→**Other Bill Report**. (Fig 4.16)

The screenshot displays the 'Other Bill Report' page in the CPMS application. The page header includes the CPMS logo, a menu icon, and the user's role 'Dealing Hand(Pension Distributing Authority)'. The left sidebar contains navigation options like Dashboard, Action, LC & DLC Verification, Grievance Management, Reports, Service Verification, Pendency at HOO level, Other Bill Report, and Audit Trail. The main content area shows a table of transactions with the following data:

Name	PPONumber	PFMS Bill Number	PFMS Bill Date	Voucher Number	Voucher Date	PFMS Transaction ID
Late. M MORAB	802018099100162	CP00000080	2018-10-24	V50	24/10/2018	S091701005454
Mr. MANOJ KUMAR	802018069200167	CP00000081	2018-10-24	V51	24/10/2018	S091701005456
Mr. NAGESHWAR BAGDI	802017109200169	CP00000082	2018-10-24	V52	24/10/2018	S091701005458
Mr. NARENDRA SINGH	802018091200163	CP00000076	2018-10-24			S091701005445
Mr. NARENDRA SINGH	802018091200163	CP00000075	2018-10-24			S091701005446
Mr. SYED HUSSAIN AFZAL RIZVI	802018032200160	CP00000083	2018-10-24	V53	24/10/2018	S091701005460
Mr. SYED HUSSAIN AFZAL RIZVI	802018032200160	CP00000084	2018-10-24	V54	24/10/2018	S091701005462
Mr. TEJ PAL SINGH	802018079200166	CP00000077	2018-10-24	V49	24/10/2018	S091701005448
Mr. RAMAWTAR YADAV	802018061200159	CP00000073	2018-10-23			S061800009176
Mr. RAMAWTAR YADAV	802018061200159	CP00000074	2018-10-23			S061800009179

The interface also includes a search bar, a status filter set to 'Pending', and a 'Show 10 entries' option. At the bottom, there are pagination controls showing 'Showing 1 to 10 of 37 entries' and buttons for 'Previous', '1', '2', '3', '4', and 'Next'.

Fig.4.16

CHAPTER 5

5. Retiree Module

This chapter deals with Pensioner's login and the steps to fill and submit the form.

5.1 Retiree Dashboard

- Retiring officer/official can see the progress of his/her application at the top of the dashboard (Fig 5.1)
- Milestones completed will be shown in GREEN colour dots and the pending ones with RED colour dots.
- Retiree can see the pensionary benefits and lodge their grievance, if any, using the dashboard.
- Retiree can see his/her pension details by clicking on pension ledger.

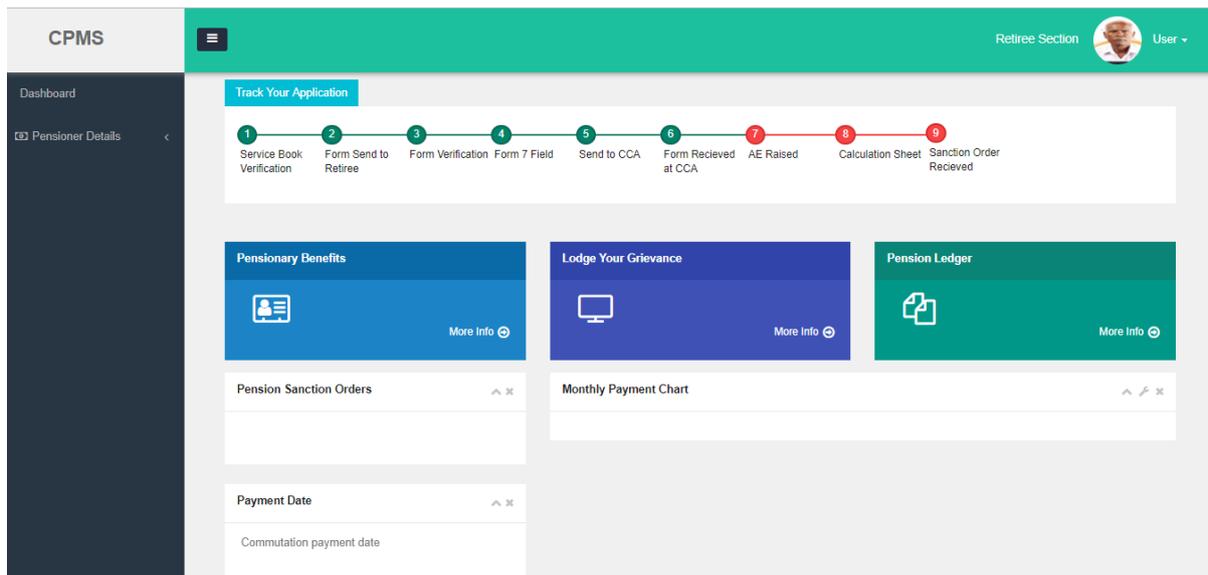


Fig 5.1

5.2 Fill & Submit Forms

Retiree can fill the forms by following the following steps:

5.2.1 Pensioners Details

- Pensioner/Retiree should login into CPMS using PAN and Password received on SMS (NOTE: In case of Family Pension the Retiree Profile will be created by the SSA office itself). **Click on Pensioners Details >> Profile.** Fig 5.2

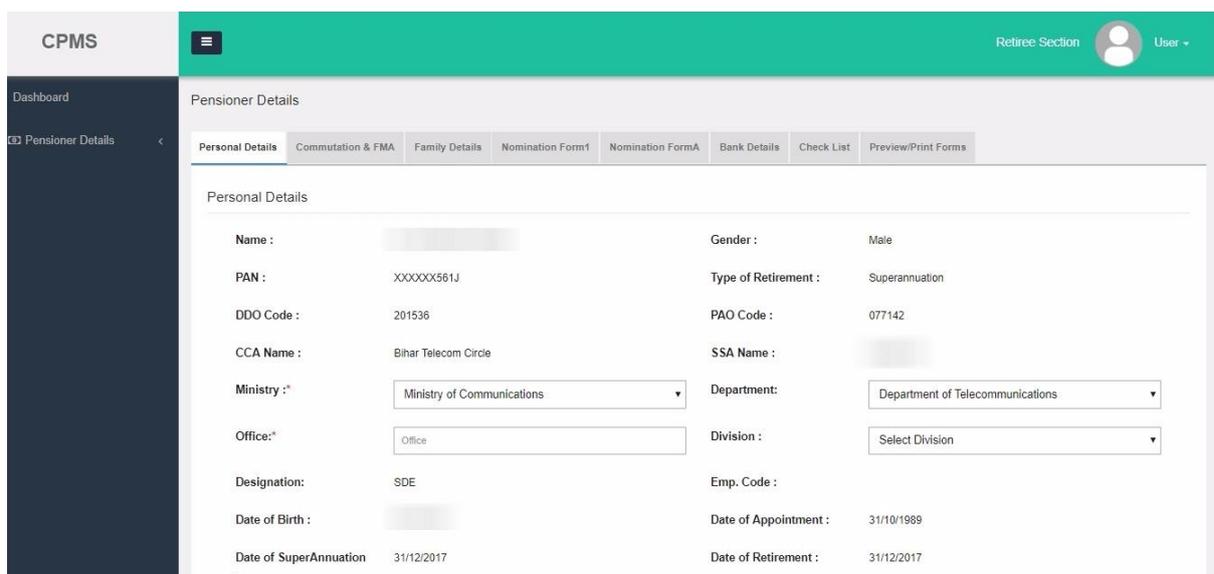


Fig 5.2

- Few details will be pre-populated in the profile of the retiree and rest of the details will be filled by the retiree (In case there is any discrepancy in the pre-populated details of the retiree, he/she may write to SSA unit and get the same rectified).

Personal Details Tab:

- Click on Personal Details Tab and fill the same. After filling the same click on Save button and move on to next tab 'Commutation and FMA'. Fig 5.3



Father's/Husband's Name : Mothers Name:

I consent the use of my Aadhaar number for the purpose of establishing the identity and generation of Annual Digital Life Certificate for Pension. The Aadhaar Number will be shared with O/o CCA, DOT(PDA). :

Email : Alternate Email:

Mobile No. : Height (in cm) :*

Blood Group : Do you have family :

Aadhaar No. :

Present Address

State :* District :*

City :* Address :*

Pincode :*

Same As

Permanent Address

State :* District :*

City :* Address :*

Pincode :*

Personal Identification Marks :*
 1. 2.

Indicate whether the family pension is admissible from any other source:

Upload scanned image of photograph
 Note: Size should not exceed 70 KB!! Only .JPEG,.JPG file is allowed :

Upload scanned image of signature
 Note: Size should not exceed 70 KB!! Only .JPEG,.JPG file is allowed :

Upload scanned image of joint photograph
 Note: Size should not exceed 70 KB!! Only .JPEG,.JPG file is allowed :

Save & Continue



Fig 5.3

Commutation and FMA Tab:

In this tab user will fill the FMA and Commutation details. The commutation percentage can be maximum 40%. Fig 5.4

In case FMA is applicable, retiree needs to select his/her area of residence as CGHS or non-CGHS. Other requirements may also be filled in.

The screenshot displays the 'Pensioner Details' form in the CPMS system. The 'Commutation & FMA' tab is active. The form contains the following elements:

- Header:** CPMS logo, Retiree Section, and User profile.
- Navigation:** Dashboard, Pensioner Details, Personal Details, **Commutation & FMA**, Family Details, Nomination Form1, Nomination FormA, Bank Details, Check List, and Preview/Print Forms.
- Section:** Commutation & Fixed Medical Allowance.
- Field:** Percentage of superannuation pension desired to be commuted(upto 40%) * (Current value: 0%).
- Note:** *Note: enter 0% for no commutation*.
- Instruction:** Note: Pension forms will be generated automatically on filling the above information.
- Action:** Save & Continue button.

Fig 5.4

Family Details Tab:

- Retiree will fill information about his/her family members in this tab.
- Then the Retiree should fill the nominations, alternate nominees etc. and keep clicking save button to move on to the next tabs. Fig 5.5
- The Retiree should NOT fill his/her own details in this tab.

CPMS Retiree Section User

Dashboard Pensioner Details

Personal Details Commutation & FMA **Family Details** Nomination Form1 Nomination FormA Bank Details Check List Preview/Print Forms

Family Details

Title :* Select First Name :* FIRST NAME
 Middle Name: MIDDLE NAME Last Name: LAST NAME
 Date of Birth :* Date of Birth Relation With Govt. Servant :* Select
 Remarks (If any): Remarks Suffering From Disability :* Select
 Aadhaar No. : Aadhaar No. Identification Mark(If any): Identification Mark
 Address :* Address Marital Status :* Select
 State :* Select District :* Select

City :* City Pincode :* Pincode

Upload scanned image of photograph : Upload a file
 *Note: Size should not exceed 70 KB!! Only .JPEG,.JPG file is allowed.

No Image Available

Note: Married Sons & Daughters are also part of family.

Save

Pensioner Family Details

Name of the family member	Date of birth	Relation With Govt. Servant	Marital Status	Image	Edit/Delete
---------------------------	---------------	-----------------------------	----------------	-------	-------------

Fig 5.5

Nomination Form 1: Fig 5.6

CPMS Retiree Section User

Dashboard Pensioner Details

Personal Details Commutation & FMA Family Details **Nomination Form1** Nomination FormA Bank Details Check List Preview/Print Forms

Common Nomination Form For GRATUITY & GPF(Form 1)

Nomination For :* Please Select

Nominee Details

S.No.	Select Nominee	Percentage share to be paid	Contingencies on happening of which nomination shall become invalid
1	Please Select	%Percentage	Contingence Detail

Save

Nomination Details

S.No.	Nominee Name	Nomination For	%age share to be paid	Alternate Nominee(If any)	Contingencies on happening of which nomination shall become invalid	Action
-------	--------------	----------------	-----------------------	---------------------------	---	--------

Fig 5.6

Nomination Form A Fig 5.7

Fig 5.7

Bank Details Tab:

Retiree will fill the bank details in this tab. He/she should be careful while entering these details as this is important information for the pension disbursement. Fig 5.8

- After filling the bank details, bank undertaking will be printed (button provided on screen as **Print Bank Undertaking**). Pensioner will himself/herself sign the same and also get signed from bank authorities. Retiree will then upload the signed Bank Undertaking on CPMS (**upload a file**).

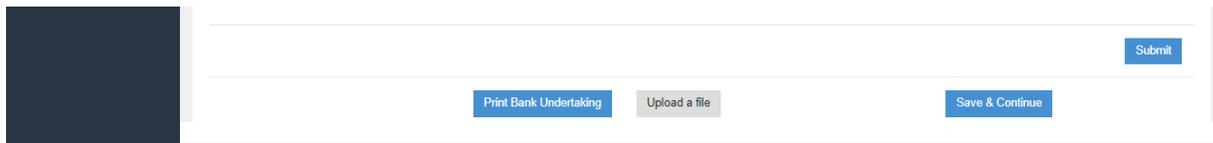


Fig 5.8

IMPORTANT: -Pensioner profile prompts the pensioner to enter bank details. The pension and pensionary benefits of the pensioner will be credited into this account. Therefore, due diligence should be exercised while filling in all important fields like Bank Account no., IFSC code etc. After required, correct information is filled, Bank Undertaking has to be printed and physically signed by Bank authorities and Pensioner, and then uploaded on CPMS.

Check List Tab:

The Retiree will fill the Check List as per the criteria and scenarios. SL. No. 2, 7, 9 cannot be NO. Retiree need to fill them carefully. Fig 5.9

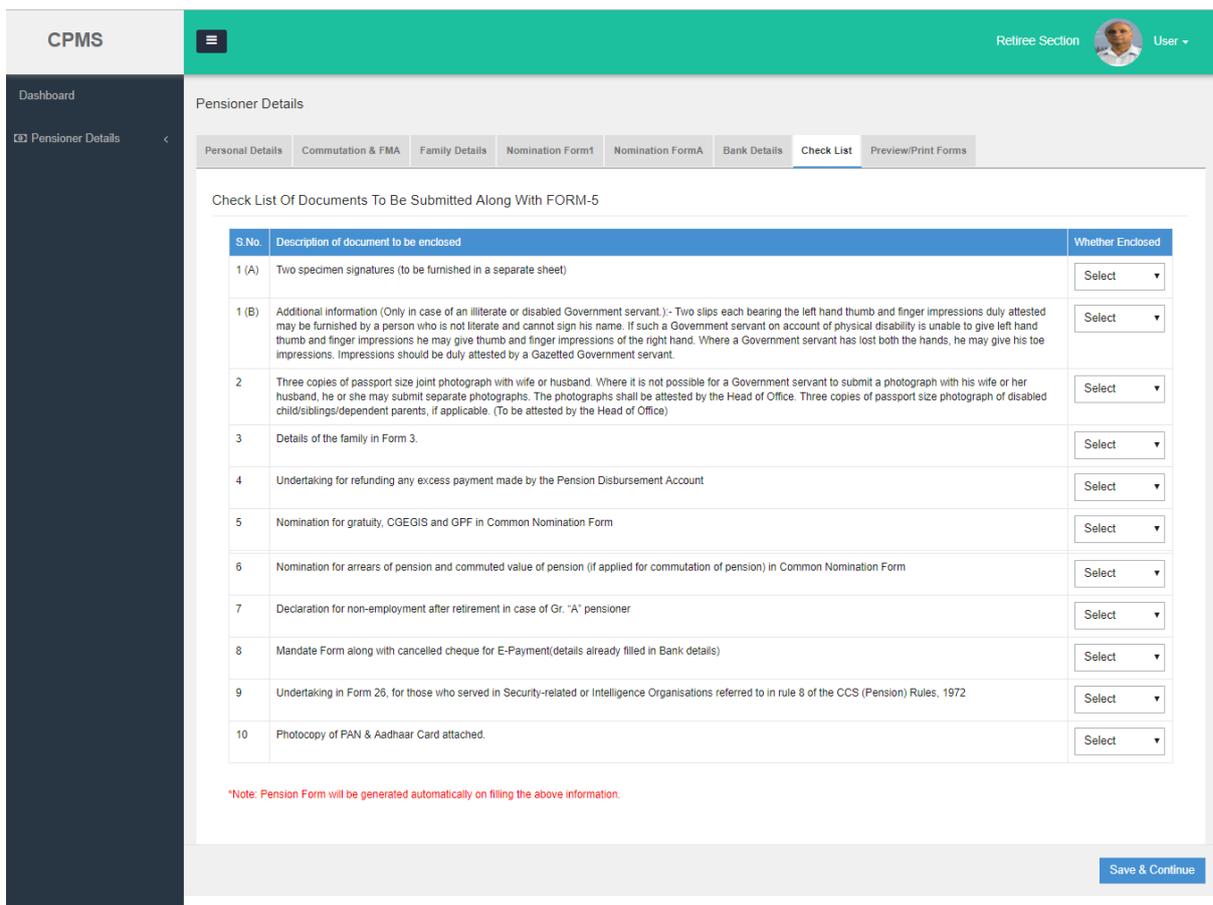


Fig 5.9

***Click on 'Final Submission 'tab whereupon the case will be finally saved.** Once finally submitted, the retiree will **not** be able to change the data. Hence the details should be thoroughly checked before submission. Fig 5.9

The Retiree shall take print out of the forms-form 5, form 3, Nomination forms and Form 1A-and after signing duly submit them with enclosures as mentioned in the checklist of form 5 to HoO.

5.3 Updation of Mobile, Email and address

For updating mobile number, Email or Address of a pensioner after finalisation of retirement benefits, following process will be followed.

The user/pensioner will have to first login using the PAN no. as the Username. After login, click on the profile picture and select the option “Edit Profile” (Fig(5.10)).

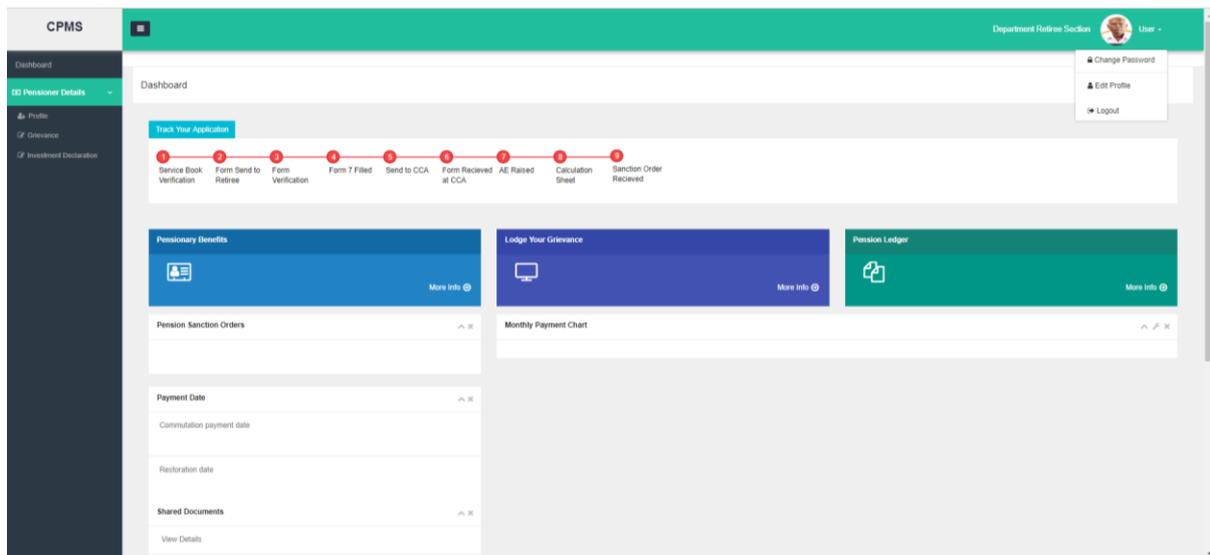


Fig (5.10)

A Pop-up window (Fig(5.11)) will be displayed with the option to choose the following details which the user wants to edit or change: -

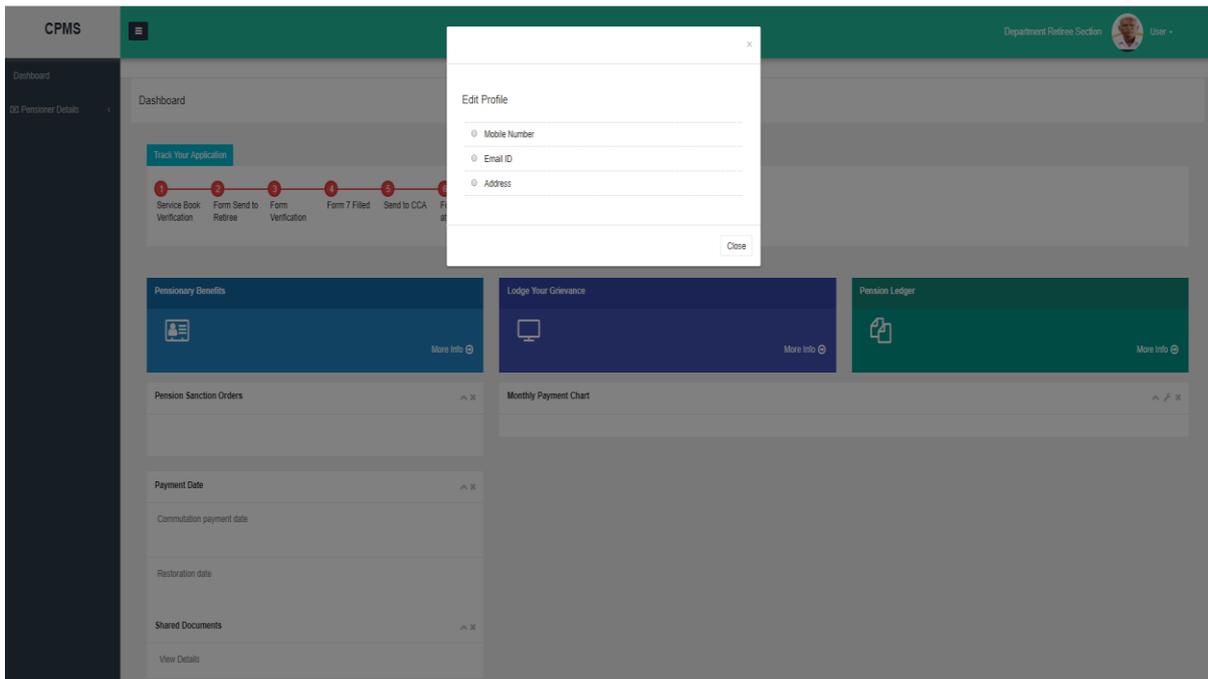
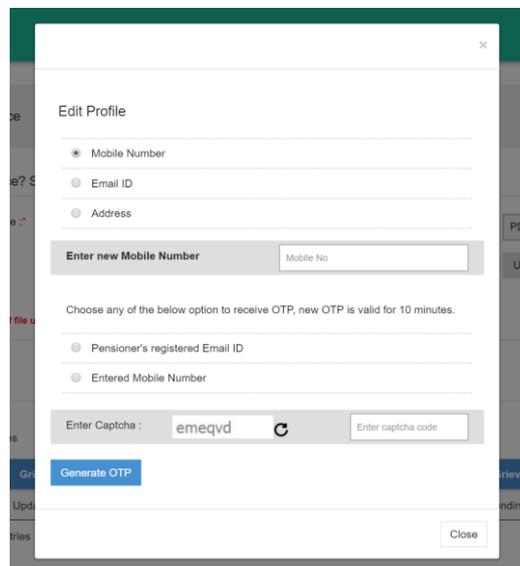


Fig (5.11)

The user has to select the option which he/she wants to change or modify.

5.3.1 Mobile Number Update

Upon selecting 'Mobile Number', the following screen will be displayed (Fig(5.12))



Fig(5.12)

Retiree can enter his/her mobile number and then select either his/her registered email ID or the entered mobile number to receive an OTP to verify the number (Fig (5.12)). Upon receiving the OTP, retiree should enter the OTP (Fig (5.13)) and save which will then update the mobile number.

2
Fol
Re

atic

8
C
S

efit

n C

Save Close

Fig (5.13)

5.3.2 Email ID Update

Upon selecting 'Email ID', the following screen will be displayed (Fig(5.14))

Mobile Number

2
Fol
Re

atic

8
C
S

efit

n C

Save Close

Fig (5.14)

Retiree can enter his/her new email ID and the click on generate OTP which will then send an OTP to the registered mobile number (Fig (5.14)). Retiree should then enter the OTP received and click on save (Fig (5.15)) which would then update the email ID.

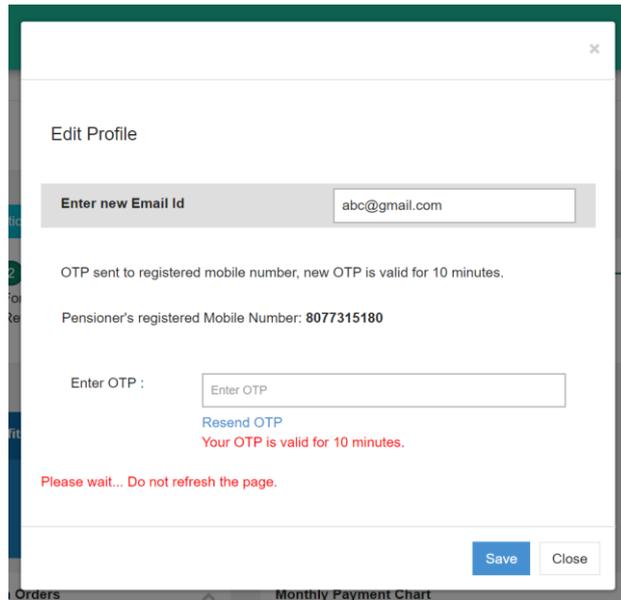


Fig (5.15)

5.3.3 Address Update

To update address, pensioner would be taken to the pensioner grievance page where a grievance related to updation of address can be registered (Fig (5.16)).

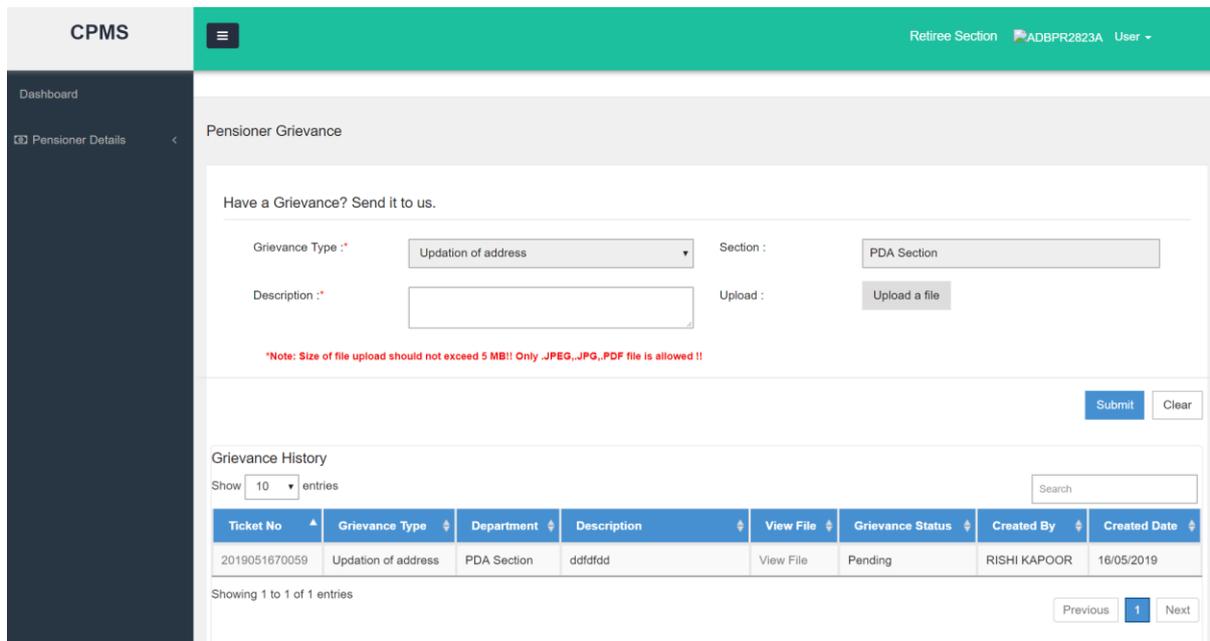


Fig (5.16)

Once such a grievance has been registered, it will be assigned to the respective DH who will then update the address. Uploading of proof of address is mandatory in such case.

5.4 Lodge Grievance

- Retiree can login and raise his/her Grievance related to pension, if any. **Retiree Login→ Pensioners detail→Grievance.**
- Retiree can select the Grievance Type from the dropdown and add the description about it. (Fig 5.17)

The screenshot shows the 'Pensioner Grievance' form in the CPMS system. The sidebar on the left has 'Grievance' highlighted with a red callout '1'. The main form area has a dropdown for 'Grievance Type' with 'Select' as the current value, pointed to by red callout '2'. Below it is a text area for 'Description'. To the right, there is a 'Section' field and an 'Upload' button with 'Upload a file' text, pointed to by red callout '3'. At the bottom right of the form are 'Submit' and 'Clear' buttons. Below the form is a 'Grievance History' section with a search bar and a table with columns: Ticket No, Grievance Type, Department, Description, View File, Grievance Status, Created By, and Created Date.

Fig 5.17

- Retiree can also upload the attachment related to the Grievance, if any. (Fig 5.18)
- After filling all the details, Retiree will click on **Submit** button.(Fig 5.19)

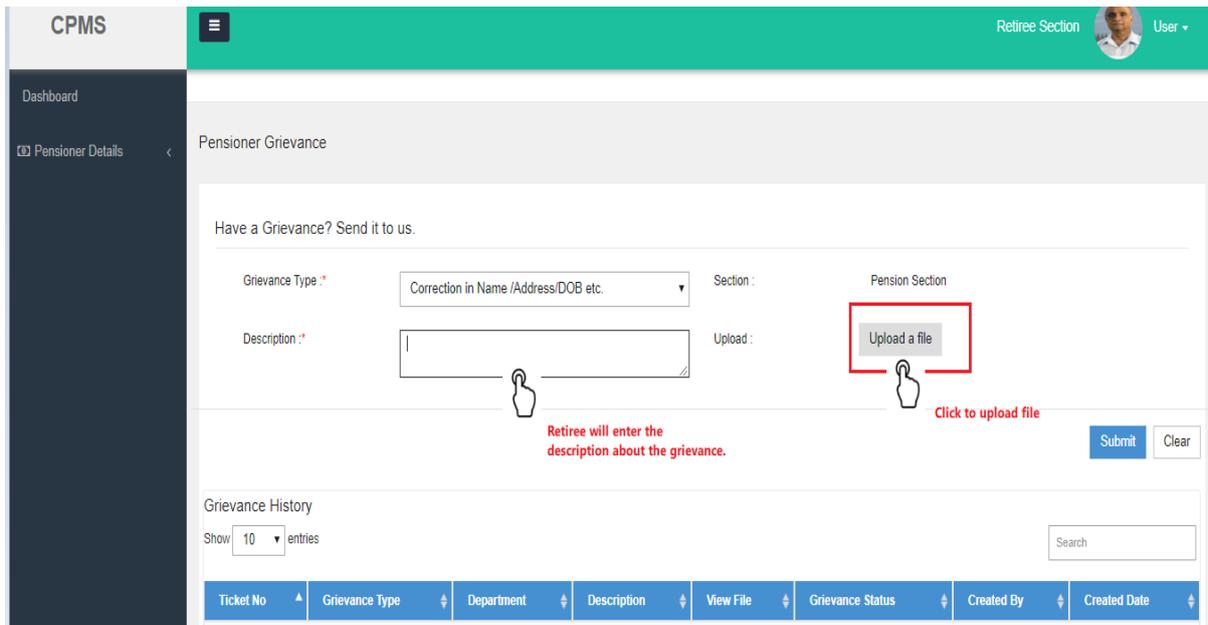


Fig 5.18

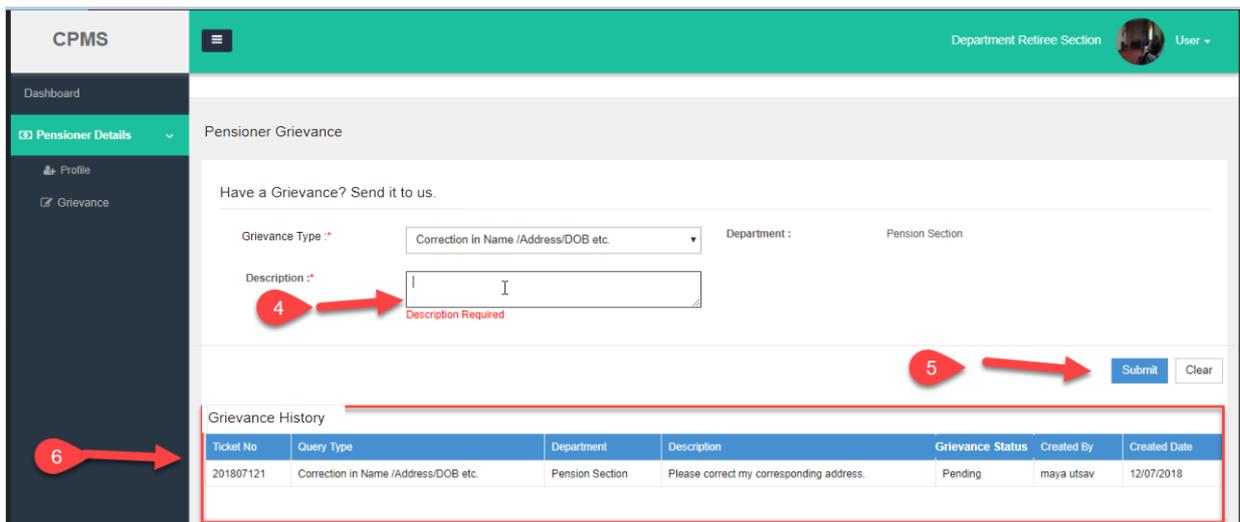


Fig 5.19

Retiree shall be able track the status of his grievance from grievance history.(Fig 5.19)

5.5 View documents and Ledger

Retiree can access ePPO and DCRG sanction along with ledger at any point of time. Also, he can access any corrigendum/revision authority on his dashboard as well. (Fig 5.20)

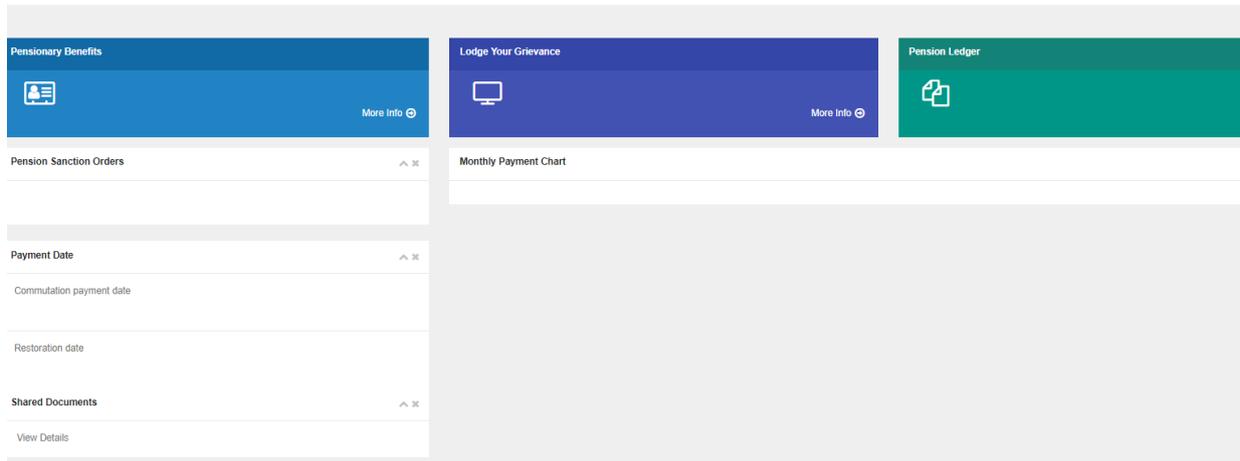


Fig 5.20

5.6. Income Tax Module

5.6.1 Proposed Investment Declaration

Proposed Declaration: All the pensioners drawing pension via SAMPANN are to submit the proposed declaration forms of investment and other information for availing income tax rebate to the respective pension paying branch by 15th April each year. They can submit by filling the online form from their Dashboard or fill a physical copy and send to Concerned CCA office. In case of online filling of proposed form, no physical copy needs to be sent to the CCA office.

The pensioners who fail to submit the proposed declaration in time schedule mentioned above but submit subsequently on a later date, the tax deduction shall get impacted after receipt of the declaration. No proposed declaration would be entertained however after 9th October. After that Actual declaration shall submitted by the pensioner.

Pensioner has to take following steps in order to fill the income tax declaration in SAMPANN application:

1. Pensioner shall open SAMPANN website- www.dotpension.gov.in and login using his/her credentials as screen shown in the below Fig(5.21).

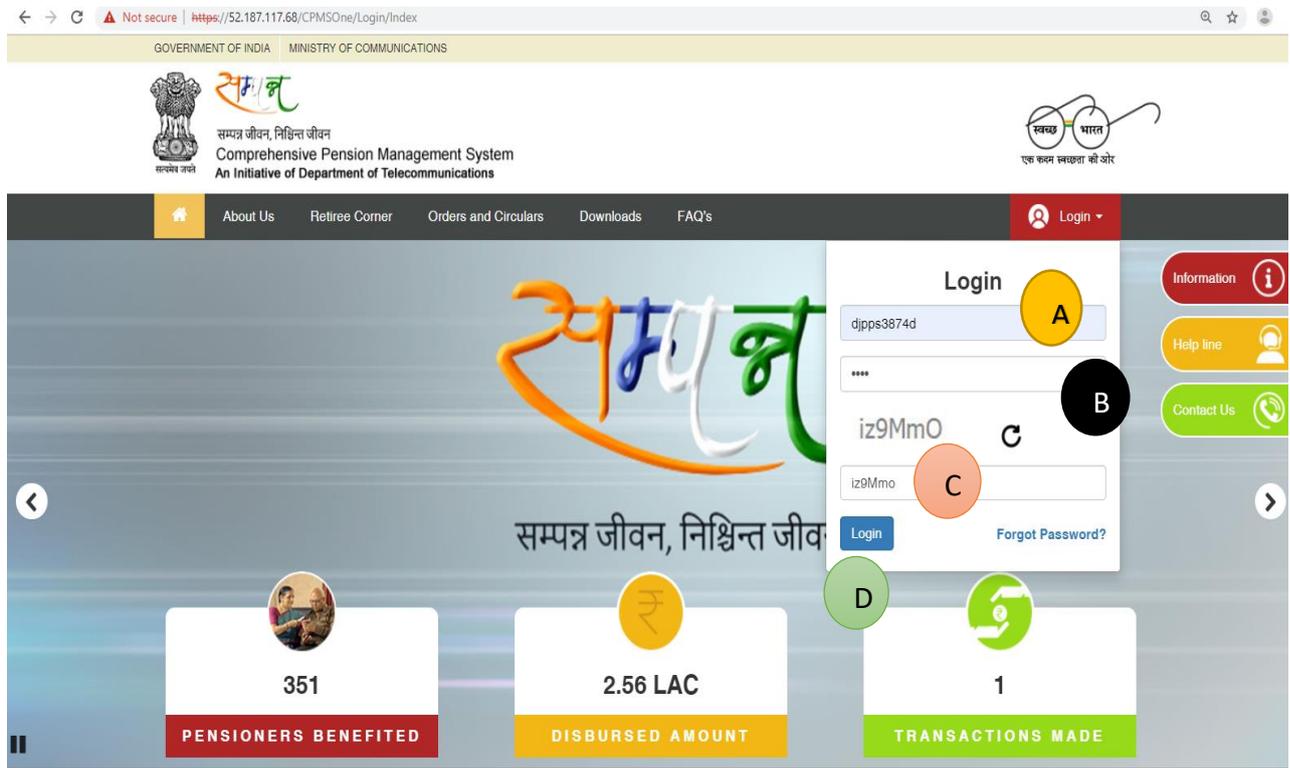
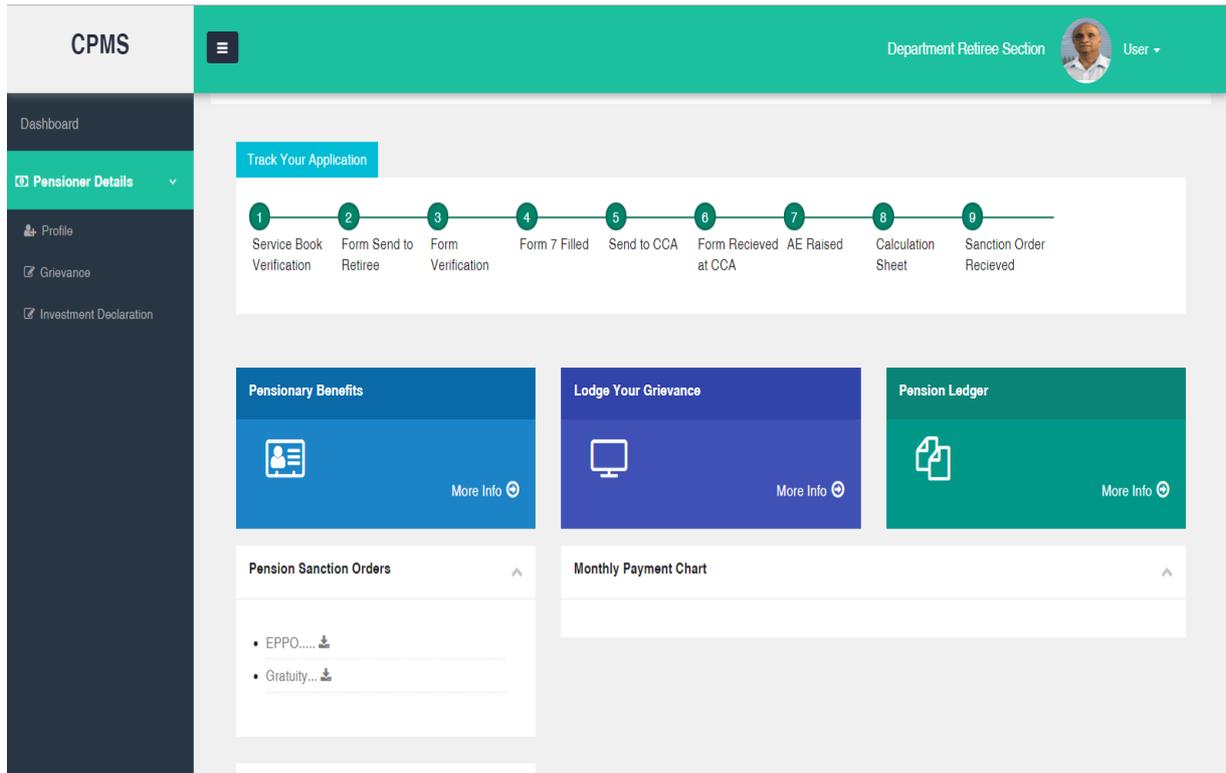


Fig (5.21)

Now Pensioner has to click on the **Pensioner Details-> Investment Declaration** link shown in below Fig (5.22)

Pensioner will have the option to submit proposed declaration or actual declaration.



Fig(5.22)

User has to click on the 1st “Fill Proposed Investment” button shown in Fig (5.23) and fill his proposed investment declarations details.

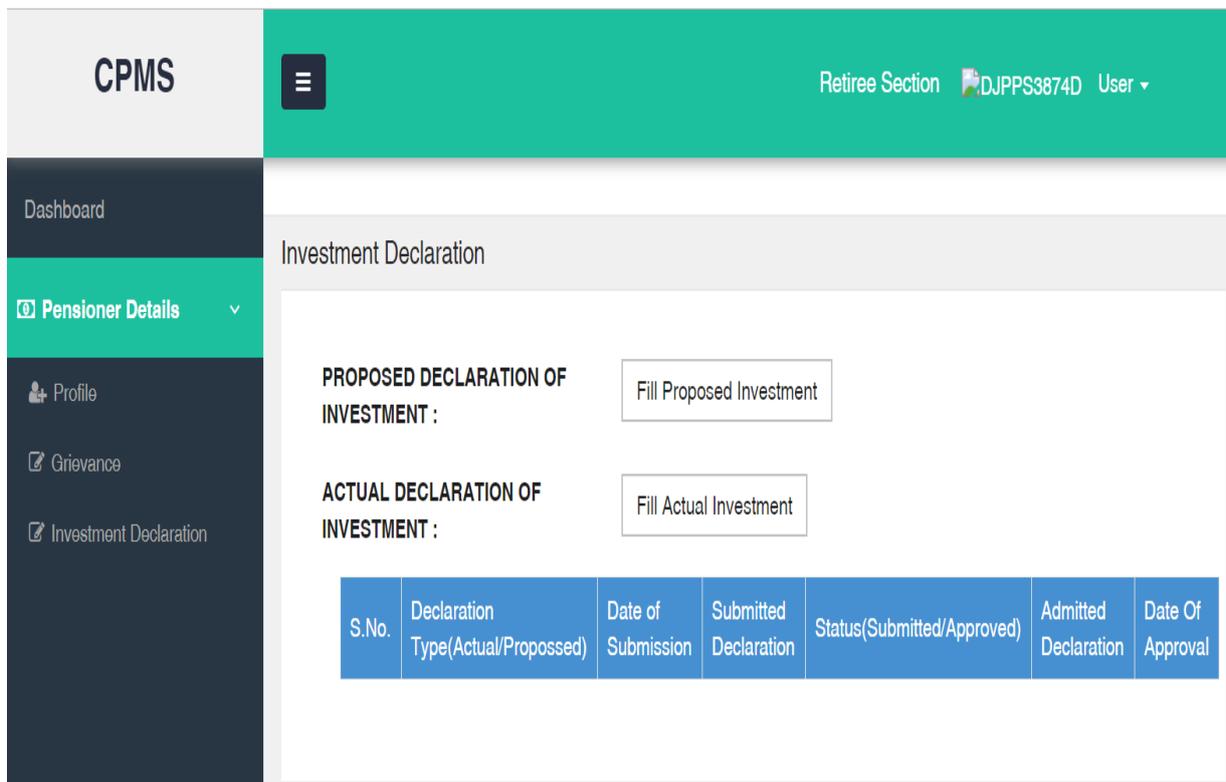


Fig (5.23)

Document upload is not mandatory in case of Proposed Investment Declaration.

Also proposed declaration can be submitted by the pensioner before 15 April. In case multiple declarations are submitted, latest one shall be taken into account. **Fig (5.25)**

CPMS Retiree Section **DUPPS3874D** User

Dashboard

Proposed Investment Declaration ← Back

Pensioner Details

- Profile
- Grievance
- Investment Declaration

Name of the Pensioner : Mr. NARENDRA SINGH

P.P.O No : 802018091200163

PAN No : XXXXXX874D

Assessment Year : 2020-21

Name of the circle : Bihar Telecom Circle

Mobile No. : 8077315107

Income	Amount (Rs.)
(j) Income from Previous Employer:	<input type="text" value="0.00"/>
(k) Tax Deducted Earlier:	<input type="text" value="0.00"/>
(l) Income from Other Sources:	<input type="text" value="0.00"/>
(m) Income from House Property (Income / Loss):	<input type="text" value="Select"/> <input type="text" value="0.00"/>
Total	0.00

A. OTHER DEDUCTIONS UNDER CHAPTER – VI A	Amount of deduction claimed (Rs.)	Document Upload
U/S 80D Medical Insurance	<input type="text" value="2356.00"/>	<input type="button" value="Upload a file"/>
U/S 80D Medical insurance for Senior Citizen	<input type="text" value="1452.00"/>	<input type="button" value="Upload a file"/>
U/S 80DD maintenance of Handicap Dependent	<input type="text" value="1.00"/>	<input type="button" value="Upload a file"/>
U/S 80DDB Medical treatment on specified disease for super senior citizen	<input type="text" value="4.00"/>	<input type="button" value="Upload a file"/>
U/S 80DDB Medical treatment on specified disease for senior citizen	<input type="text" value="4.00"/>	<input type="button" value="Upload a file"/>
U/S 80DDB Medical treatment on specified disease	<input type="text" value="4.00"/>	<input type="button" value="Upload a file"/>
U/S 80E Higher education	<input type="text" value="4.00"/>	<input type="button" value="Upload a file"/>
U/S 80EE Interest on housing loan	<input type="text" value="4.00"/>	<input type="button" value="Upload a file"/>
Donation U/S 80G – 100% scheme (Only for donation to PM/CMLG Relief Fund)	<input type="text" value="4.00"/>	<input type="button" value="Upload a file"/>
Donation U/S 80G – 50% scheme	<input type="text" value="0.00"/>	
U/S 80CCG- deduction in r/o investment in ESS	<input type="text" value="0.00"/>	

PM/CMLG Relief Fund)	4.00	Upload a file
Donation U/S 80G – 50% scheme	0.00	
U/S 80CCG- deduction in r/o investment in ESS	0.00	
U/S 80GG- deduction in respect of rent	7.00	Upload a file
U/S 80QQB-deduction in respect of royalty income	4.00	Upload a file
U/s 80CCB-deduction in r/o investment in ELSS	4.00	Upload a file
U/S 80 TTA – Interest on deposit in Savings account	1.00	Upload a file
U/S 80 TTB– Interest on deposit senior citizen	0.00	
U/S 80U Self Handicap (severe disability and other disability)	0.00	

I have a checked and verified all the declarations made by me.
Note*: Upload of document is not mandatory.

[Save](#)

Fig (5.25)

After entering the Proposed Investment Declarations, the below screen will be shown. Here Retiree can see his filled information by clicking on the **View** link shown in grid under “Submitted Declaration” title shown in Fig (5.26).

CPMS
Retiree Section DJPPS3874D User

Dashboard

Pensioner Details

Profile

Grievance

Investment Declaration

Investment Declaration

PROPOSED DECLARATION OF INVESTMENT : Previous Declaration hasn't been approved yet

ACTUAL DECLARATION OF INVESTMENT : Previous Declaration hasn't been approved yet

S.No.	Declaration Type(Actual/Proposed)	Date of Submission	Submitted Declaration	Status(Submitted/Approved)	Admitted Declaration	Date Of Approval
1	PROPOSED DECLARATION	01/08/2019	View	SUBMITTED		

Fig (5.26)

After click on **View** link below screen will shown **Fig (5.27)**. From this screen Retiree can take the print of this page.

The screenshot shows the 'Investment Declaration' form in the CPMS system. The form is titled 'Investment Declaration' and includes a 'Back' button and a 'Print' button. The form contains the following fields:

Name of the Pensioner :	Mr. NARENDRA SINGH
P.P.O No :	802018091200163
PAN No:	XXXXXX874D
Assessment Year :	2020-21
Name of the circle :	Bihar Telecom Circle
Mobile No. :	8077315107

Income	Amount (Rs.)	Documents
(i) Income from Previous Employer:	4545241.00	No document uploaded
(ii) Tax Deducted Earlier:	0.00	No document uploaded
(iii) Income from Other Sources:	0.00	No document uploaded
(iv) Income from House Property(Loss)	0.00	No document uploaded
Total	(4545241.00)	

B. INVESTMENT UNDER SEC 80C

Fig (5.27)

5.6.2 Actual Investment Declaration

Actual declaration: All the pensioners drawing pension via SAMPANN are to submit the actual declaration forms of investment and other information for availing income tax rebate to the respective pension paying branch by 10th October each year. They can submit by filling the online form from their Dashboard. However, they can also fill a physical copy available on Pensioners' Dashboard and send to Concerned CCA office.

If no actual declaration is received by 10th October then the proposed declaration, if received, shall stand nullified. Also, Actual declaration submitted later will be taken into cognizance in the monthly bills remaining to be processed. Hence, no actual declaration shall be accepted beyond 15th Feb . **Fig (5.28)**

Pensioners should fill Actual declaration of investment as indicated below: - Fig (5.28)

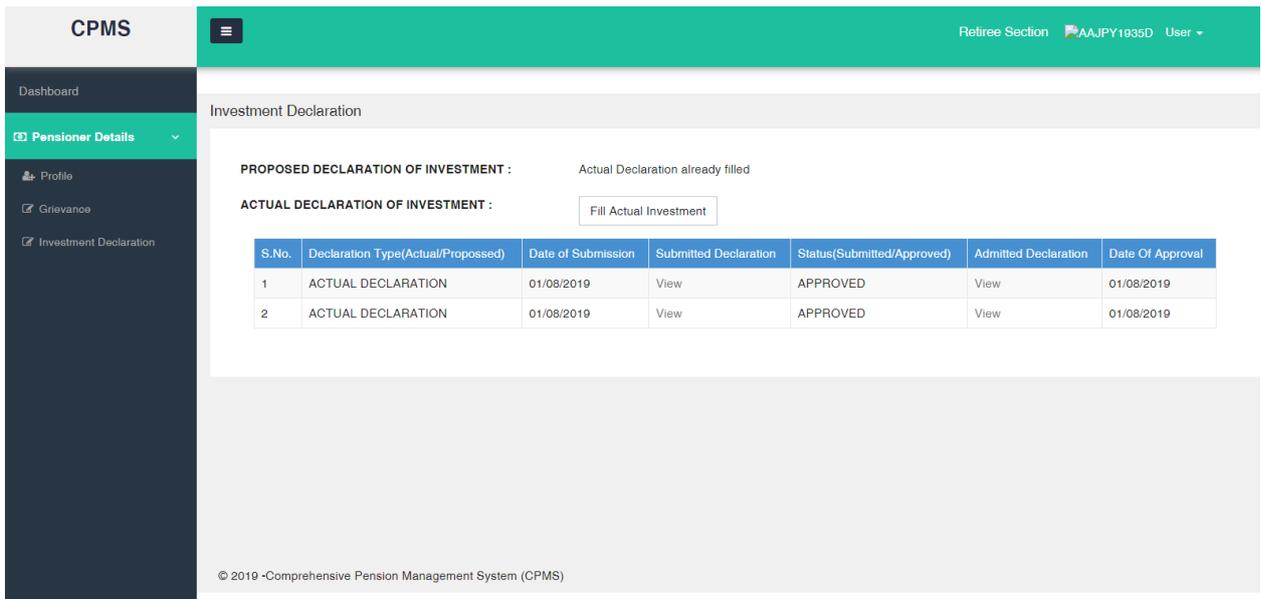


Fig (5.28)

After selecting the Actual Investment Declaration option the following form will appear: -

Fig (5.29)

The form contains the following fields and values:

- Name of the Pensioner : Mr. SAMAY SINGH YADAV
- P.P.O No : 802018096200161
- PAN No : XXXXXX0935D
- Assessment Year : 2020-21
- Name of the circle : Bihar Telecom Circle
- Mobile No. : 8126116995

Income Declaration Section:

Income	Amount (Rs.)	Action
(i) Income from Previous Employer:	100000.00	Upload a file
(ii) Tax Deducted Earlier:	5500.00	Upload a file
(iii) Income from Other Sources:	50000.00	Upload a file
(iv) Income from House Property (Income / Loss):	Select [v] 0.00	

Total	150000.00	
--------------	------------------	--

B. INVESTMENT UNDER SEC 80C

Children Education Tuition Fee :	<input type="text" value="0.00"/>	
Infrastructure Bond(U/S 80CCF) :	<input type="text" value="0.00"/>	
Public Provident Fund (PPF) :	<input type="text" value="120000.00"/>	<input type="button" value="Upload a file"/> <input type="button" value="View"/>
Mutual Fund approved under the Act :	<input type="text" value="0.00"/>	
National Savings Scheme (NSS) :	<input type="text" value="0.00"/>	
National Savings Certificate (NSC) :	<input type="text" value="30000.00"/>	<input type="button" value="Upload a file"/>
FD under Tax Savings Scheme with Scheduled Bank (=>5 years) :	<input type="text" value="0.00"/>	
NSC interest reinvested :	<input type="text" value="0.00"/>	
Housing Loan principal repaid :	<input type="text" value="0.00"/>	
Life Insurance premium paid :	<input type="text" value="0.00"/>	
	<input type="text"/>	

Donation U/S 80G – 100% scheme (Only for donation to PM/CM/LG Relief Fund)	<input type="text" value="0.00"/>	
Donation U/S 80G – 50% scheme	<input type="text" value="0.00"/>	
U/S 80CCG- deduction in r/o investment in ESS	<input type="text" value="0.00"/>	
U/S 80GG- deduction in respect of rent	<input type="text" value="0.00"/>	
U/S 80QQB-deduction in respect of royalty income	<input type="text" value="0.00"/>	
U/s 80CCB-deduction in r/o investment in ELSS	<input type="text" value="0.00"/>	
U/S 80 TTA – Interest on deposit in Savings account	<input type="text" value="0.00"/>	
U/S 80 TTB– Interest on deposit senior citizen	<input type="text" value="0.00"/>	
U/S 80U Self Handicap (severe disability and other disability)	<input type="text" value="0.00"/>	

I have a checked and verified all the declarations made by me.

© 2019 -Comprehensive Pension Management System (CPMS)

Fig (5.29)

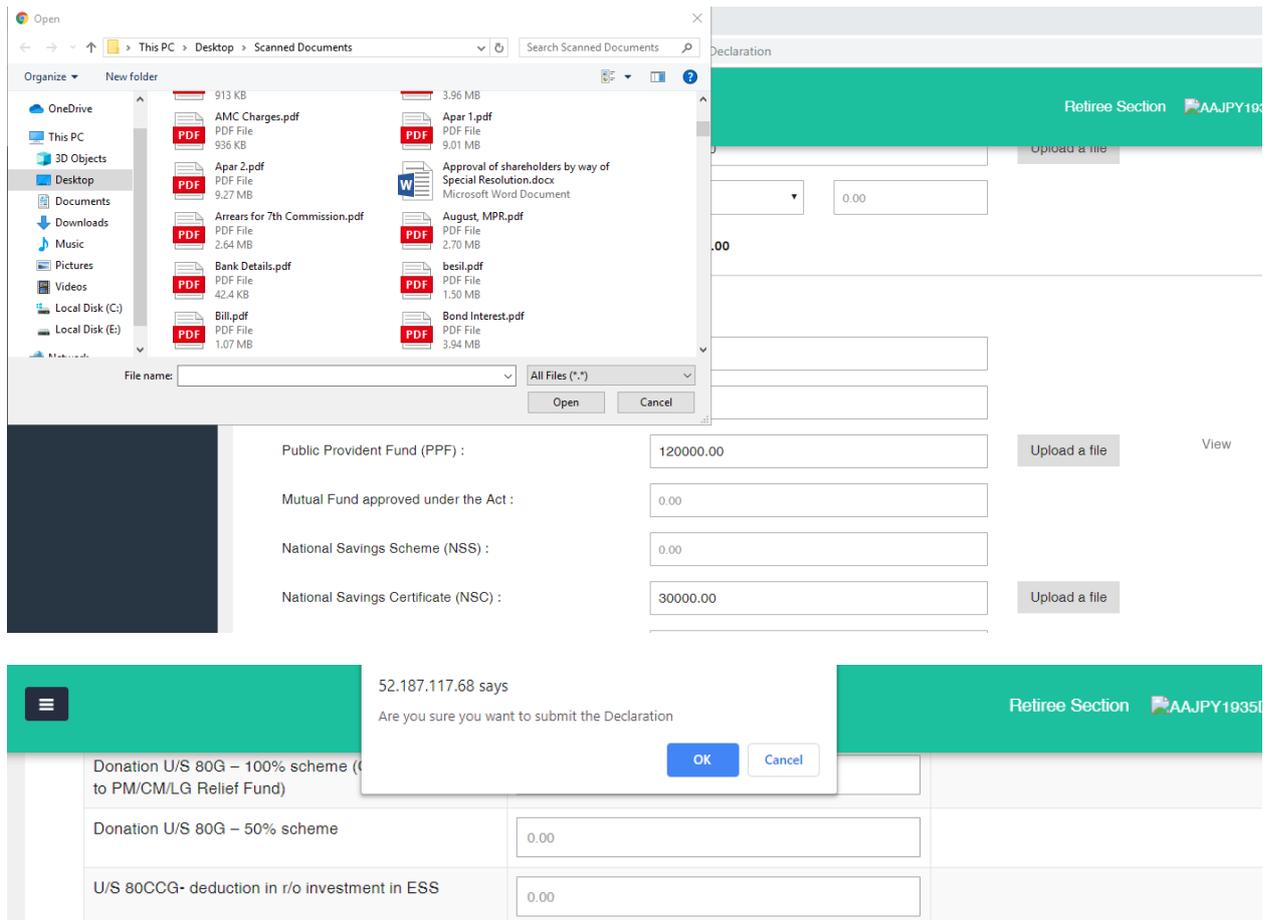


Fig (5.30)

In this Actual investment declaration form, Pensioner may upload proof of investment/savings. All documents required as proof of saving (Investment) should be uploaded. They can be uploaded against each entry or as one file against any one of the fields.

After entering the **Actual Investment Declarations**, the below screen will be shown. Here Retiree can see his filled information by clicking on the **View** link shown in grid under “Submitted Declaration” title shown in **Fig (5.30)**

CPMS

Retiree Section ADBPM3443S User

Investment Declaration

PROPOSED DECLARATION OF INVESTMENT :

ACTUAL DECLARATION OF INVESTMENT :

S.No.	Declaration Type(Actual/Proposed)	Date of Submission	Submitted Declaration	Status(Submitted/Approved)	Admitted Declaration	Date Of Approval
1	PROPOSED DECLARATION	09/07/2019	View	APPROVED	View	09/07/2019

© 2019 -Comprehensive Pension Management System (CPMS)

Fig (5.30)

The proposed /Actual declaration shall be received by CCA Office and there after pensioner may view the admitted declaration. In case of any issue, fresh declaration may be submitted.

The reason for change in submitted & Admitted document shall be available in remarks. It may be noted that fresh declaration can be submitted only when pensioner's last declaration has been admitted.

Proposed/Actual declaration submitted by the pensioner shall be available for view & accounting to PDA section.

Now Retiree can see the Approved Calculation sheet on Dashboard by click on the View link shown in the grid under **"Admitted Declaration"** title shown in Fig 5.30.

CHAPTER 6

6. Grievance Management

This chapter deals with the Grievance Management module, where the Retiree can file his/her Grievance related to pension.

6.1 Pensioner Grievance

- Retiree can login and raise his/her Grievance related to pension, if any. **Retiree Login**→ **Pensioners detail**→**Grievance**.
- Retiree can select the Grievance Type from the dropdown and add the description about it. (Fig 6.1)
- Retiree can also upload the attachment related to the Grievance, if any. (Fig 6.2)
- After filling all the details, Retiree will click on **Submit** button.
- The concerned section in CCA office/HoO will be displayed as shown at point no. 3. (Fig 6.1)

*After submission, the Grievance will be received by Account Officer (AO) of concerned section/HoO as applicable and the history will be maintained in **Grievance History** section. Fig (6.3) point 6.

The screenshot shows the 'Pensioner Grievance' form in the CPMS system. The form has the following elements:

- Header:** CPMS, Retiree Section, User
- Left Sidebar:** Dashboard, Pensioner Details (selected), Profile, Grievance (1), Investment Declaration
- Main Form:**
 - Section: Pensioner Grievance
 - Text: Have a Grievance? Send it to us.
 - Grievance Type: Select (dropdown menu)
 - Description: Text area
 - Section: (dropdown menu)
 - Upload: Upload a file (button)
 - Submit (button) and Clear (button)
- Grievance History:**
 - Show 10 entries
 - Search bar
 - Table with columns: Ticket No, Grievance Type, Department, Description, View File, Grievance Status, Created By, Created Date

Fig 6.1

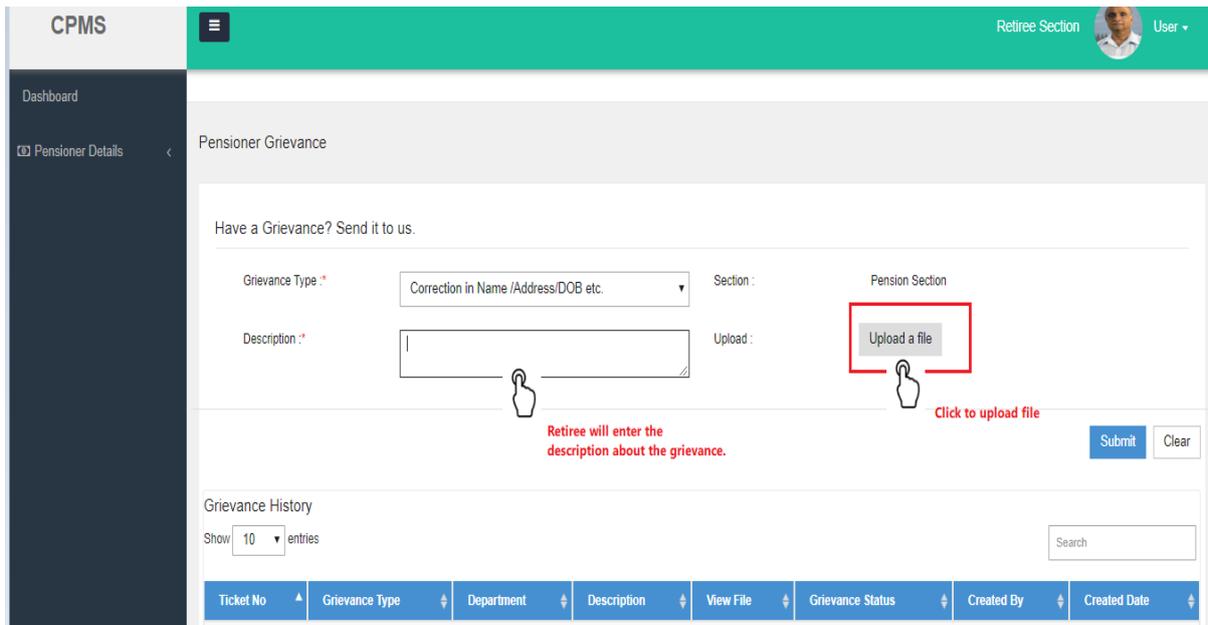


Fig 6.2

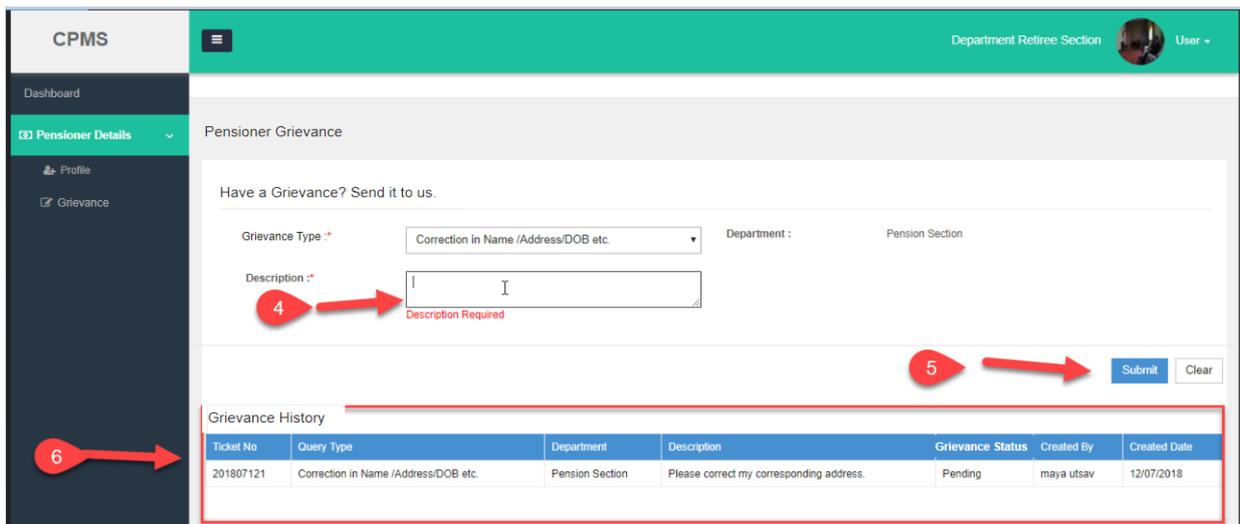


Fig 6.3

6.2 Allotment of Grievance to DH

- Once the Grievance is received at AO (Concerned Section) level, he/she will assign that Grievance to the respective DH (Concerned Section). (Fig 6.4)

- **AO Login→ Grievance Management→ Assign Grievance.**
- AO (Concerned Section) to select the respective DH (Concerned Section) has to click on Grievance check box and then click on **Assign** button. (Fig 6.4)
- After all the aforementioned steps, Grievance will move to respective selected DH (Concerned Section).

Fig 6.4

6.3 Grievance Resolution

- Once the Grievances received at DH (Concerned Section) DH will take the required action on the grievance.
- **DH Login→ Action→ Grievance Management→ Resolve Grievance.** (Fig 6.5)
- However, before settling the grievance, the DH (Concerned Section) should get approval of competent authority in physical file also.
- History of Grievance will be shown in Grievance history with status “Recent” or ‘Settled”.
- AO (concerned section) will be able to see it in Settled Grievance.

**The Pensioner will get Notification on Pensioner Dashboard once the Grievance is settled or any other action taken on the Grievance.*

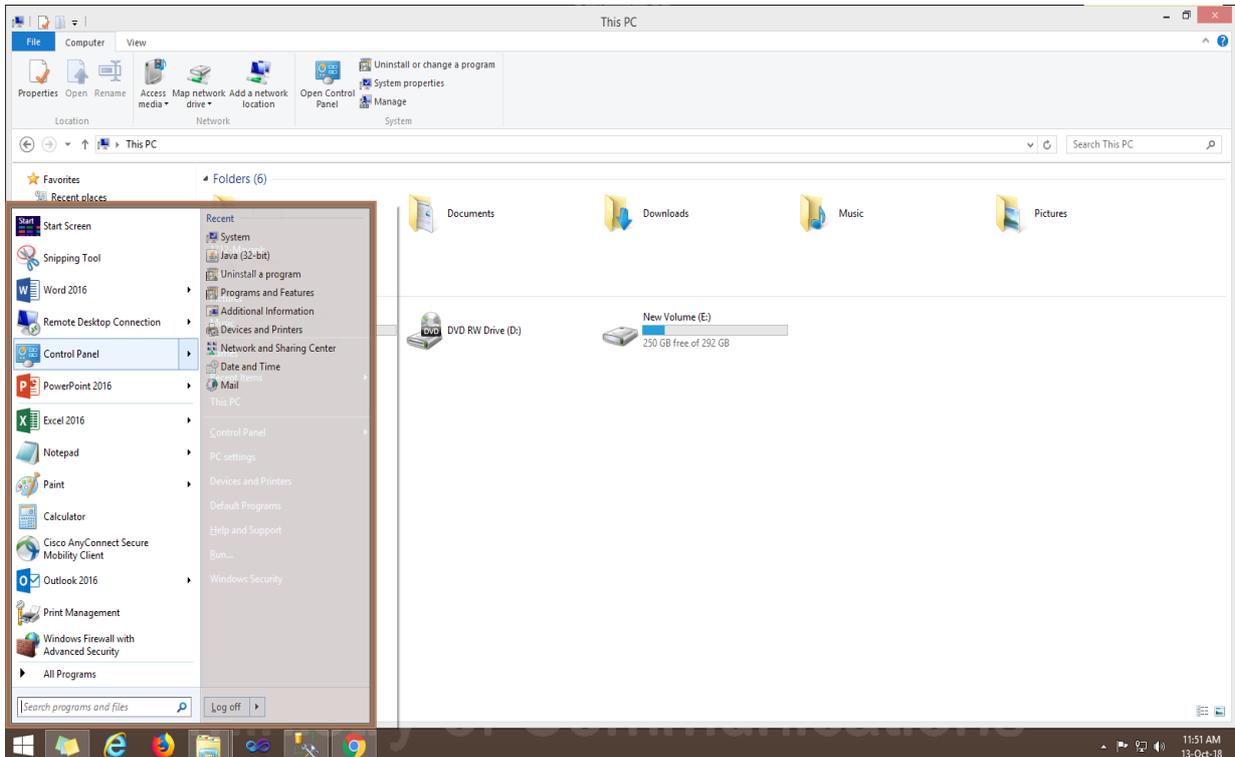
CHAPTER 7

7. DSC Registration

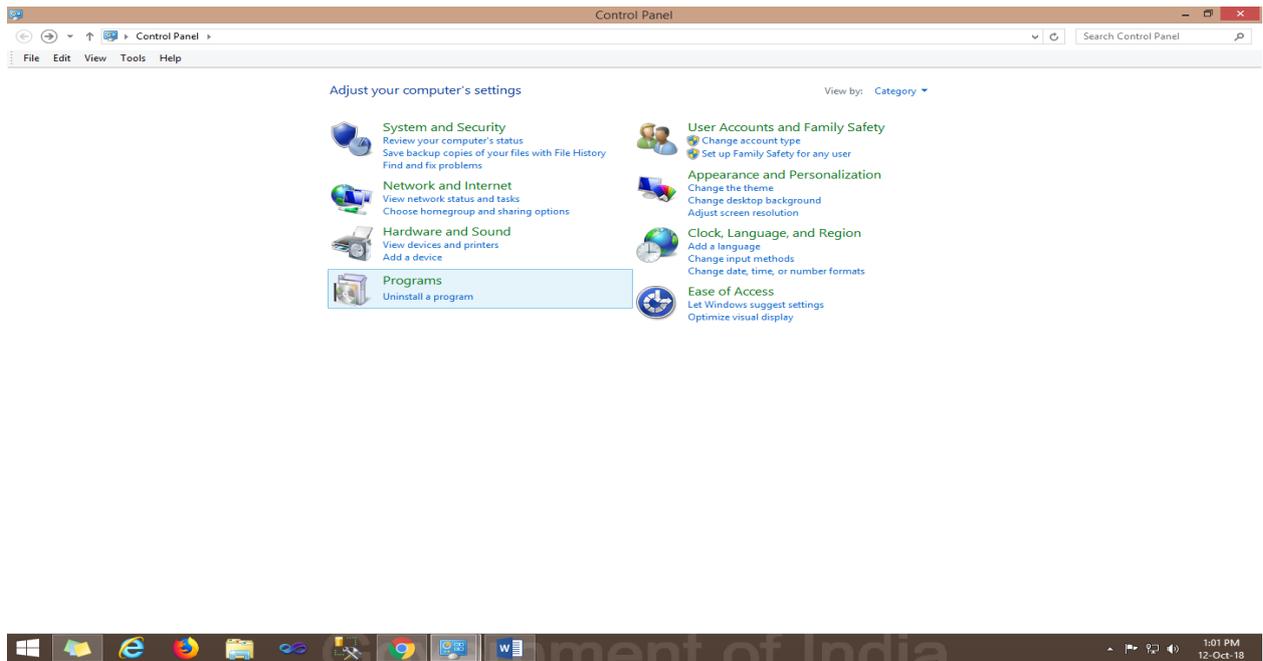
Following steps need to be follow for registering DSC on the System: -

Note: DSC is required only by AO(Pension) in CPMS software. As this configuration is specific to usage of Digital signature in CPMS software only it is advisable to do this configuration only in exclusive computer in which other software using DSC is not used.

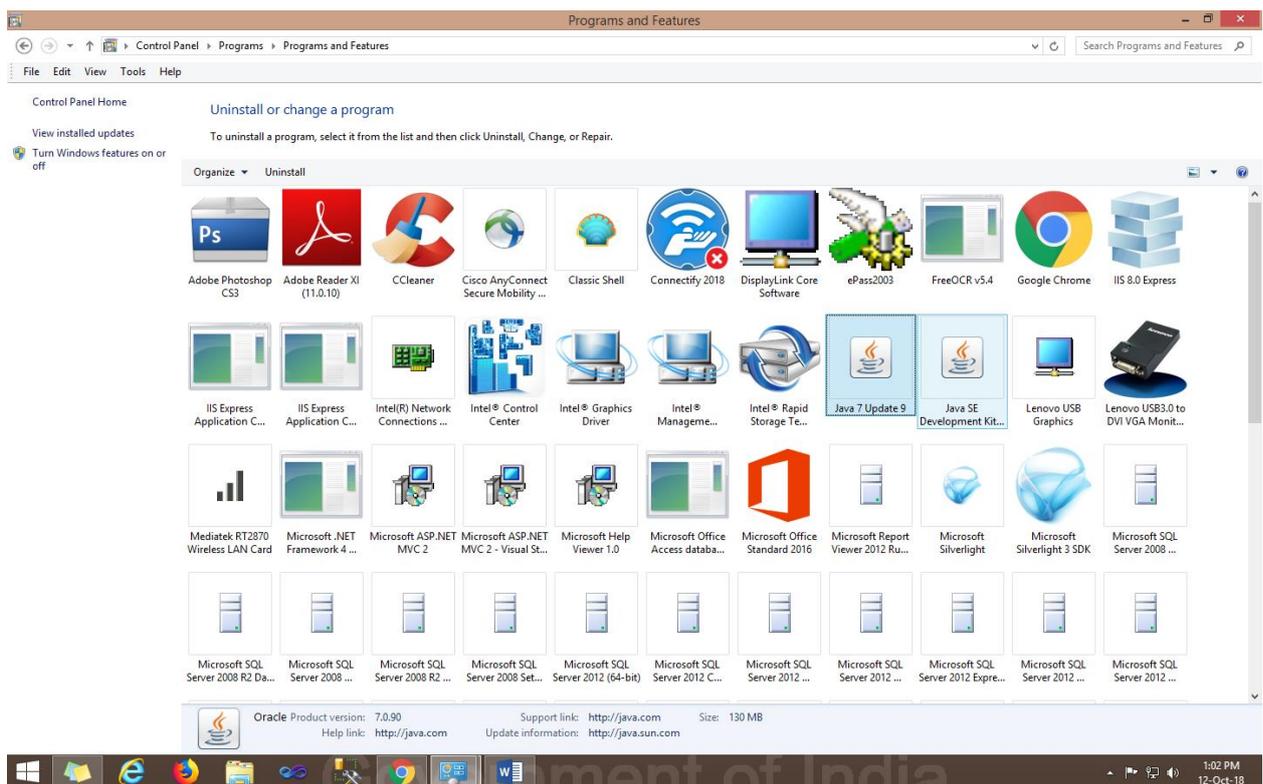
- **Step 1:** Check whether **Java** (any version) is installed in the System or not. In order to check the same, follow the below screenshots. Go to the control panel.



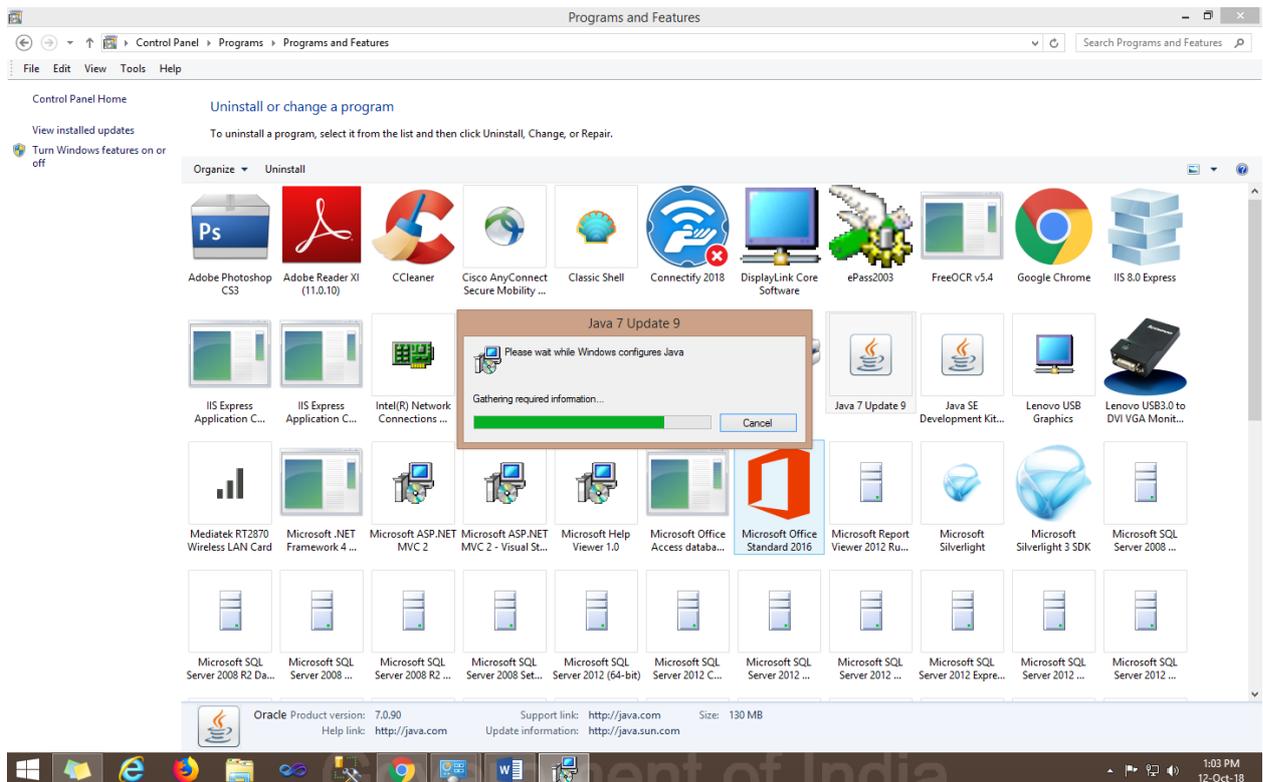
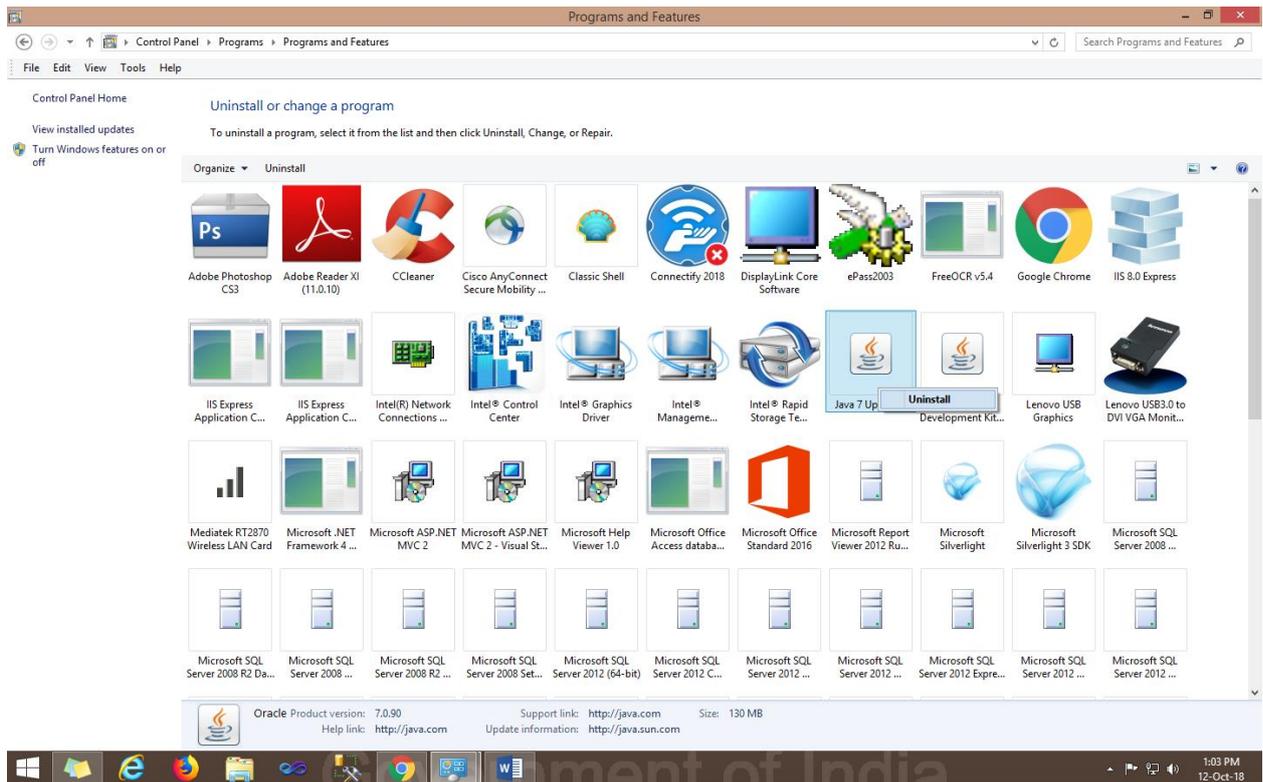
- **Step 2:** Now click on the **Uninstall a Program** link, shown below the program link (highlighted in the below screen)

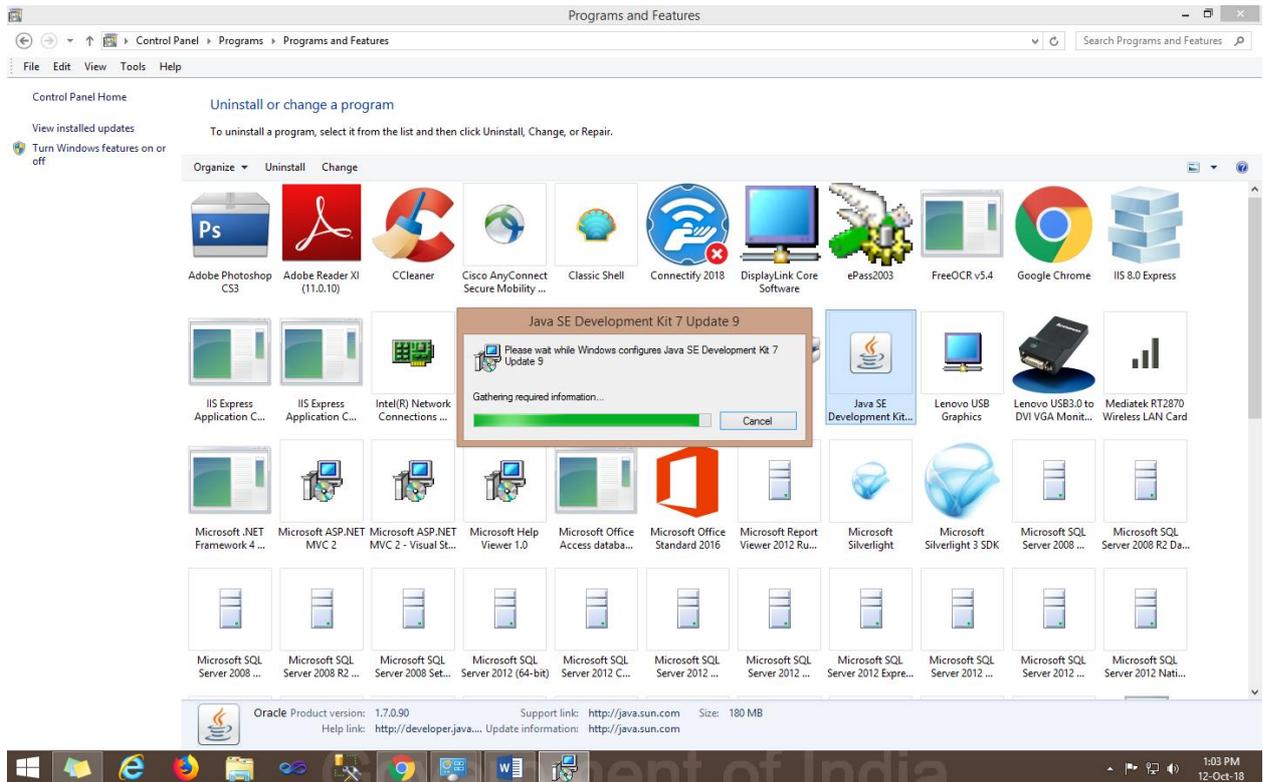
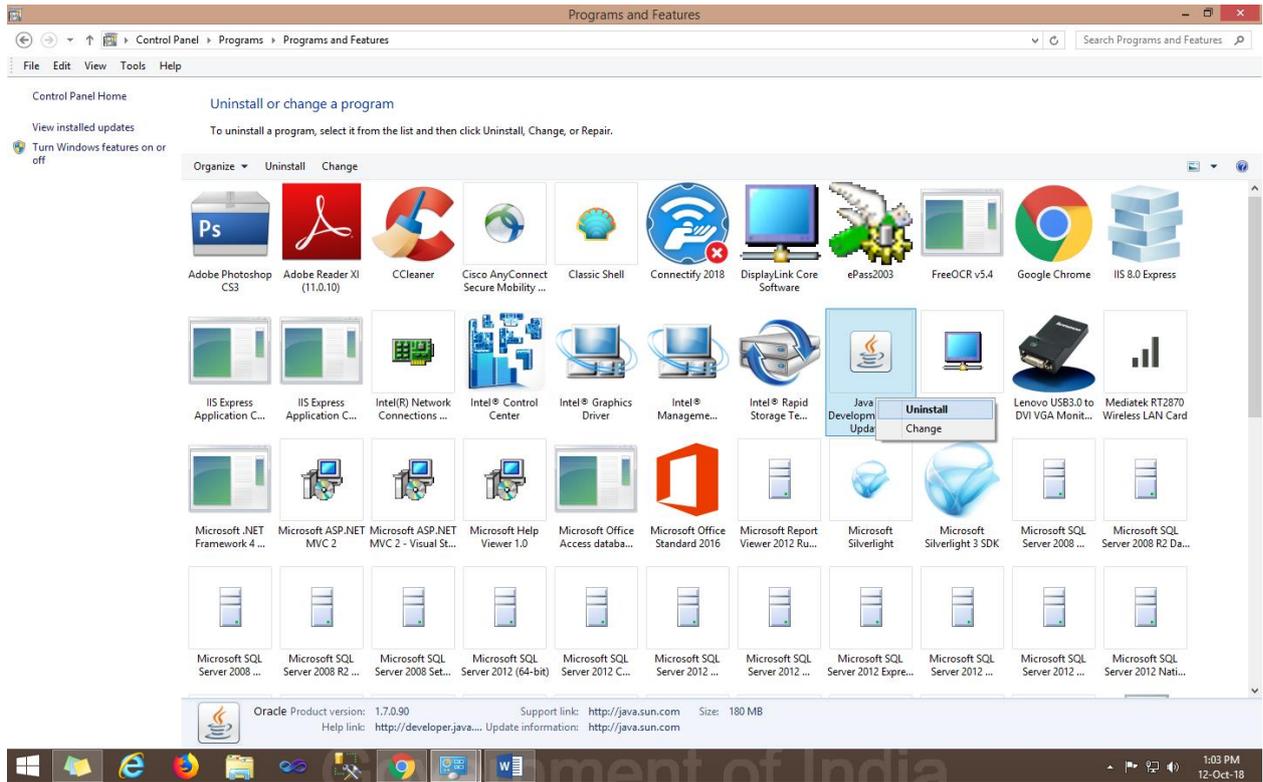


- **Step 3:** If java is already installed in the system, then 2 (or more) icons will be seen as highlighted in the screenshot below. If Java is not installed, then go to Step 5.

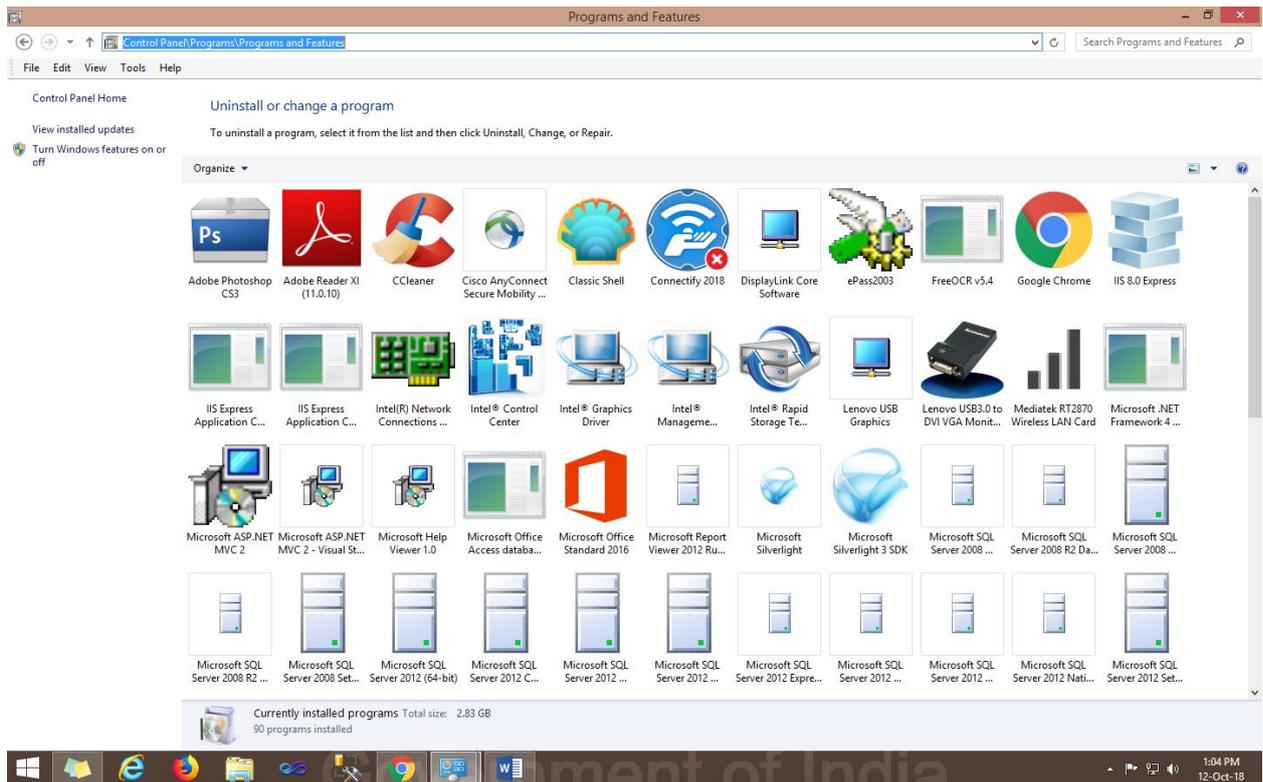


- **Step 4:** Now right click on the icon and you see the Uninstall link, click on the link and uninstall the same. Then you see the below screen.



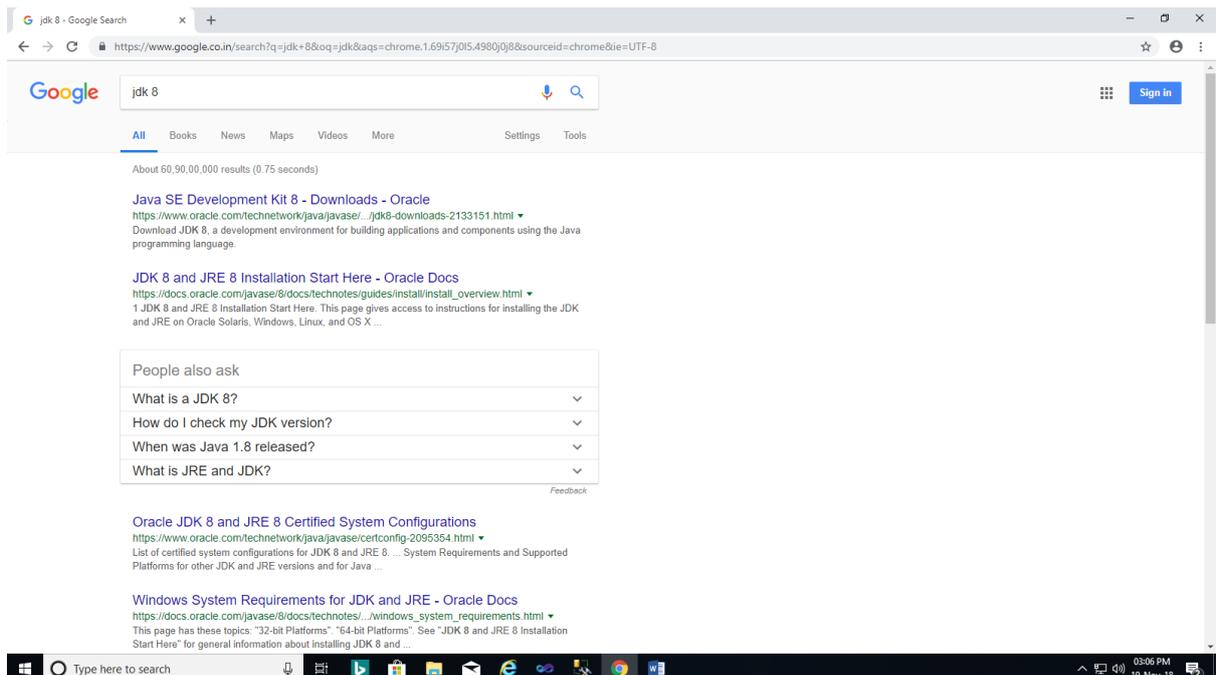


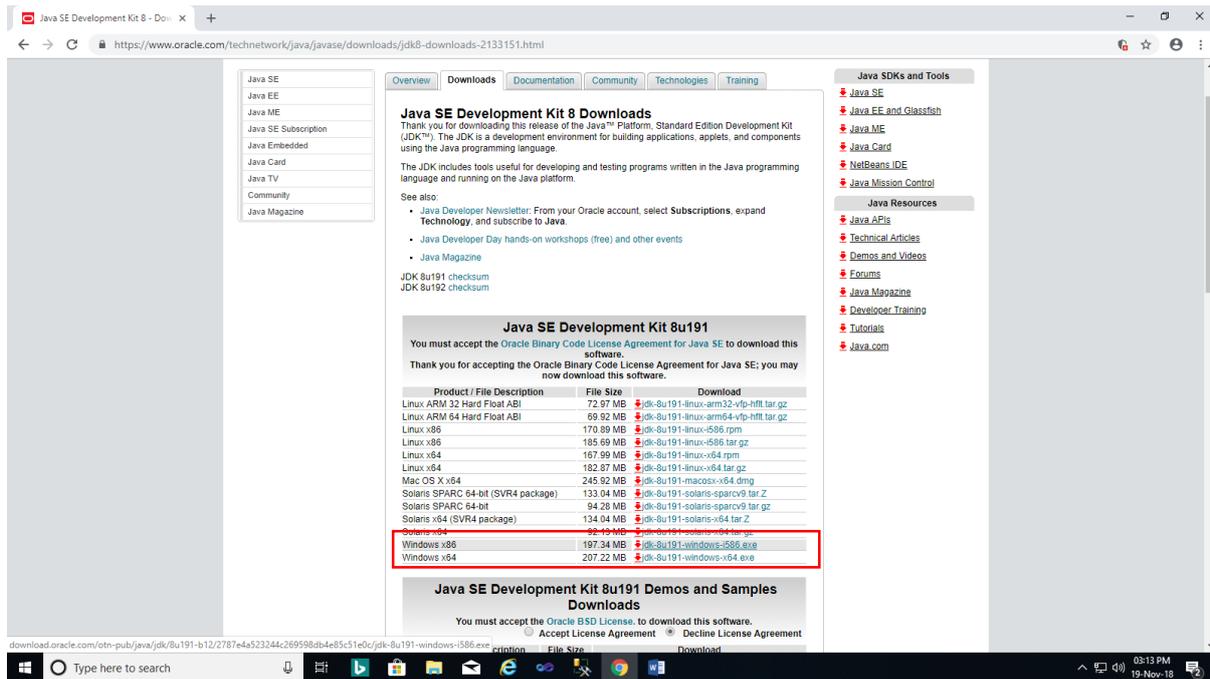
Now after Uninstall, icons are removed and you see the below screen.



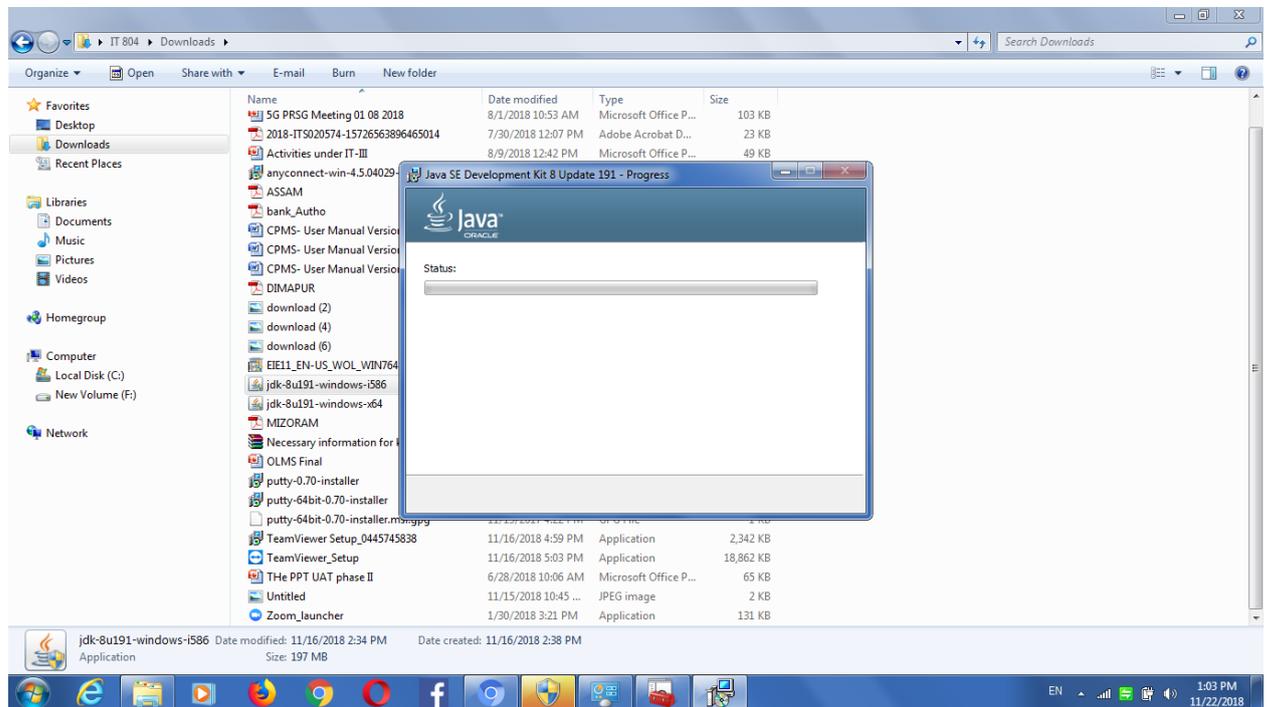
➤ **Step 5:** Now we have to install the latest version of java in the system. For this click on the below link. Under “**Java SE Development Kit 8u191**” download following 2 files “jdk-8u191-windows-i586.exe”(32 bit) (197.34 MB) and “jdk-8u191-windows-x64.exe” (64 bit)(207.22 MB) installer file.

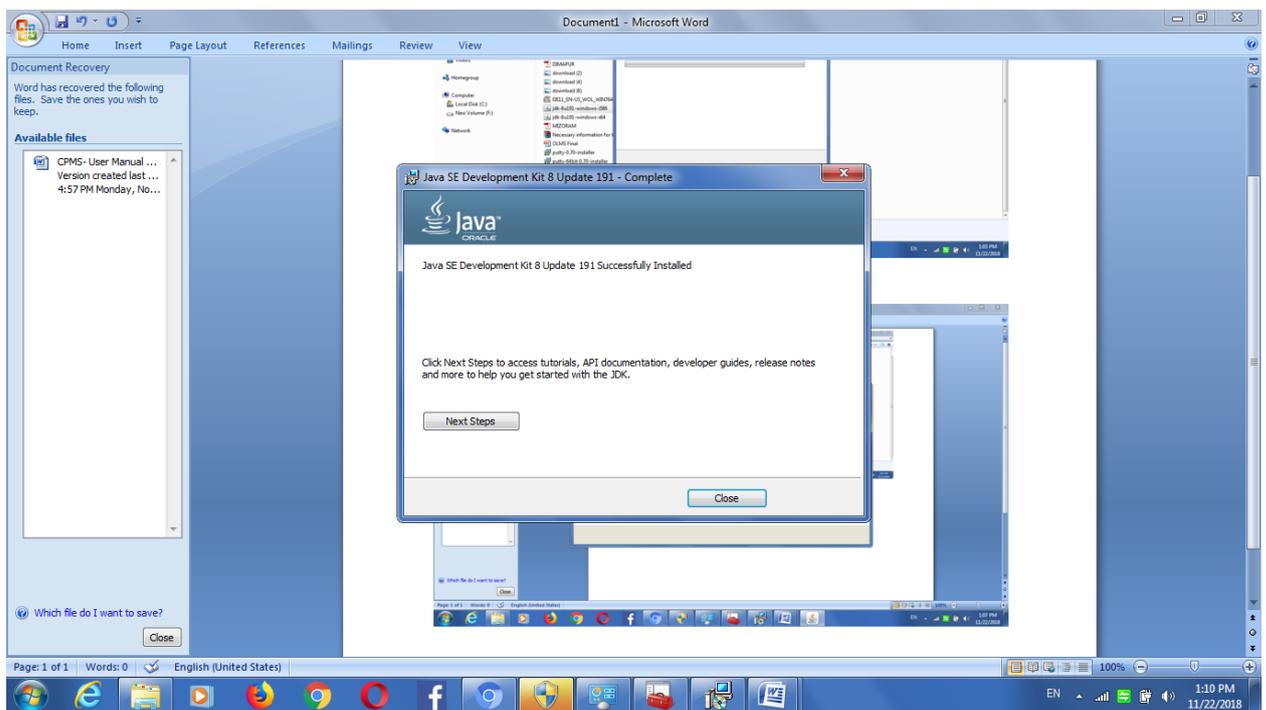
<https://www.oracle.com/technetwork/java/javase/downloads/jdk8-downloads-2133151.html>

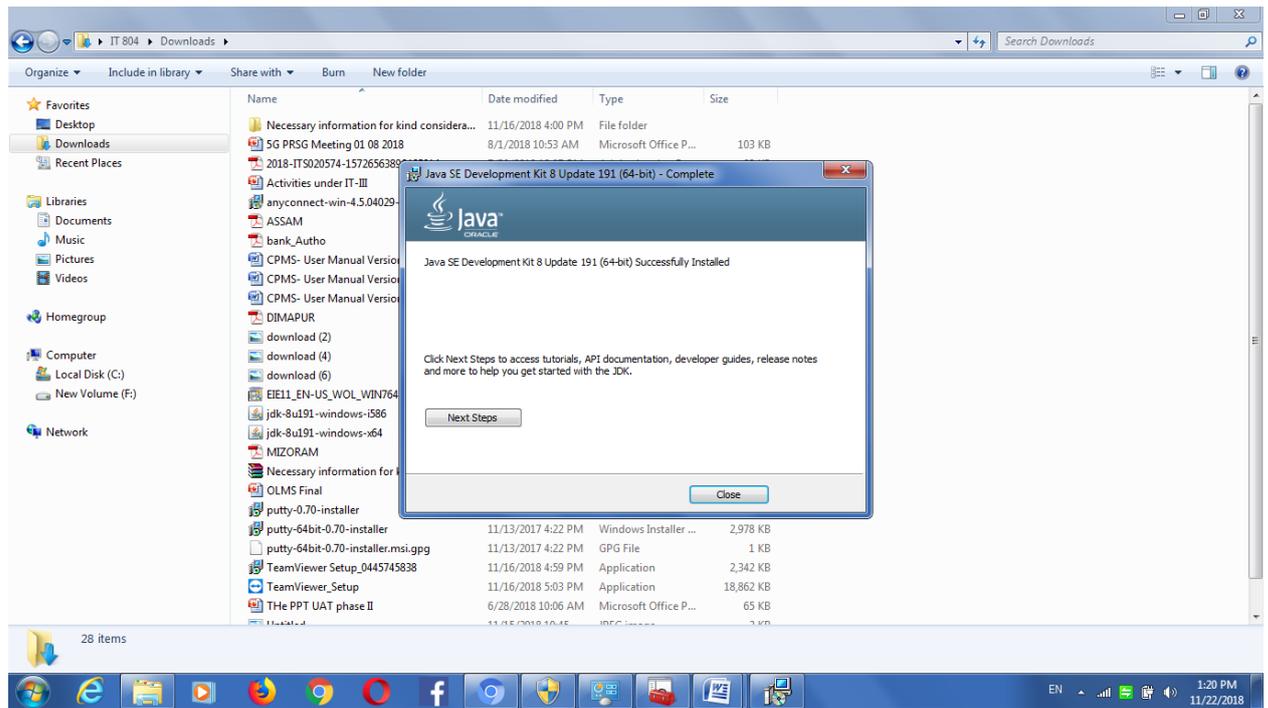




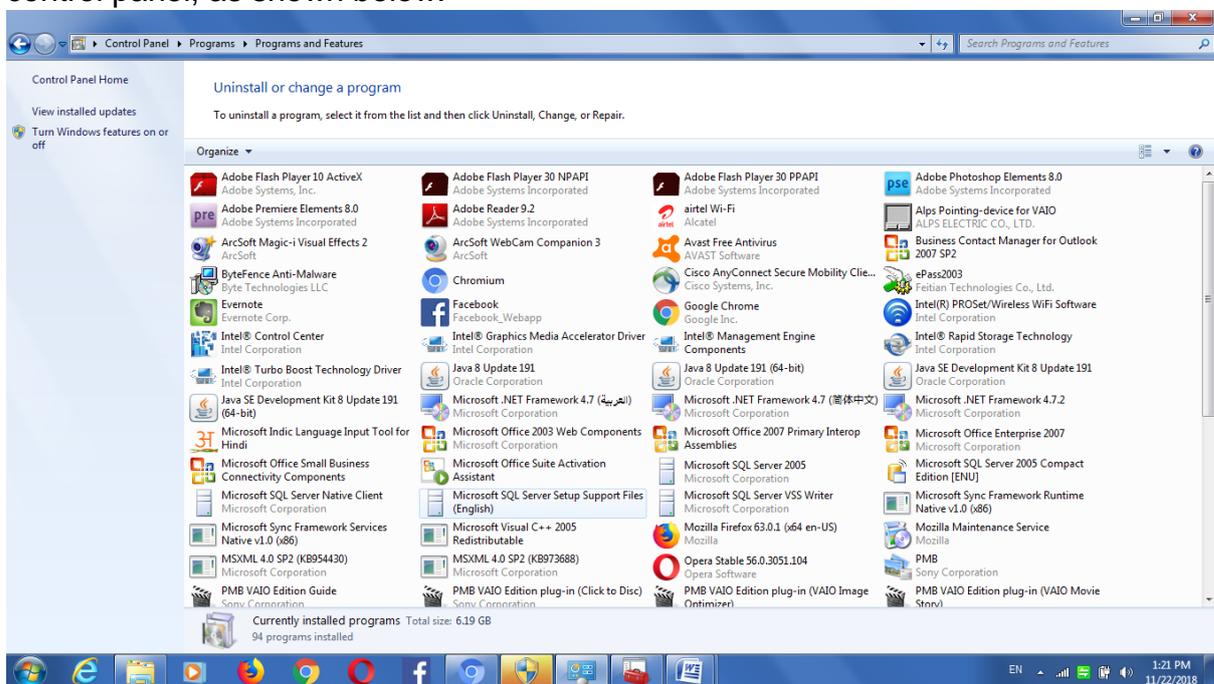
- **Step 6:** Select 'Accept License Agreement' in the dialogue box shown and download the both file mention above and shown in the above screen.
- **Step 7:** Run both the .exe files, one by one, and install the downloaded versions.





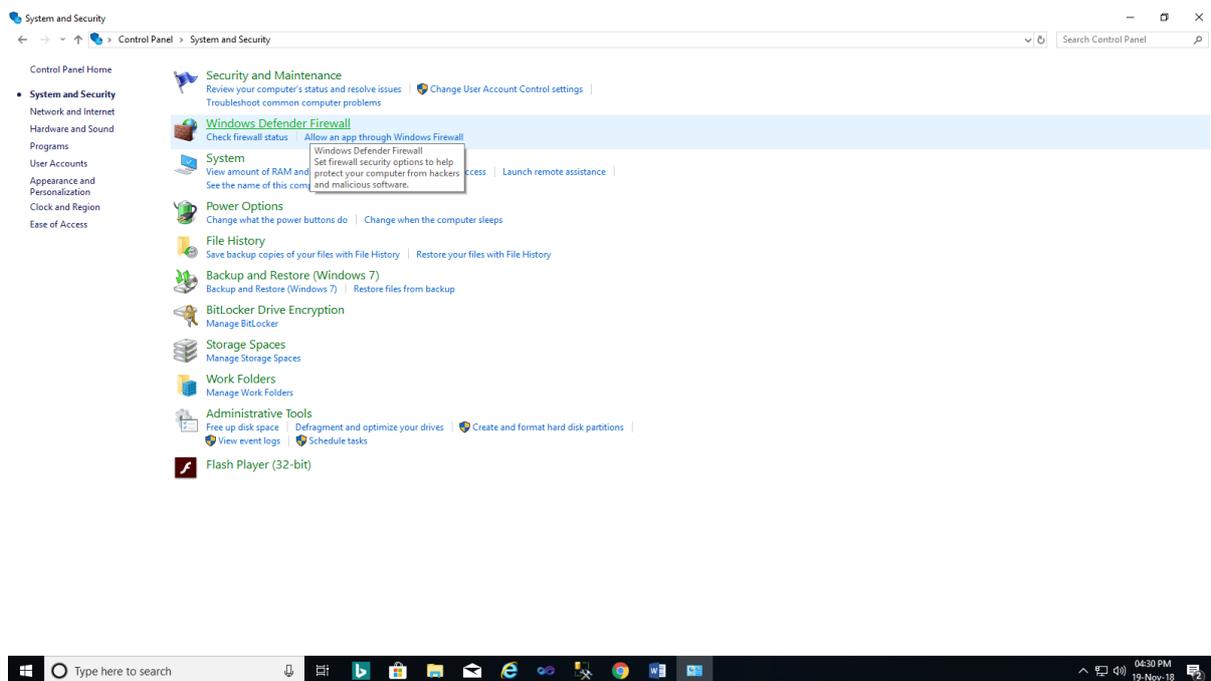
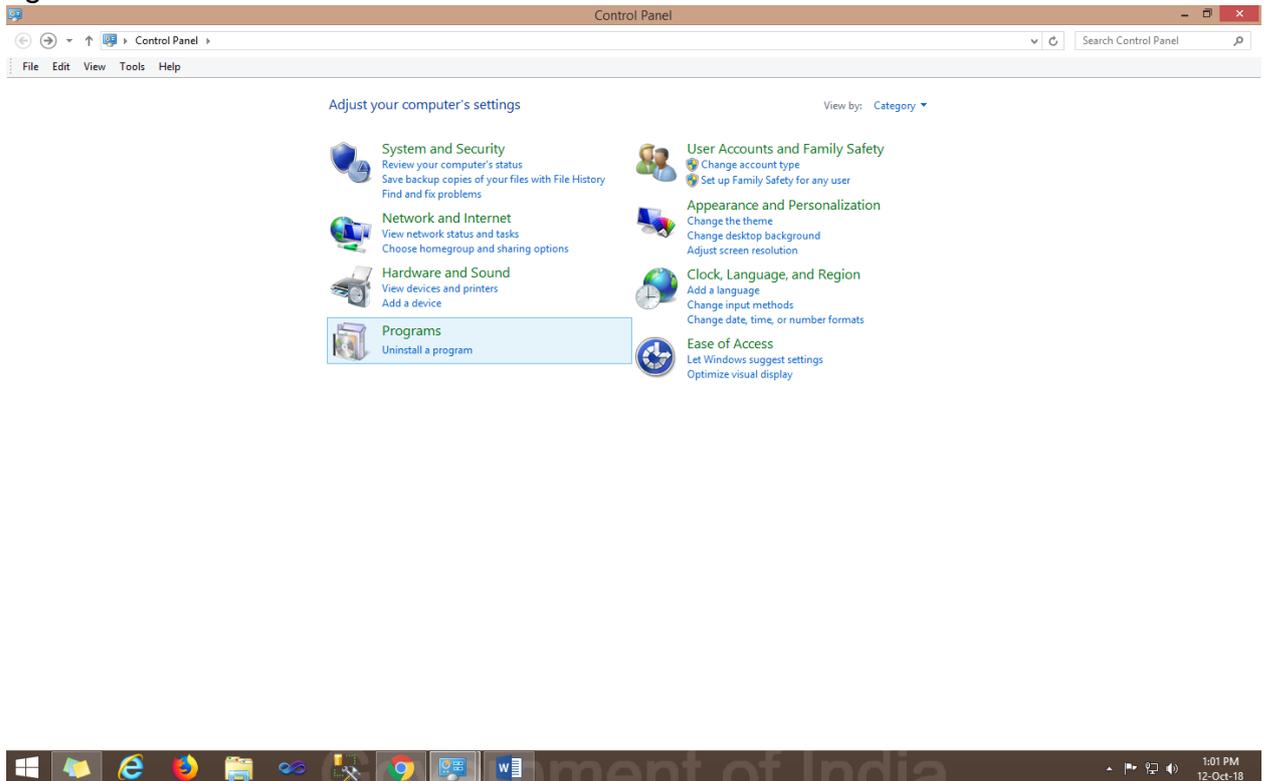


- **Step 8:** After successful installation of 2 Java versions, confirmation screens will appear. Thereafter close the screen.
- **Step 9:** After installation, you will see the newly installed icons of Java in the control panel, as shown below.

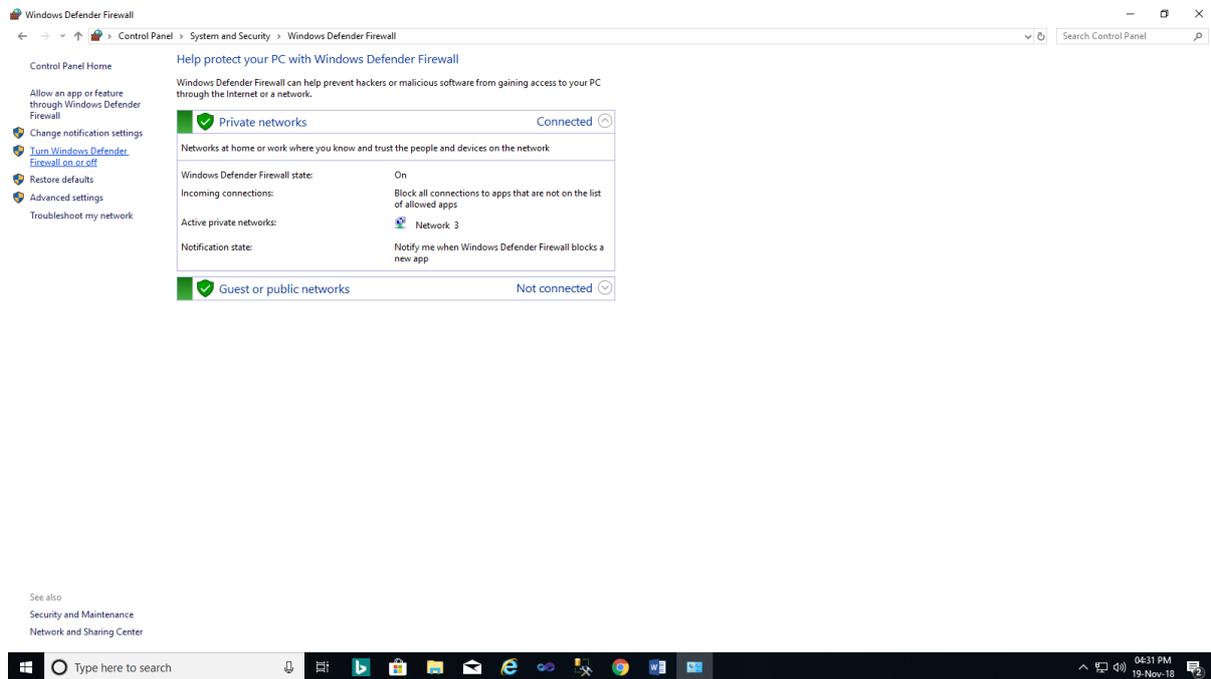


- **Step 10:** Now open control panel.

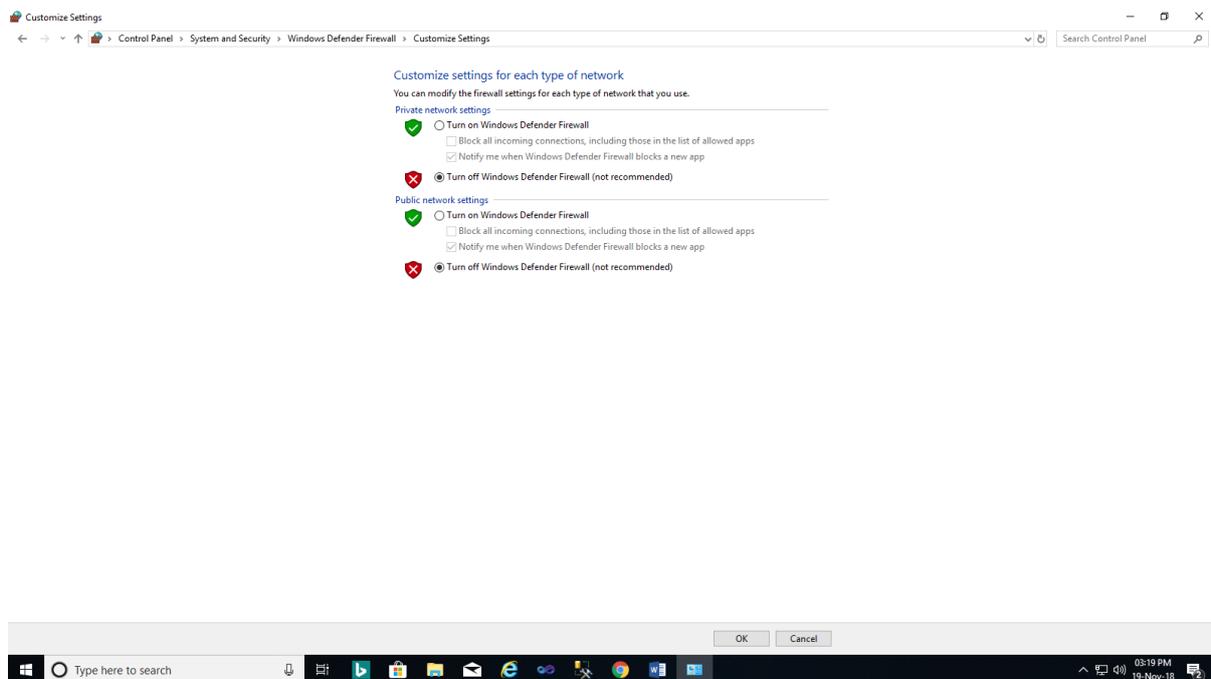
➤ **Step 11:** Then click on **System and Security** link in Control Panel as shown in the below screen. Then click on the **“Windows Defender Firewall”** link on the right hand side.



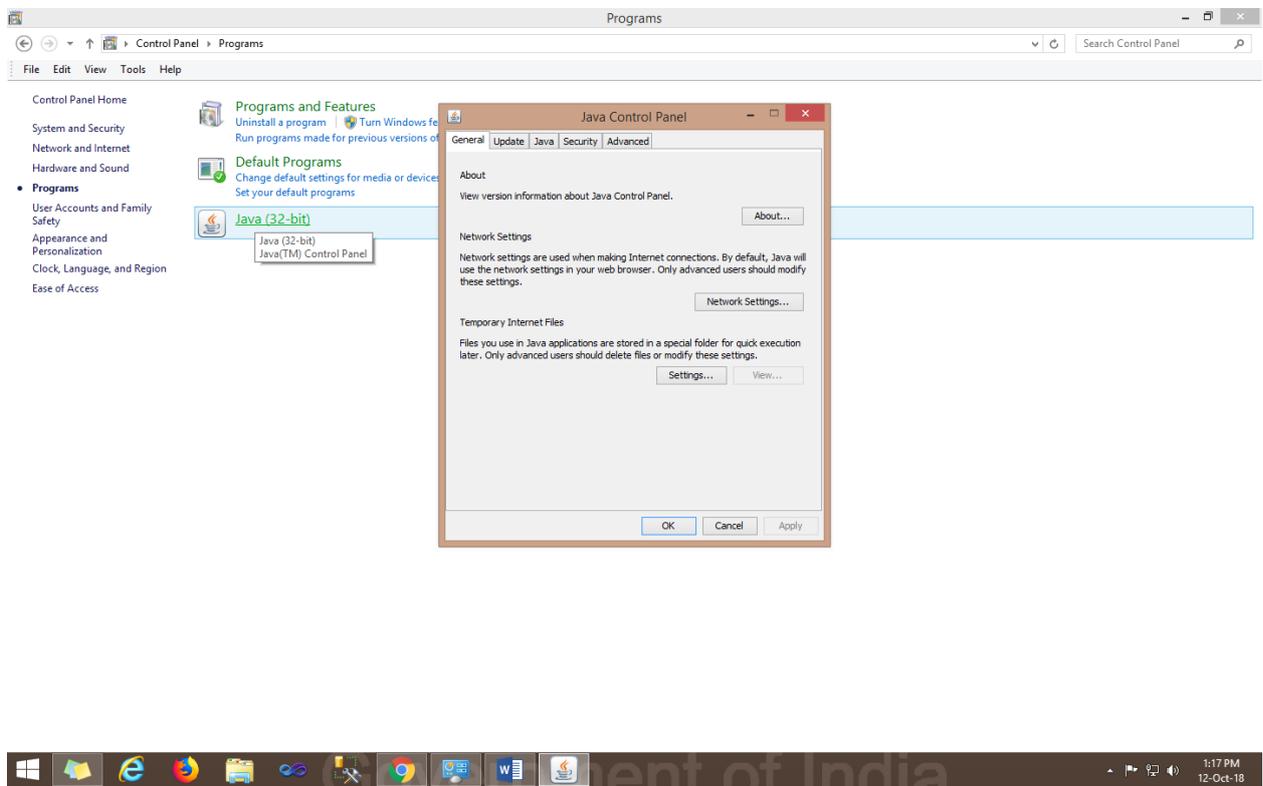
- **Step 12:** Now click on the “Turn Windows Defender Firewall on or off” link shown in the left hand side.



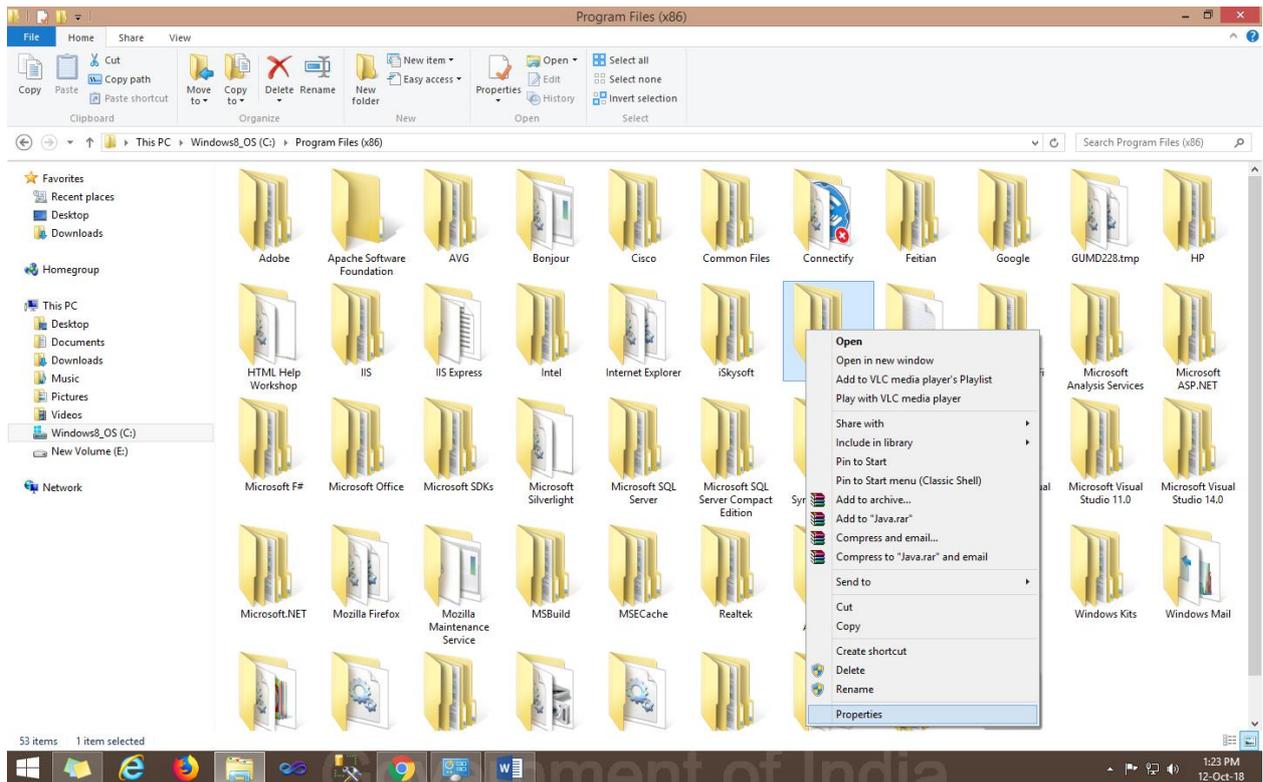
- **Step 13:** Now select the “Turn Off” options (in both rows) shown in the below screen. After this save the settings.



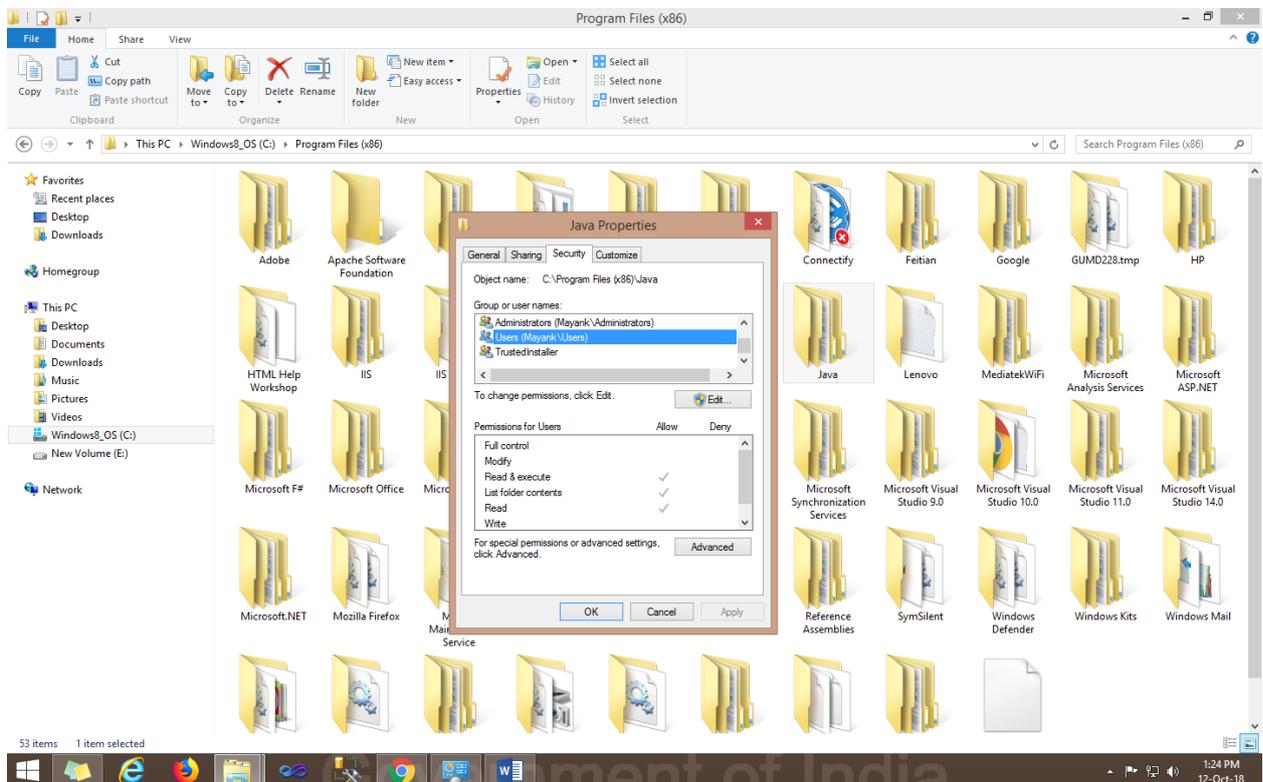
- **Step 14:**Open Control Panel→Programs. Then click on **Java** link. Now following popup window will appear.



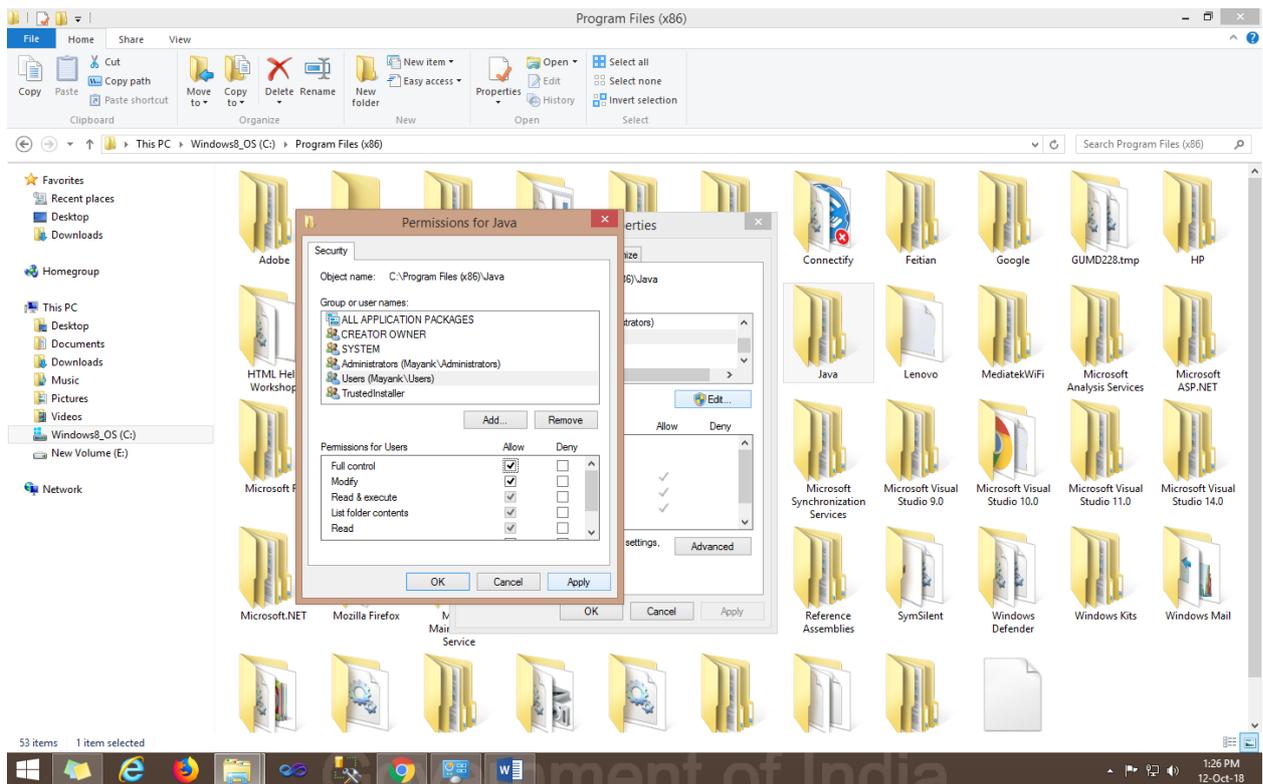
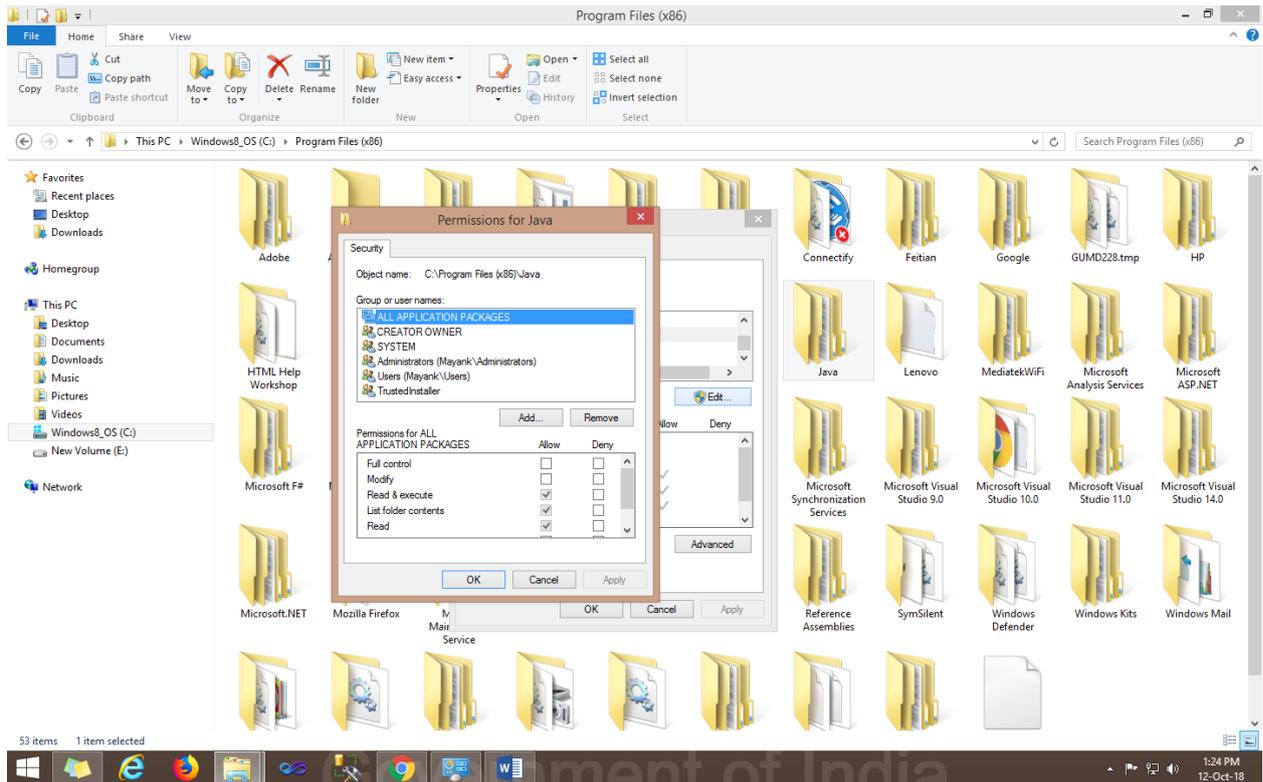
- **Step 15:** Now click on the Security tab.
- **Step 16:**Under Security tab, click on '**Edit Site List**' button and add CPMS url (<https://dotpension.gov.in>) in the Exception Site List.
- **Step 17:** Now go to C:\Program Files (x86) -> Right Click on Java folder -> Click Properties



➤ **Step 18:** Now a popup window will appear. Now go to security tab and click on the Edit button.



➤ **Step 19:** The following popup window will appear. Now select the **Users** (in the **Group or User Names** Box on the top of popup window). Select **Allow** checkbox in front of the “Full Control” (in the permission for Users box) and click **Ok** button.



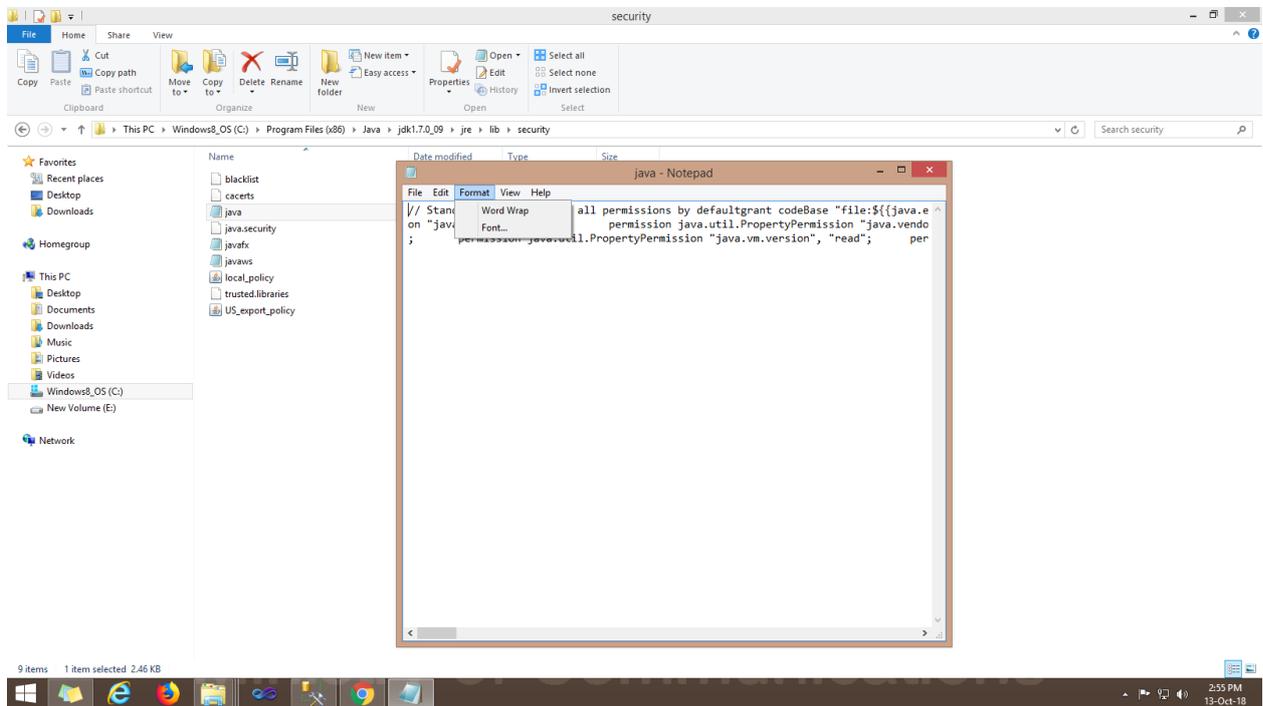
➤ **Step 20:** Now go to C:\Program Files. Repeat step 17 to step 19 for this folder as well.

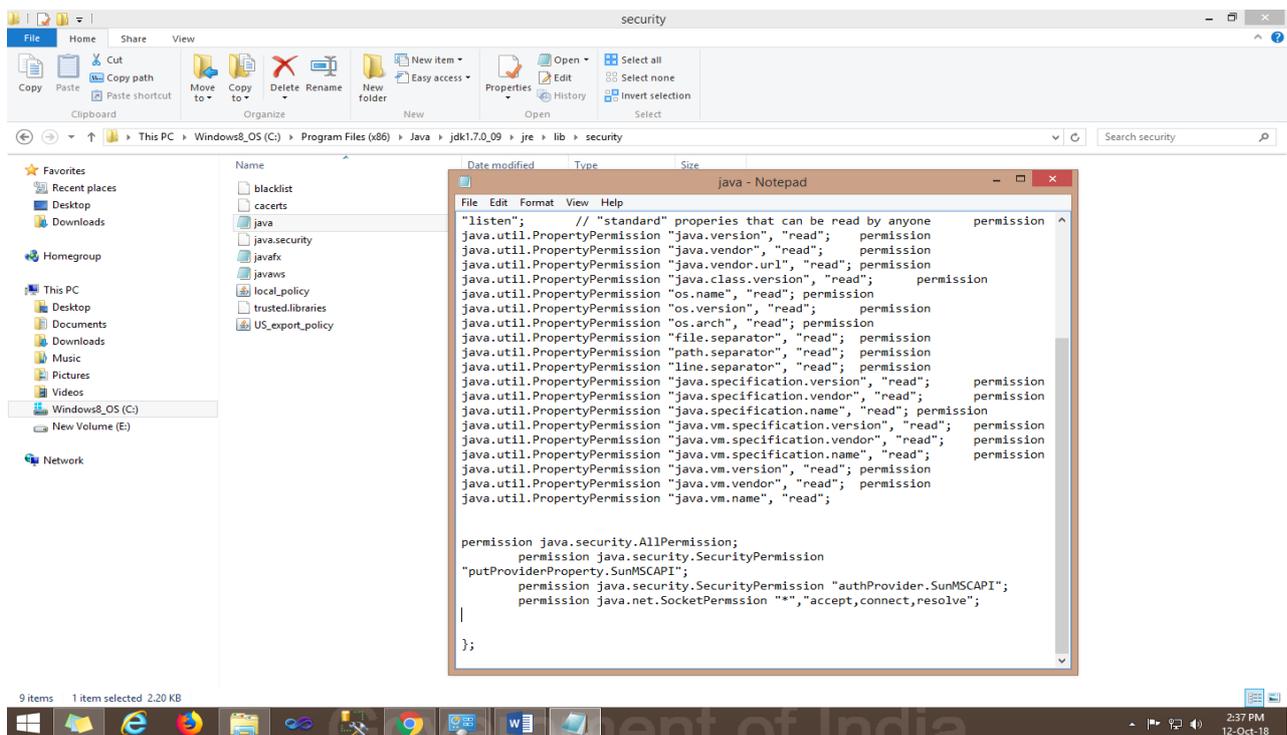
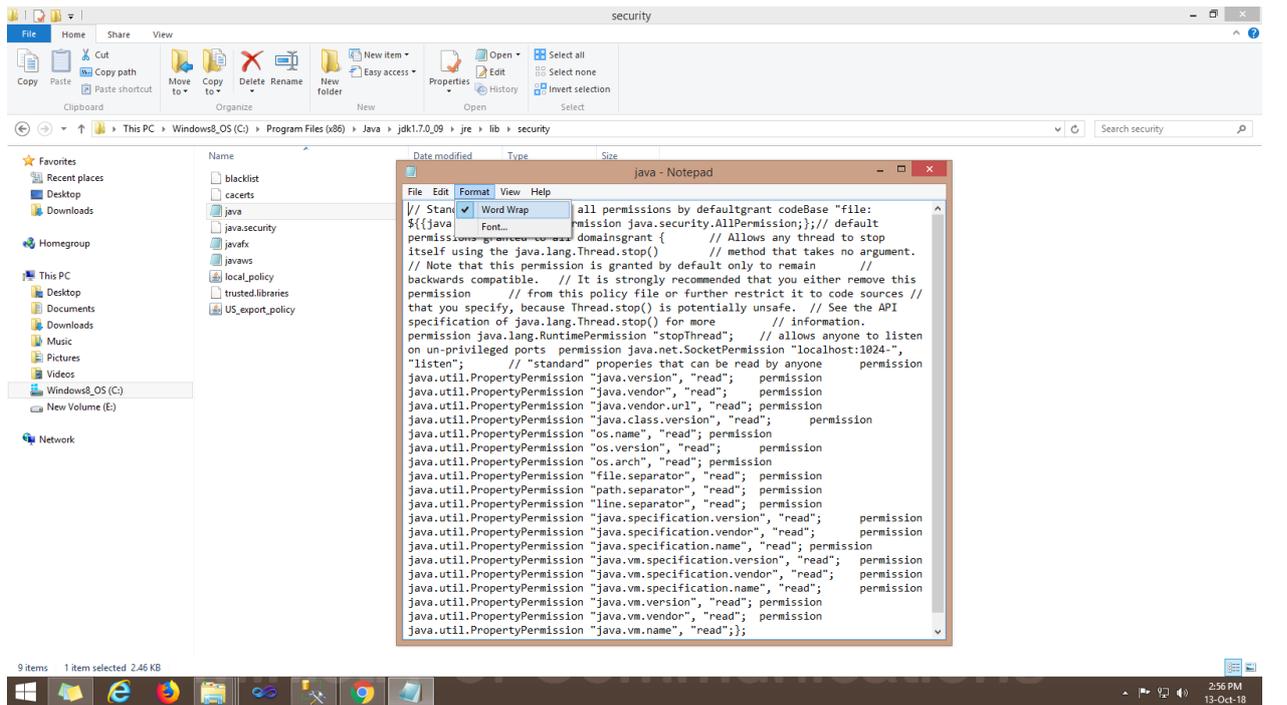
➤ **Step 21:** Now, close all windows. Go to My Computer/ This PC -> Local Disk (C:\Program Files (x86)\java\jre1.8.0_191\lib\security\java (Policy File)

Then open java.policy file in notepad and copy the following text and paste it before sign `};` in the last line of the file and save the file before close it.

```
permission java.security.AllPermission;
permission java.security.SecurityPermission "putProviderProperty.SunMSCAPI";
permission java.security.SecurityPermission "authProvider.SunMSCAPI";
permission java.net.SocketPermssion "*" ,"accept,connect,resolve";
```

NOTE: After opening the file in notepad, please click on the format menu. If the word wrap is OFF, then make it ON by clicking on it. As appear in the following screenshot.





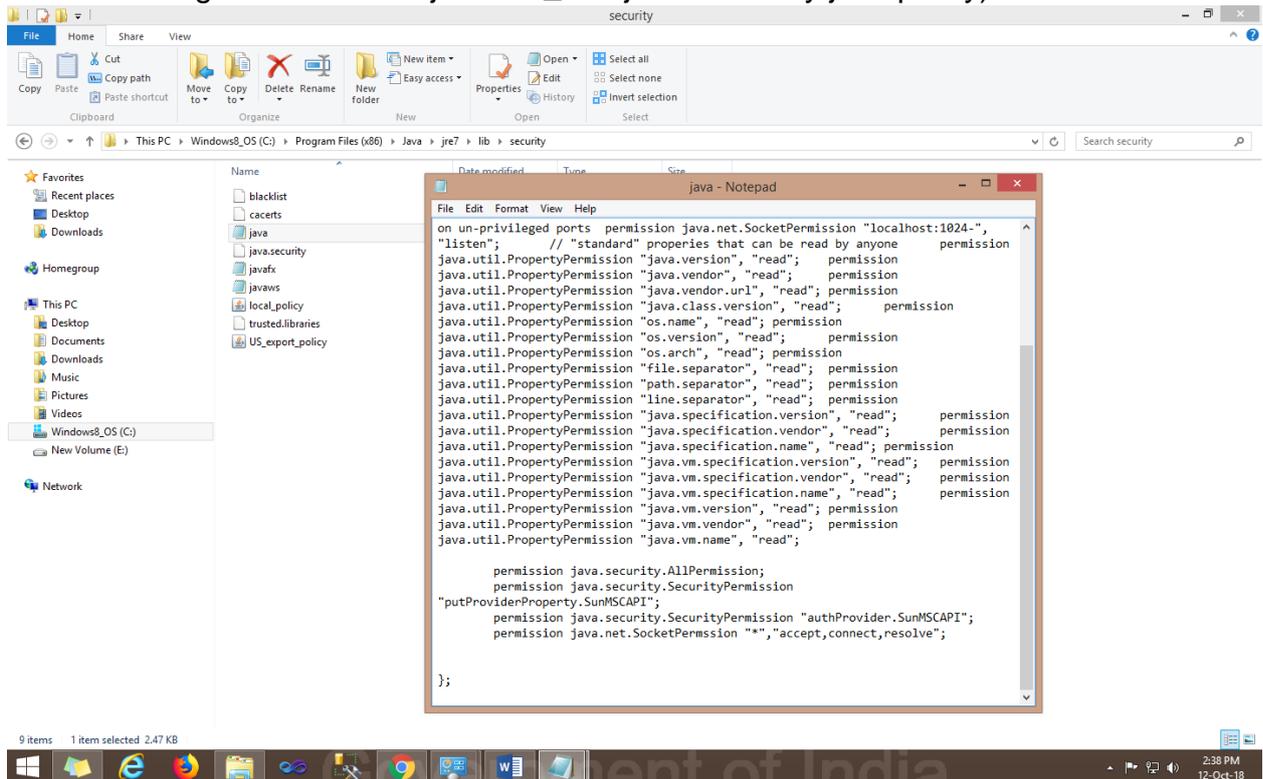
- **Step 22:** Now, close all windows. Go to My Computer/ This PC -> Local Disk C:\Program Files (x86)\java\jdk1.8.0_191\jre\lib\security\java (policy file) in notepad and copy the following text and paste it before sign `};` in the last line of the file and save the file before close it.

permission java.security.AllPermissions;
 permission java.security.SecurityPermission"putProviderProperty.SunMSCAPI";

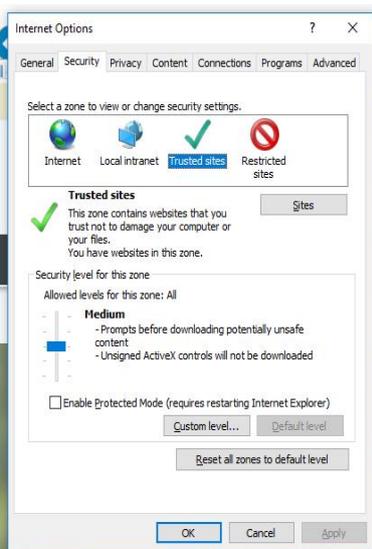
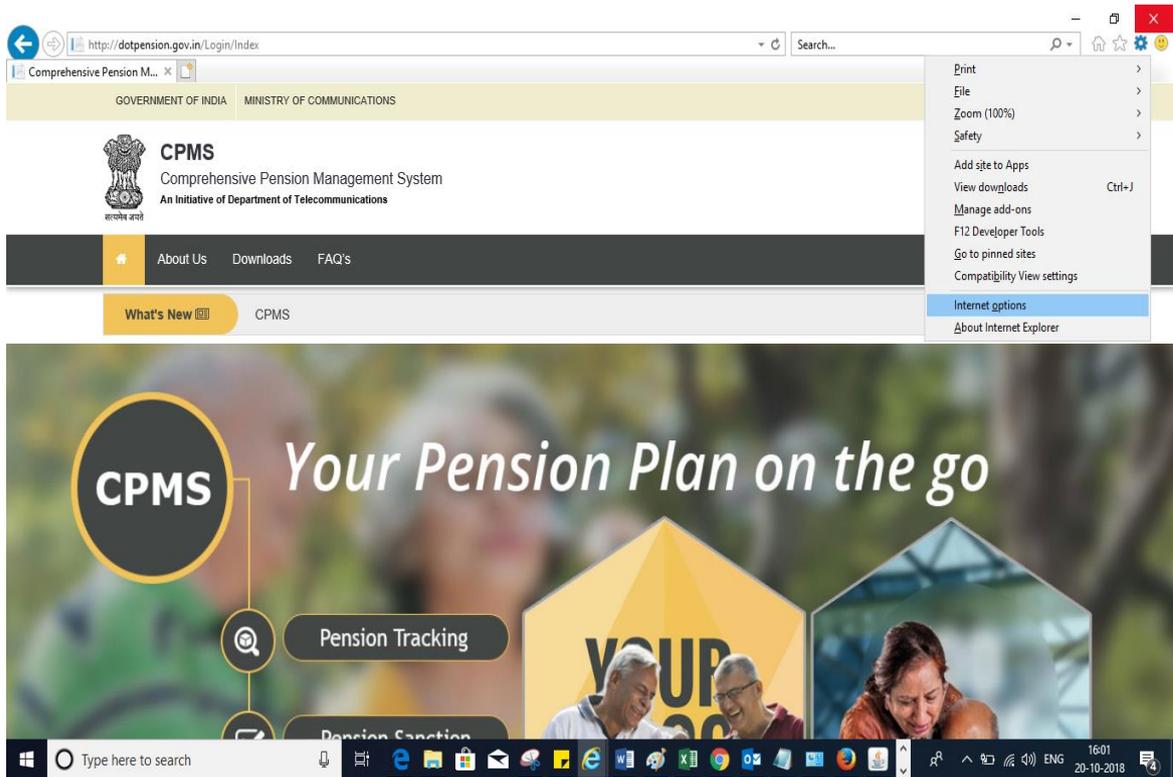
```
permission java.security.SecurityPermission "authProvider.SunMSCAPI";
permission java.net.SocketPermsion "*" ,"accept,connect,resolve";
```

NOTE: After opening the file in notepad, please click on the format menu. If the word wrap is OFF, then make it ON by clicking on it. (As done previously)

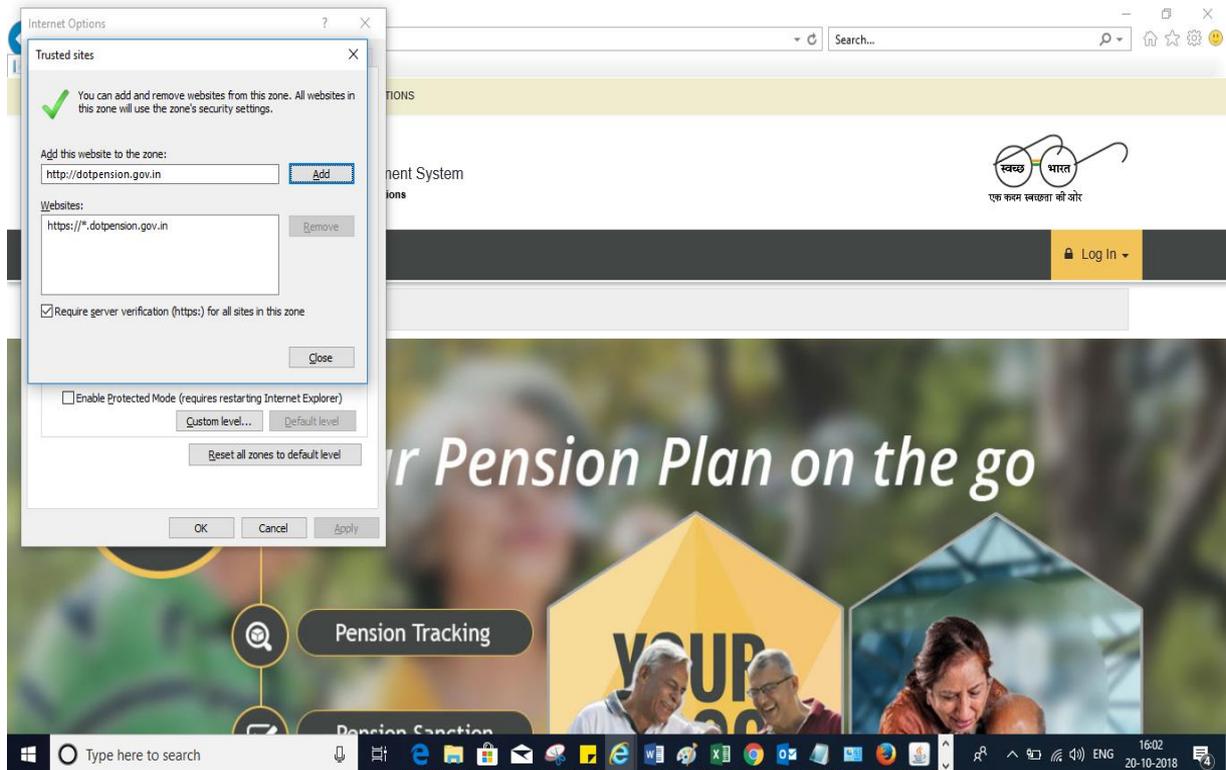
- Go to My Computer/ This PC -> Local Disk C:\Program Files→Java. Repeat **steps 21 and 22** for the two folders **jre1.8.0_191** and **jdk1.8.0_191** (path is as follows → C:\Program Files\Java\jre1.8.0_191\lib\security\java.policy and C:\Program Files\Java\jdk1.8.0_191\jre\lib\security\java.policy).



- **Step 23:** Now after completion of the above steps, Java installation on the System is complete.
- **Step 24:** Open www.dotpensio.gov.in and go to Browser security settings→ internet options→ security tab→ click on green color “**Trusted sites**” icon→ click on “**Sites**” button→ click on “**add**” button and close the windows.

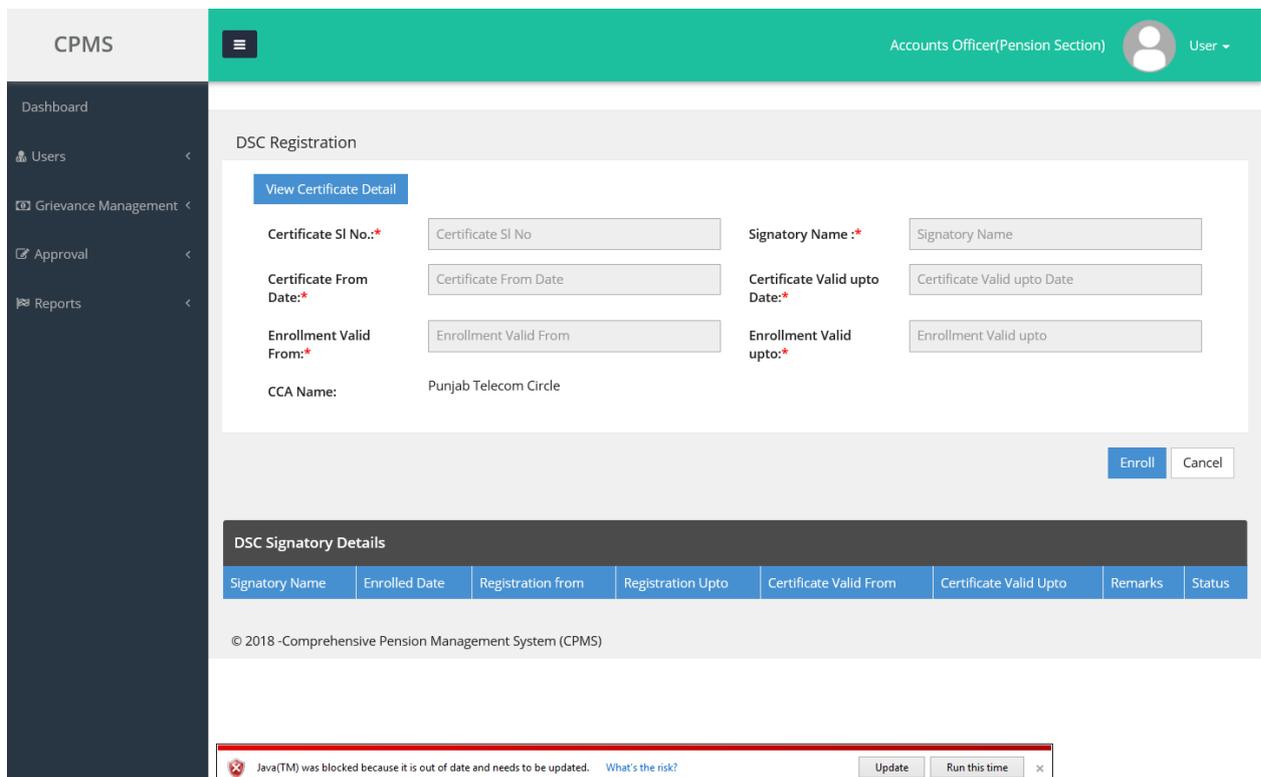


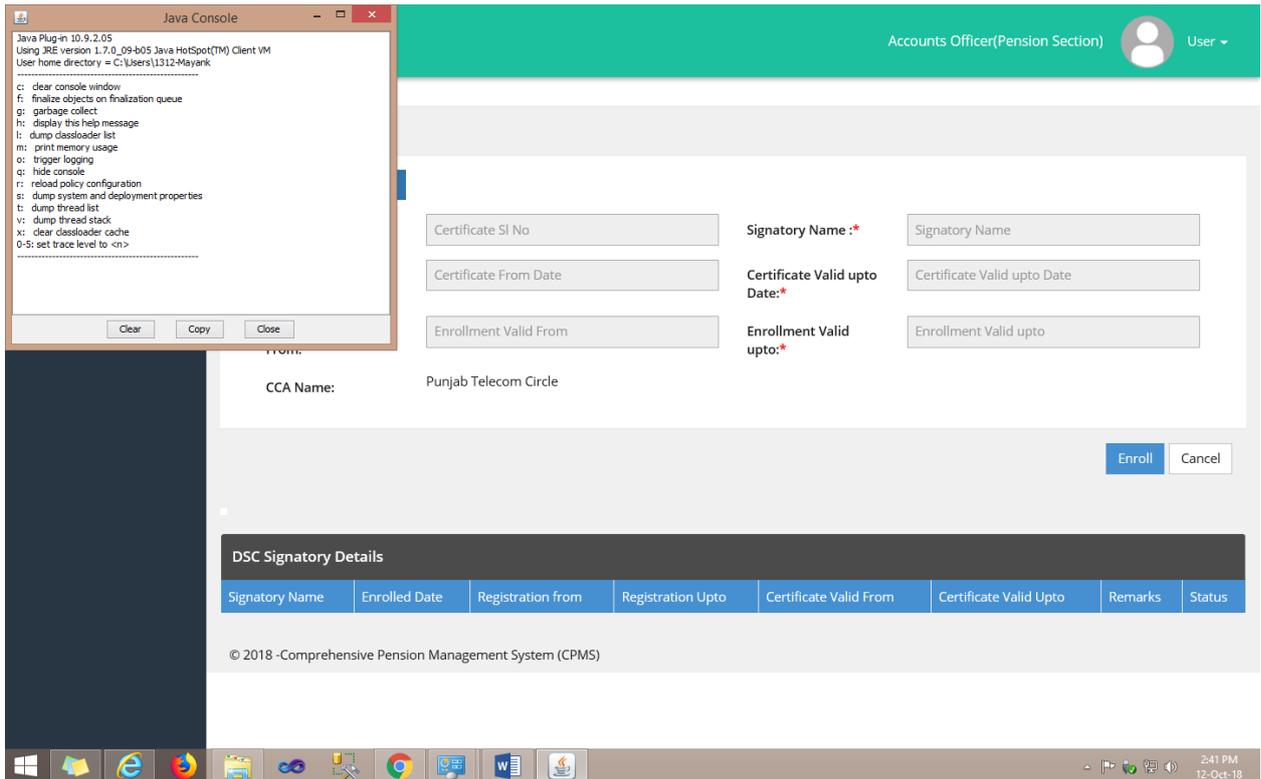
/



- **Step 25:** Now login on CPMS Portal (www.dotpension.gov.in) with AO credentials on Internet Explorer browser, insert DSC in the PC and then click on **User -> DSC Registration** menu.

Click on “Run this time” on the popup button at the bottom of the screen.





- **Step 26:** Now click on the “**View Certificate Detail**” button. It shows the details of the respective DSC. Enter “**Enrollment valid from**” & “**Enrollment valid upto**” **date** (if actual dates are known then same should be entered. If actual dates are not known then dates between Certificate from & upto should be entered). After that click on Enroll Button.

CPMS Accounts Officer(Pension Section) User

Dashboard
Users
Grievance Management
Approval
Reports

DSC Registration

View Certificate Detail

Certificate SI No. :* 1402134332 Signatory Name :* Shankara Nand Mishra

Certificate From Date :* 17/08/2018 Certificate Valid upto Date :* 17/08/2020

Enrollment Valid From :* Enrollment Valid From Enrollment Valid upto :* Enrollment Valid upto

CCA Name: Punjab Telecom Circle

Enroll Cancel

DSC Signatory Details

Signatory Name	Enrolled Date	Registration from	Registration Upto	Certificate Valid From	Certificate Valid Upto	Remarks	Status
							created

© 2018 -Comprehensive Pension Management System (CPMS)

After clicking on the Enroll button the Enrolled DSC details will appear in the DSC Signatory Details box with the status - **created**.

- **Step 27:** After the above steps DSC installation at the user end is completed. Now request has to be sent to “**support.cpms-dot@gov.in**” (or call on CPMS Helpline Nos) for activating DSC. 🙌🙌🙌🙌
- **Step 28:** In case the officer, whose DSC is enrolled, is temporarily or otherwise not available then the new officers DSC has to be register. For this the previous DSC has to be deactivated. Steps for deactivating the old DSC and registering the new DSC are as follows:
 - ❖ Request “**support.cpms-dot@gov.in**” (or call on CPMS Helpline Nos) for deactivating old DSC.

CHAPTER 8

8.1 Annexure 1 (Side Channel User Creation)

- Login from CCA User-id and go to “**Users-> User Registration**” tab.
- Click on the **Add New** button shown there. Then a new window will open shown in Fig 8.0. From the drop down menu, Select the **Head of Office (SSA Unit)** for side channel user.

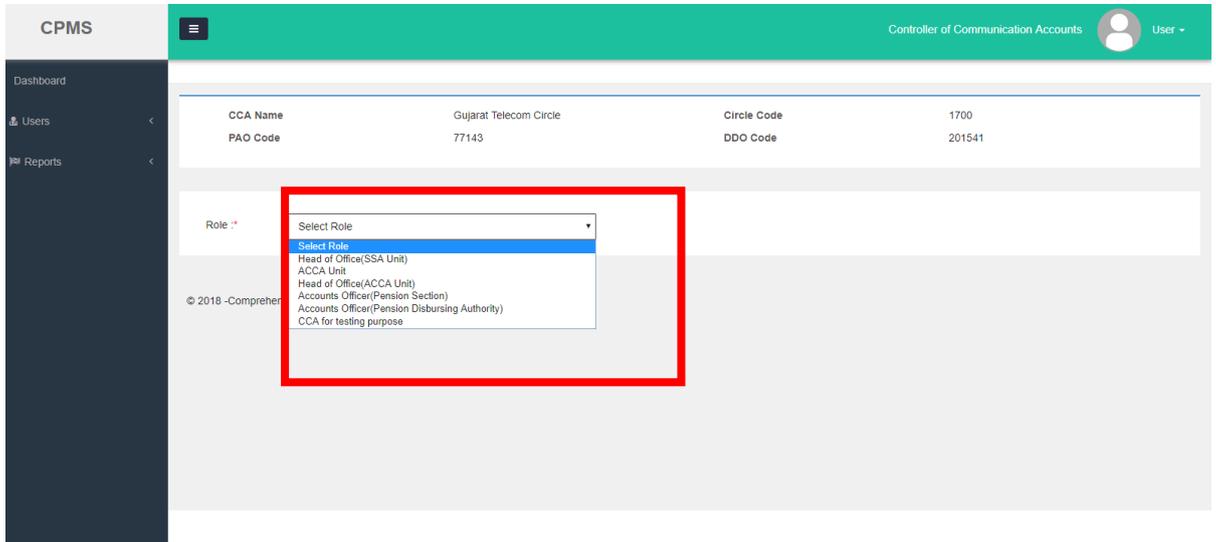


Fig 8.0

CPMS Controller of Communication Accounts User

CCA Name Bihar Telecom Circle Circle Code 1500
PAO Code 77142 DDO Code 201536

Role: Head of Office(SSA Unit)

SSA Unit Name	SSA Unit Code	Email Id	Mobile No
CO , Patna	1501		
Arrah TD	1502		
Bettiah TD	1503		
Bhagalpur TD	1504		
Darbhanga TD	1506		
Gaya TD	1507		
Hajipur TD	1508		
Khagaria TD	1522		
Admin. O/o CCA Bihar	1559		
Bihar Telecom Circle	9004		

Menu List* Users Approval Reports

Save Cancel

• Fig 8.1

- After selection you see the list as shown in above screen. From that list, select the option which ends with **“Telecom Circle”** and having the SSA Unit Code starting with **“9”** which is the unique identifier for the side channel user shown in Fig 8.1.
- Now enter the user-id of HoO as per the format given (hooccaXXXsc@gov.in) in Email Id box (**this is a user name only and no need to fill valid email ID**), Mobile No. and select the **“Menu List”** Options give below and save the record.
- Now, once the user is created, login from that particular user id, fill the mandatory information. Also you can change the default password from there and save the record again.
- Once the HoO id for Side channel is created, then login from the same user-id, go to **“Users -> User Registration”**, click on the **“ADD NEW”** button and create the next hierarchy i.e. DH for the Side channel of SSA unit.
- Once the DH user is created, click on the **“Authorization” lock icon** shown in the grid and assign the necessary menu rights to the user shown in Fig 8.3.

CCA Name	Bihar Telecom Circle	Circle Code	1500
PAO Code	77142	DDO Code	201536

User Registration: Add/Edit

Title :* First Name :*

Middle Name : Last Name :

UserName :* Role :*

CCA Name :* Mobile No. :*

Email ID :*

Address :

Fig 8.2a

Menu Rights Userwise

User Name

Menu List

- Pensioner Details
- Action
- Reports
- Audit Trial
- Retiree Details

© 2018 -Comprehensive Pension Management System (CPMS)

Fig 8.2b

- After giving the rights, login from the DH user-id and default password and fill the necessary info and save the record. Now user will be able to process case from side channel.

8.2 HoO Unit- Side channel (Steps for Processing a Case)

This chapter deals with flow of pension papers in the CCA office when the case is processed through Side channel on behalf of the HOO unit and the pensioner to enable creation of digital profile of pensioner.

8.2.1 Normal Pension Case

8.2.1.1 Creation of Retiree Profile

- DH has to login to create the retiree profile.
- Select Retiree details on the Menu options available on the left panel.
- Click on “Add New” button at the right top corner of Retiree Profile page to get the form to fill.
- Enter the following information on retiree detail form (underlined parameters are the mandatory fields):
 - q. Title
 - r. First Name
 - s. Middle Name
 - t. Last Name
 - u. Type of Retirement
 - v. Height
 - w. Father’s/ Husband’s Name.
 - x. Mother’s Name
 - y. Date of Birth
 - z. Gender
 - aa. Aadhaar Number
 - bb. PAN Number
 - cc. Mobile Number (This should be an Active Number)
 - dd. Email ID
 - ee. Identification Mark 1
 - ff. Identification Mark 2
- Following details to be filled in other details section (All are mandatory fields):
 - h. Designation
 - i. Group
 - j. Date of Joining
 - k. Date of Retirement
 - l. Date of Superannuation
 - m. Govt. Accommodation provided by Directorate of Estates/BSNL at any time of service: YES/ NO (to select from the dropdown)
 - n. Pay Commission (this should be the Pay Commission corresponding to the last pay drawn)

*After filling the aforementioned information, DH to click on Save button. By using the Clear button, User can also refresh the form and fill in fresh information. (Fig 8.3)

IMPORTANT:-Once this form is filled and next stage initiated it cannot be edited. Therefore, due diligence should be exercised while creating the Retiree Profile.

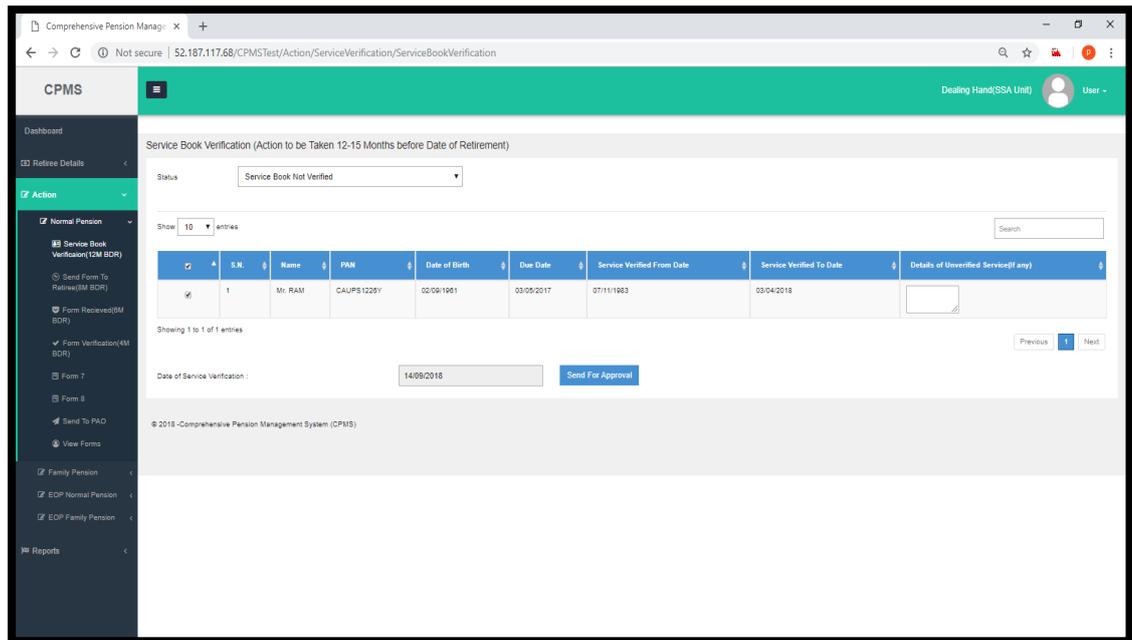
In case Wrong or incorrect profile is detected, please immediately inform the Helpdesk.

Fig 8.3

Creation of the Retiree Profile is the most important step in the process, so it should be ensured entries made therein are correct in all respects. After saving the information, it is recommended a printout of the page be taken from the screen and Vetted by HoO level User before proceeding ahead in Service Verification. If any error is detected, then retiree profile be edited before initiating 8.2.1.2. **(further updates in chapter 11)**

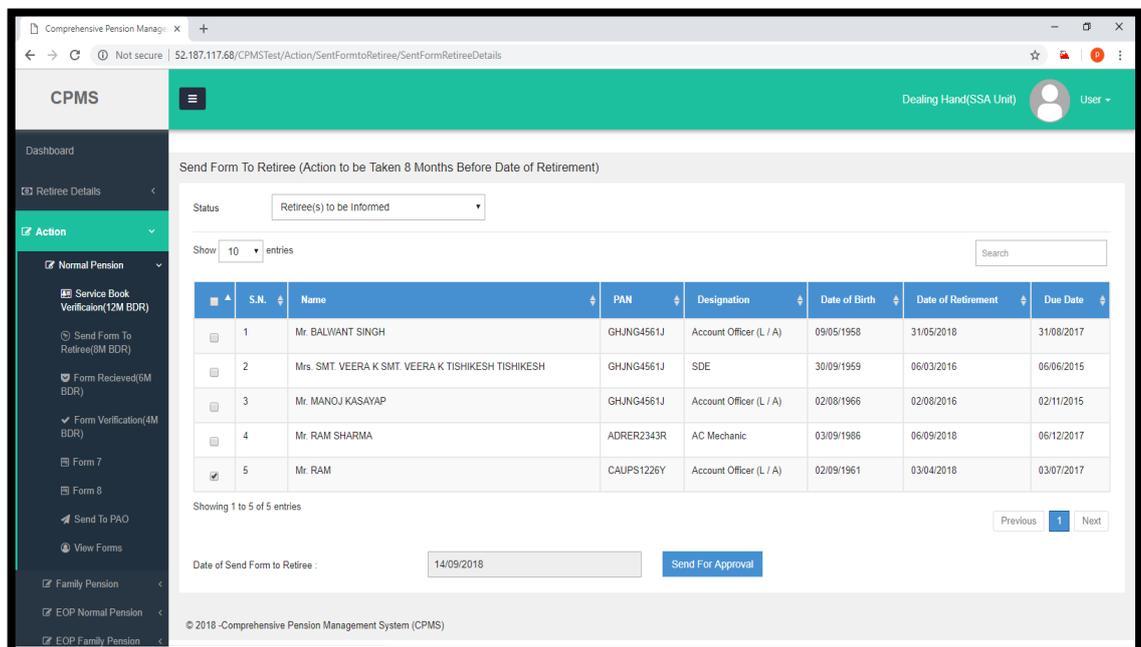
8.2.1.2 Service Book Verification

- It may be noted while the case is processed via side channel, the timelines related to lose their relevance.
- Based on the S/B received in office, same may be filled in the module by DH. If some portion remains unverified it may be filled in remarks column.
- There shall be only one level passing.



8.2.1.3 Send Form to Retiree

- At this stage after DH sends form to retiree, the digital profile of pensioner will be created.
- There shall be only **one level passing**.



8.2.1.4 Form Received

- Prior to Form received stage, DH shall be required to fill up the forms as per documents submitted by the pensioner. Before submission the final submit button, it may be checked and **vetted** that the details are correctly filled.
- If any error is detected however at the form received stage, then the case may be returned for refilling.
- It may be noted that **retiree will not be required to fill the forms**. This activity shall be completed by DH.
- For filling the form go to **“Form Received”**, where you find the record under status **“Cases pending at the Pensioner level”** which is default selected. Now click on the Edit button (Pencil Icon) shown in the last Action column and fill all the detail of Pensioner very carefully. Fig 8.4

CPMS

Dealing Hand(SSA Unit) User

Dashboard

Retiree Details

Action

Reports

Audit Trail

Form Received (Action to be Taken 6 to 8 Months Before Date of Retirement)

Status: Cases pending at pensioner level

Show: 10

Search

S.N.	Name	PAN	Designation	Date of Birth	Date of Retirement	Due Date	Action
1	Mr. RAJA RAM	XXXXXX134G	AAO	10/10/1958	31/10/2018	30/04/2018	

Showing 1 to 1 of 1 entries

Previous 1 Next

© 2018 -Comprehensive Pension Management System (CPMS)

Fig 8.4

- After filling up the profile, on the same **“Form Received”** page select the option **“Cases submitted without Physical Copy”** from **Status** dropdown list shown in Fig 8.5, select the record click on send for approval button. The case will directly land to **“Form 7”** for processing by skipping the step for **“Form Verification”**.
- There shall be only **one level passing**.

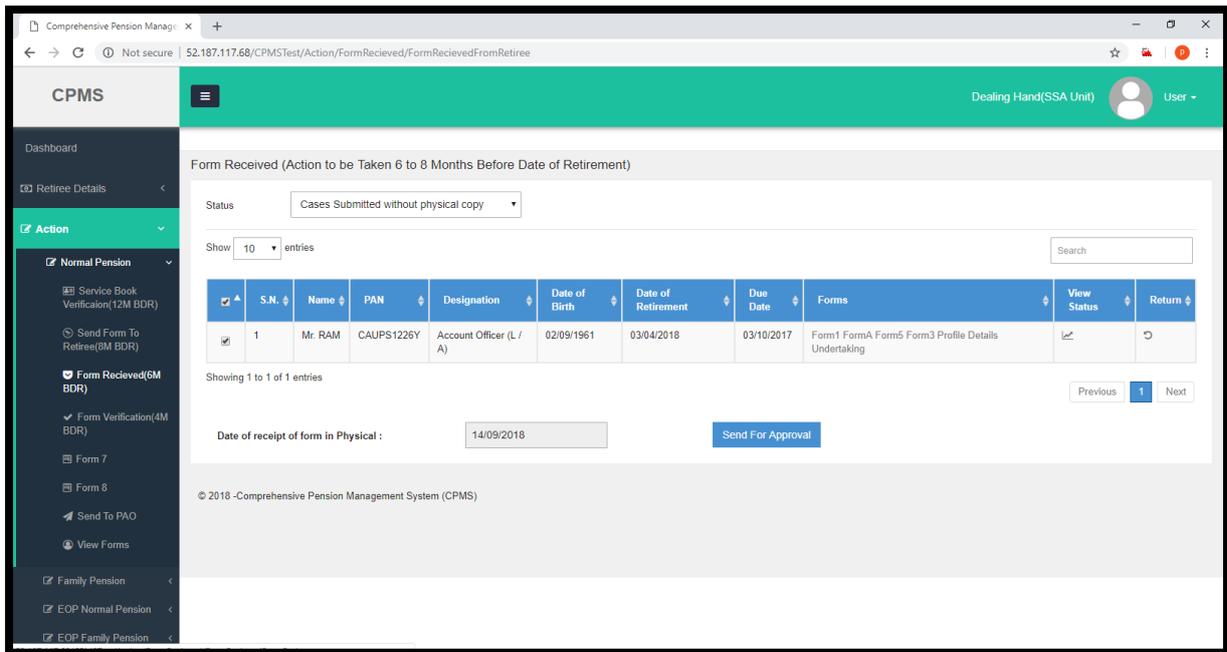


Fig 8.5

8.2.1.5 Form Verification

THIS STEP SHALL NOT BE AVAILABLE IN SIDECHANNEL i.e. SKIPPED

8.2.1.6 Form 7

- DH to verify and fill the required information in Form 7.
- Some information in Form 7 is auto populated. Others have to be entered. (Fig 8.6)
 - ee) Name of the retiring Government Employee
 - ff) Father's/Husband's Name
 - gg) PAN NO.
 - hh) Height & Marks of identification
 - ii) Date of Birth
 - jj) Service to which he/she belongs (indicate name of Organised service, if any, otherwise say General Central Service)
 - kk) Particulars of post held at the time of retirement
 - ll) Name of the office
 - mm) Post held
 - nn) Scale of Pay/Pay Band & Grade pay of the post
 - oo) Basic Pay/Pay in the pay band & Grade pay.
 - pp) Basic Pay/Pay in the pay band & Grade pay
 - qq) Whether the appointment mentioned above was under Government or outside the Government on foreign service terms?
 - rr) If on foreign service, scale of pay/pay band, pay in the pay band and grade pay of the post in the parent department.

- ss) Whether declared substantive in any Post under the Central Govt.?
- tt) Date of beginning of service
- uu) Date of ending service
- vv) Cause of ending service
- ww) In case of compulsory retirement, the orders of the competent authority whether pension may be allowed at full rates or at reduced rates and in case of reduced rates, the percentage at which it is to be allowed (Please See Rule 41)
- xx) In case of removal/dismissal from service whether orders of the competent authority have been obtained for grant of compassionate allowance and if so, at what rate (Please see Rule 41)
- yy) Particulars relating to military service, if any.
- zz) Particulars relating to the service in autonomous body, if any.
- aaa) Whether any Departmental or judicial proceedings in terms of rule 9 of the CCS(Pension) Rules, 1972 are pending against the retiring employee. (If yes, in terms of Rule 69, provisional pension will be admissible and gratuity will be withheld till the conclusion of departmental or judicial proceedings and issue of final orders)
- bbb) Length of service
 - vii. Details of omission, imperfection or deficiencies in the Service Book which have been ignored [under rules 59(1) (b) (ii)]
 - viii. Period not counting as qualifying service.
 - ix. Additions to qualifying Service.
 - x. Whether any leave without pay.
 - xi. Net Qualifying service.
 - xii. Qualifying service expressed in terms of complete six monthly periods (Period of three months and above is to be treated as completed six monthly periods (Rule 49)
- ccc) Emoluments
 - c. Emoluments in terms of Rule 33.
 - d. Emoluments drawn during ten months pending retirement.
- ddd) Others: **Details of Govt. dues recoverable out of gratuity**
- eee) Licence fee for Govt. accommodation see sub-rules (2), (3) and (4) of rule 2)
- fff) Dues referred to in Rule 73
- ggg) Amount indicated by Directorate of Estates to be withheld under Sub rule(S) of Rule 72
- hhh) Post-retirement address of the retiree

Form 7

FORM 7
[SEE RULE 58, 60, 61(1)&(3) AND RULE 65(1)]
FORM FOR ASSESSING PENSION/FAMILY PENSION AND GRATUITY
[TO BE SENT SIX MONTHS BEFORE THE DATE OF RETIREMENT TO THE PAO]

PART - I

1.	Name of the retiring Government Employee	Mr. RAKESH
2.	Father's/Husband's Name	FATHER
3.	PAN NO.	CDIPB8480L
4.	Height & Marks of Identification	Height : 180 cm & Identification : CUTINHAND
5.	Date of Birth	04/09/2018
6.	Service to which he/she belongs(indicate name of Organised service, if any, otherwise say General Central Service)	Central Govt/ BSNL
7.	Particulars of post held at the time of retirement	
	a. Name of the office	Delhi
	b. Post held	ACS & DGM (Legal)
	c. Scale of Pay/Pay Band & Grade pay of the post*	PB-1 (5200-20200)
	d. Basic Pay/Pay in the pay band & Grade pay	18000
	e. Whether the appointment mentioned above was under Government or outside the Government on foreign service terms?	Government
	f. If on foreign service, scale of pay/pay band, pay in the pay band and grade pay of the post in the parent department	N.A.
8.	Whether declared substantive in any Post under the Central Govt.? *	No
9.	Date of beginning of service	05/09/2018
10.	Date of ending service	16/09/2037
11.	Cause of ending service	Superannuation
12.	In case of compulsory retirement, the orders of the competent authority whether pension may be allowed at full rates or at reduced rates and in case of reduced rates, the percentage at which it is to be allowed (Please See Rule 41)	N.A.
13.	In case of removal/dismissal from service whether orders of the competent authority have been obtained for grant of compassionate allowance and if so, at what rate (Please see Rule 41)	N.A.
14.	Particulars relating to military service, if any	N.A.
15.	Particulars relating to the service in autonomous body, if any	No
16.	Whether any Departmental or judicial proceedings in terms of rule 9 of the CCS(Pension) Rules, 1972 are pending against the retiring employee. (If yes, in terms of Rule 69,provisional pension will be admissible and gratuity will be withheld till the conclusion of departmental or judicial proceedings and issue of final orders)	No
17.	Length of service 05/09/2018 to 16/09/2037	19 YEARS 0 MONTHS 12 DAYS
	a. Details of omission, imperfection or deficiencies in the Service Book which have been ignored [under rules 59(1) (b) (ii)]	
	b. Period not counting as qualifying service?	No
	c. Additions to qualifying Service?	No
	Whether any leave without pay ?	No
	d. Net Qualifying service 05/09/2018 to 16/09/2037	19 YEARS 00 MONTHS 12 DAYS
	e. Qualifying service expressed in terms of complete six monthly periods(Period of three months and above is to be treated as completed six monthly period (Rule 49)	38 SIX MONTHLY PERIOD

18. Emoluments

a. Emoluments in terms of Rule33

b. Emoluments drawn during ten months pending retirement :

Sl.No.	Pay Commission	Period From	Period To	Pay in Pay Band - Grade Pay/Level	Basic Rate	NPA Rate	(Basic+NPA) For Avg. Emoluments	+
1	7	01/12/2019	30/09/2020	Level-1 (18000-56900)	18000		180000	Delete

Others :

Details of Govt. dues recoverable out of gratuity

(i) Licence fee for Govt. accommodation see sub-rules (2),(3) and (4) of rule 2

(ii) Dues referred to in Rule 73

(iii) Amount indicated by Directorate of Estates to be withheld under subrule(S) of Rule 72

(iv) Post-retirement address of the retiree

Fig 8.6

- DH shall fill up the form 7 as per form 7 received from the HoO. It may be noted if there is any change from the form 7 received from HOO based on final papers received, Same may be fed.
- There shall be only **one level passing**.

8.2.1.7 Form 8

THIS STEP SHALL NOT BE AVAILABLE IN SIDCHANNEL i.e. SKIPPED

8.2.1.8 Send to PAO

- **After all the aforementioned steps, DH will submit the form to Pension Section by clicking on "Send to PAO". While sending this please ensure that all the documents mentioned in checklist are being sent. The papers may then be dispatched by post. This will be the only step in which two level passing will be there.**
- **For cases in which the final papers have not been received, the case shall not be processed beyond AE in Pension Section Module.**

8.2.1.9 View Forms

- All users' can view the list of all the retirees and their generated forms.
- Printout of Form7 and Form 8 can be taken by clicking on 'Print' and sent to Pension Section of concerned CCA office. (Fig 8.7)

S.N.	Name	PAN	View Forms
1	TAMAL KUMAR SINGH	XXXXXX432E	Form1 / FormA / Form5 / Form3 / Form7 / Form8 / View Profile / Undertaking / FMA
2	RAHUL SINHA	XXXXXX543T	Form1 / FormA / Form5 / Form3 / Form7 / Form8 / View Profile / Undertaking / FMA
3	VINOD CGFDHD	XXXXXX561J	Form1 / FormA / Form5 / Form3 / Form7 / Form8 / View profile / Undertaking / FMA
4	BALWANT SINGH	XXXXXX561J	Form1 / FormA / Form5 / Form3 / Form7 / Form8 / View profile / Undertaking / FMA
5	TRAVEESH HEGDE	XXXXXX561J	Form1 / FormA / Form5 / Form3 / Form7 / Form8 / View profile / Undertaking / FMA
6	RAJ KUMAR	XXXXXX561J	Form1 / FormA / Form5 / Form3 / Form7 / Form8 / View profile / Undertaking / FMA
7	RAGHUVENDRA SINGH	XXXXXX456T	Form1 / FormA / Form5 / Form3 / Form7 / Form8 / View profile / Undertaking / FMA
8	RISHABH SHARMA	XXXXXX470L	Form1 / FormA / Form5 / Form3 / Form7 / Form8 / View profile / Undertaking / FMA
9	SIDDARTH SHARMA	XXXXXX281B	Form1 / FormA / Form5 / Form3 / Form7 / Form8 / View Profile / Undertaking / FMA
10	RAKESH	XXXXXX480L	Form1 / FormA / Form5 / Form3 / Form7 / Form8 / View Profile / Undertaking / FMA

Fig 8.7

8.2.2 Family Pension Case

There shall be no change in the treatment of family pension case while processing through Side Channel. While feeding the forms, all the details – in S/B module, form 12/14 and 18 - shall be filled based on the forms submitted by the retiree.

8.2.2.1 Personal Detail

- DH to login and click on Action, then on Family Pension, then on Personal Details option in left pane(**DH Login**→**Action**→**Family Pension**→**Personal Details**)(Fig 8.8)
- Following information need to be entered on personal detail page:
 - s. Title
 - t. First Name
 - u. Middle Name
 - v. Last Name
 - w. Type of retirement.
 - x. Height
 - y. Father's/ Husband's Name.
 - z. Mothers Name
 - aa. Date of Birth

- bb. Gender
- cc. Aadhaar Number
- dd. PAN Number
- ee. FP Mobile Number
- ff. FP Email ID
- gg. FP Identification Mark 1
- hh. FP Identification Mark 2
- ii. Employee Code
- jj. Office
- Following details to be filled in Other Details section (All are mandatory fields):
 - h. Designation at the time of death
 - i. Group
 - j. Date of Joining
 - k. Date of Death
 - l. Date of Superannuation
 - m. Govt. Accommodation provided by Directorate of Estates/BSNL at any time of service: YES/ NO (to select from the dropdown)
 - n. Pay Commission

***After filling the aforementioned information, DH to click on Save button. Once filled the details cannot be changed so due diligence should be exercised before saving. (Fig 8.8)**

To expedite the disbursement of pensionary benefits, Family Pensioner should immediately be advised to submit the required information along with relevant documents to the HoO. Family Pensioners' may also be advised to provide mobile phone number (mandatory) so that they can get updates on the pension process and pension disbursement.

The screenshot shows the 'Personal Detail Profile' form in the CPMS system. The form is organized into two columns of input fields. The left column includes: Title (dropdown menu), Middle Name, Type Of Retirement (dropdown menu set to 'Death'), Father's/Husband's Name, Date of Birth, Aadhaar No., FP Mobile No., FP Identification Mark 1, and Employee Code. The right column includes: First Name, Last Name, Height (in cm), Mother's Name, Gender (dropdown menu), PAN No., FP Email ID, FP Identification Mark 2, and Office. A 'Back' button is located in the top right corner of the form area. The interface also shows a sidebar with 'Retiree Details', 'Action', and 'Reports' options, and a top navigation bar with 'CPMS' and 'Dealing Hand(SSA Unit) User'.

Retiree Other Details

Designation at time of Death :*	<input type="text" value="Select"/>	Group :*	<input type="text" value="Select Group"/>
Date of Joining :*	<input type="text" value="Date of Joining"/>	Govt. Accommodation provided by Directorate of Estates at any time of service :*	<input type="text" value="No"/>
Date of Death :*	<input type="text" value="Date of Death"/>	PayCommission :*	<input type="text" value="Select"/>

Fig 8.8

- After saving the details, an instance will be created in the Personal Details tab, as shown in the Fig 8.9

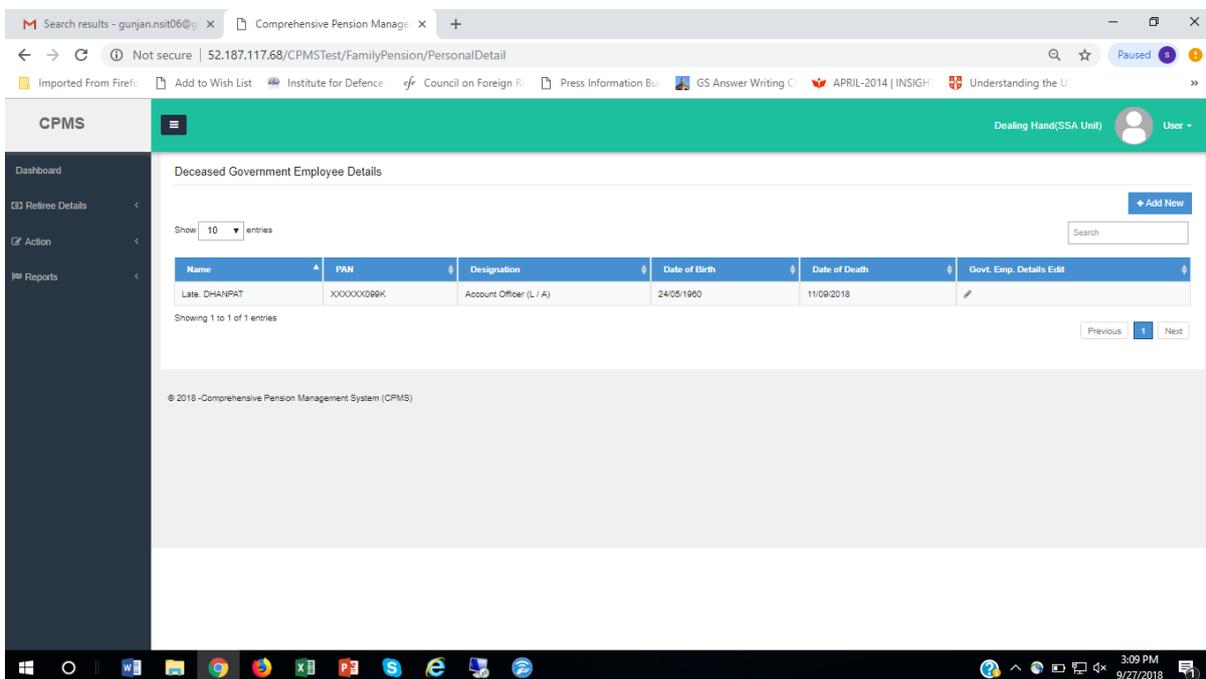


Fig 8.9

- Then DH has to click on **Govt. Emp Details edit** tab, and proceeds to the subsequent screen.
- The next screen will show three tabs viz. Personal details, Family Details and Nomination Form1 (Fig 8.10)

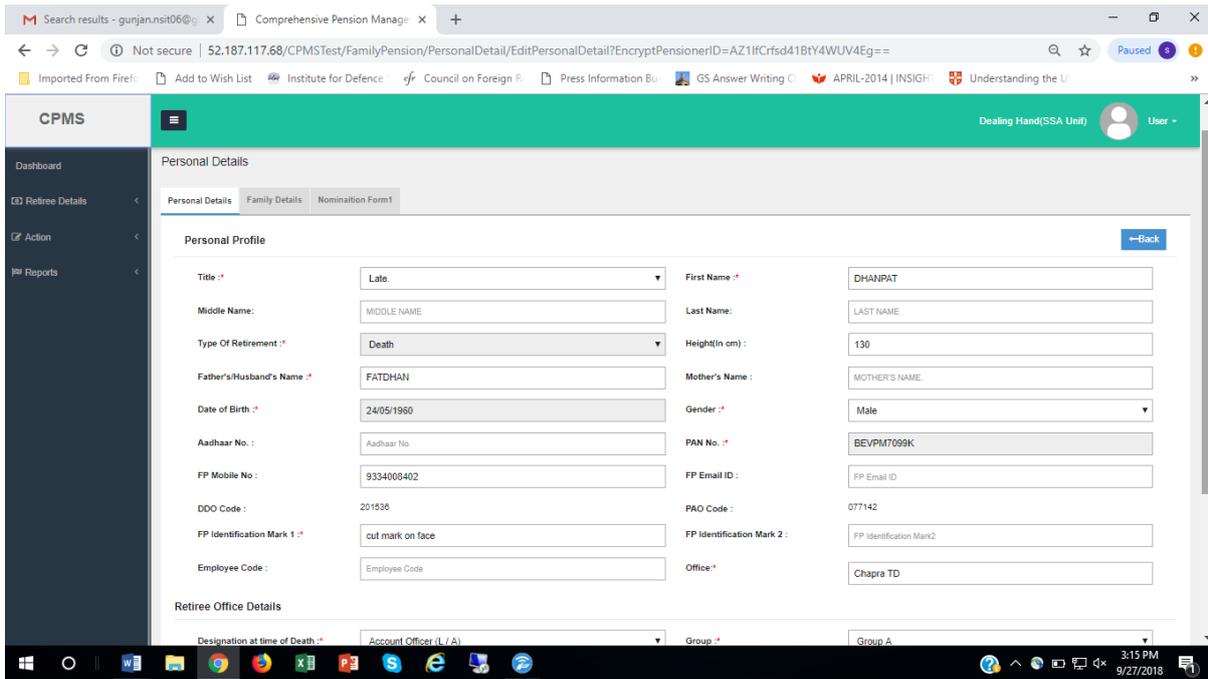


Fig 8.10

- Now the DH has to fill in details of Family and Nominations (Fig 8.11, Fig 8.12, Fig 8.13)

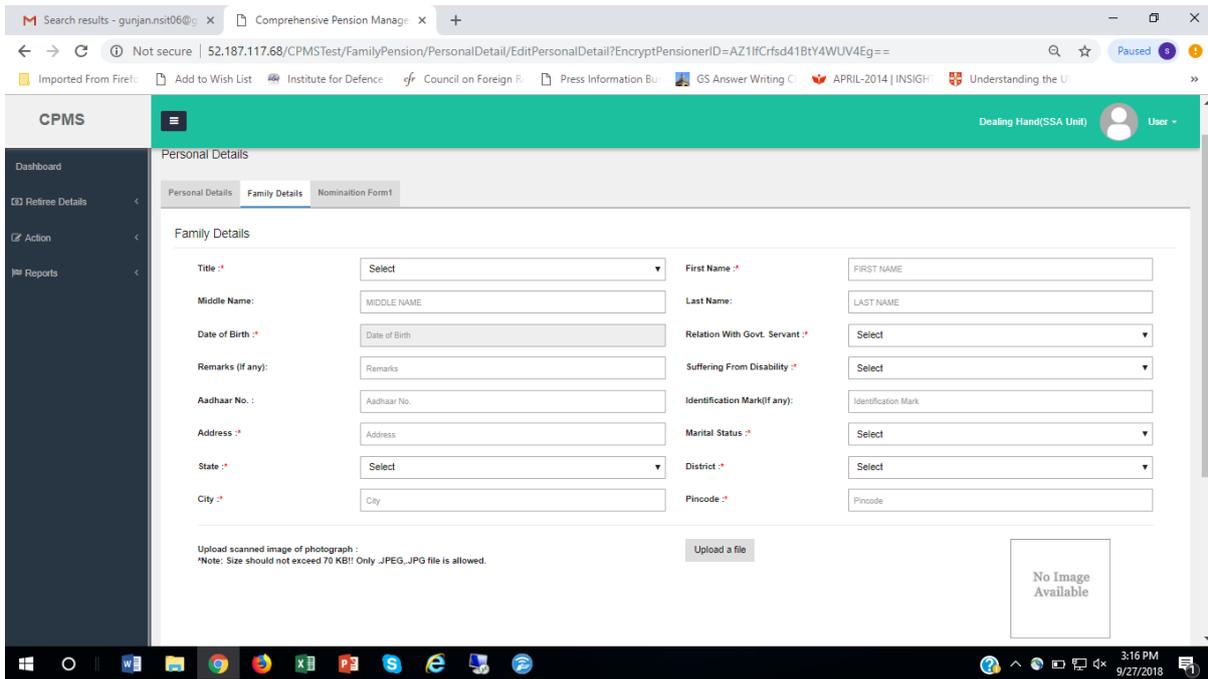


Fig 8.11

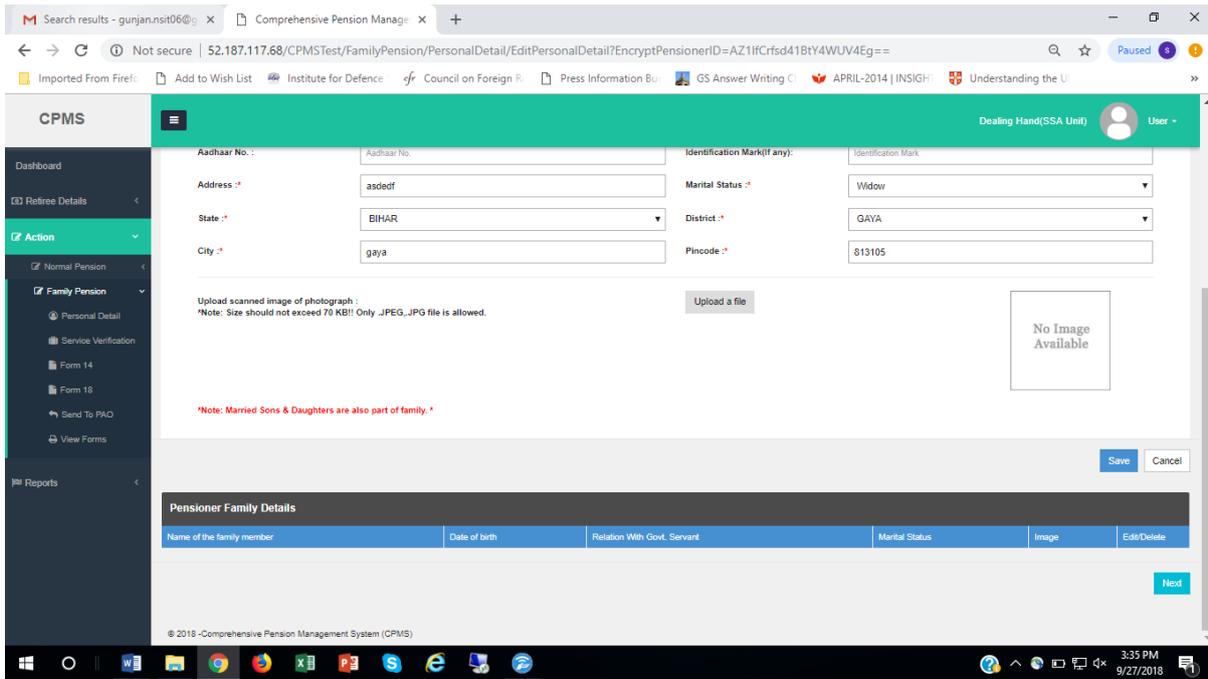


Fig 8.12

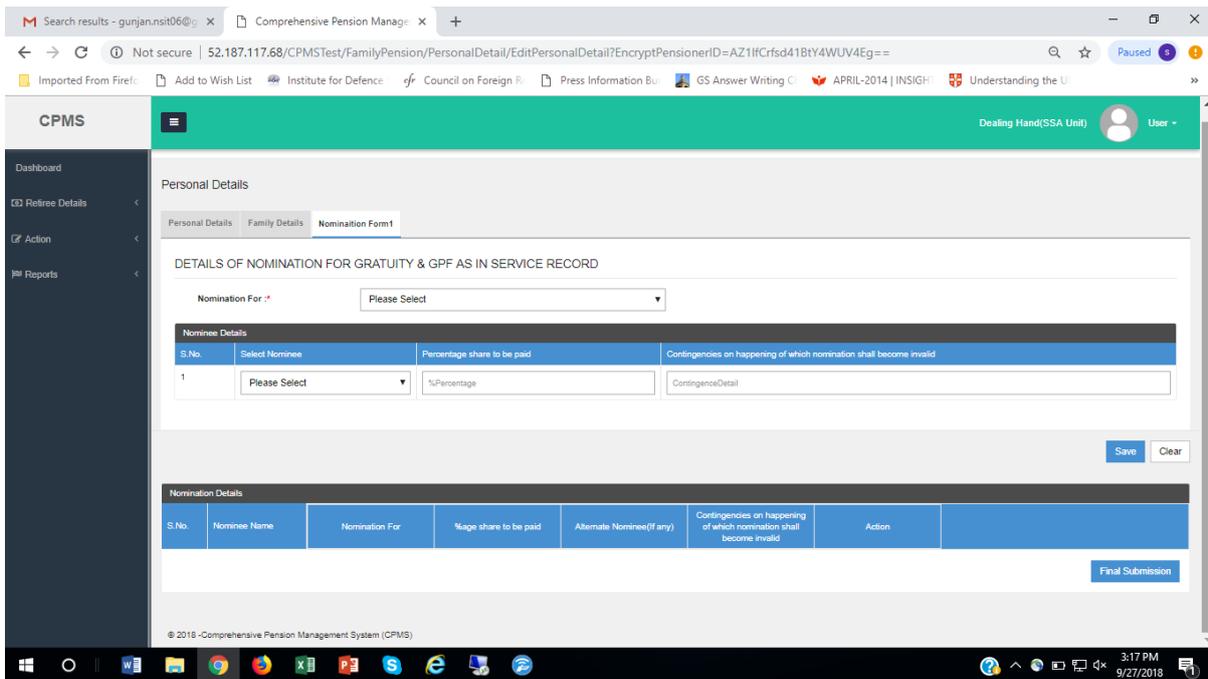


Fig 8.13

- After filling all the details, the DH will submit the form by clicking submit button.

8.2.2.2 Service Verification (Family Pension case)

- DH to select 'Service Verification' tab from the Menu options.
- DH to check the form and send it for approval to HoO for service verification. Before this is done, physical service book verification needs to be done as well. Any

unverified portion of the service book should be noted and attached in the file being sent to Pension Section (CCA Office). (Fig 8.14)

- HoO to login and approve the service book verification. HoO also to verify the service book physically.
- HoO can also return the form to DH in case any discrepancy is found. Then DH will again have to verify and send the form to HoO for approval.

Service Book Verification For Family Pension

Status:

<input checked="" type="checkbox"/>	S.N.	Name	PAN	Date of Birth	Date of Death	Service Verified From Date	Service Verified To Date	Details of Unverified Service(if any)
<input checked="" type="checkbox"/>	1	Late. VIKAS SHARMA	CDIFB1234L	01/01/1959	01/01/2016	01/01/1989	01/01/2016	approved...]

Date of Service Verification :

© 2018 -Comprehensive Pension Management System (CPMS)

Fig 8.14

8.2.2.3 Form 14

- DH to verify and fill the required information in Form 14. **DH may select the claimant who is eligible for pension.** This is to be done as per CCS Pension Rules,1972. 14. The Form shows the claimant details, the bank details, the documents to be uploaded like photograph, signature and death certificate etc. The Bank Undertaking Form also needs to be uploaded duly signed by bank authorities as well the Family Pensioner. FMA option has to be chosen (if applicable and desired by the Family Pensioner) (Fig 8.11 (a), Fig 8.11 (b) and Fig 8.11 (c)).
- It should be seen that the photograph and signature are clear and visible.
- DH clicks on 'Form 12' tab.

Work Sheet (Form 14)

Claimant Details Document Upload

Family Pension ←Back

Name of the Government servant : Ms. CHANDRAKALA A Designation at time of Death : AEP

Date of Death : 17/08/2018

Details of Claimant

Claimant Name : JAGANATHAN H Relationship with the deceased Government servant : Husband

Date of Birth :* 01/08/1990 Date of Re-Marriage :

Address :* Height (in cm.) :

State :* BIHAR District :* GAYA

City :* chapra Pincode :* 800012

Aadhaar No. : PAN No. :

Mobile No :* 9856565954 Email ID :

Identification Mark : Remarks :

Details of bank & post office in which family pension is to be credited:

Bank Post Office

IFSC Code :* Branch Name :*

Bank Name: Bank Account Number(Latest) :*

Type of Bank Account :*

Date on which obtain claim or claims from the claimants in the appropriate form for Death Gratuity and Family Pension as provided in rule 77 :*

Save

© 2018 -Comprehensive Pension Management System (CPMS)

Fig 8.11 (a)

The screenshot shows a web interface for document upload. At the top, there are tabs for 'Claimant Details', 'Document Upload', and 'FMA'. The main heading is 'Document Upload' with a 'Back' button. Below this, there are four rows of upload fields:

- Claimant Photograph(Only jpeg and jpg) :** Includes an 'Upload a file' button and a placeholder image box.
- Signature/Thumb of the Claimant/Guardian(Only jpeg and jpg) :** Includes an 'Upload a file' button and a placeholder box with the text 'No Image Available'.
- Copy of Death Certificate of the deceased employee (pdf file only) :** Includes an 'Upload a file' button.
- Bank Undertaking (pdf file only) :** Includes a 'Print Bank Undertaking' button and an 'Upload a file' button.

A 'Save' button is located at the bottom right of the form.

Fig 8.11 (b)

The screenshot shows a web interface for 'Fixed Medical Allowance'. At the top, there are tabs for 'Claimant Details', 'Document Upload', and 'FMA'. The main heading is 'Fixed Medical Allowance' with a 'Back' button. Below this, there are two radio buttons for 'Whether your residence after retirement is as an *':

- CGHS Covered Area
- Non-CGHS Area

Below the radio buttons is a box titled 'Fixed Medical Allowance Options *' containing five radio button options:

- I will be residing in non-CGHS area but would be availing CGHS facility for In-patient Department (IPD) and Out-patient Department (OPD) treatment. I will not be eligible for FMA
- I will be residing in a non-CGHS area but would be availing CGHS facility for IPD treatment only by payment of CGHS contributions. I will also avail FMA for OPD treatment
- I will be residing in a non-CGHS area and would not be availing CGHS facility for both IPD treatment and OPD treatment. I will avail I FMA
- I will avail medical facilities available to spouse/family members who is an employees/pensioner of Government/PSU/ Autonomous Body. I will not avail CGHS facility and FMA
- Avail medical facility of previous organization. I will not avail CGHS facility and FMA

A note at the bottom states: 'Note: Pension forms will be generated automatically on filling the above information.' A 'Save' button is at the bottom right.

Fig 8.11 (c)

IMPORTANT: -Form 14 prompts the user to enter bank details. The pension of the family pensioner will be credited into this account. Therefore, due diligence should be exercised while filling in all important fields like Bank Account no., IFSC code etc. After required, correct information is filled, Bank Undertaking has to be printed and physically signed by Bank authorities and Family Pensioner, and then uploaded on CPMS.

8.2.2.4 Form 12

- DH to verify and fill the required information in Form 12 for each claimant who has been nominated for gratuity in the nomination form filled earlier. Here DH has to click on the Edit button against the name of the nominee, and his/her details will be populated in the Form 12 (Fig 8.15).
- Again Bank Account details and claimant’s details, picture and signature needs to be uploaded.
- After updation of Form 12 and 14, the case will appear in ‘Form 18’ tab of DH.

Work Sheet (Form 12)

Nominee Details			
Name	Date of birth	Relation With Govt. Servant	Edit
Mrs. REENA	01/01/1969	Wife	

Family Pension

Name : _____ Relationship with the deceased Government servant : _____

Date of Birth : _____

Claimant Signature Upload a file
Note: Size should not exceed 70 KB!! Only .JPG,.JPG file is allowed *

No Image Available

Copy of Death Certificate of the deceased employee (Only pdf file) :-* Upload a file

Details of bank & post office in which family pension is to be credited:

Bank Post Office

IFSC Code :-* Branch Name :-*

Bank Name: Bank Account Number(Latest) :-*

Type of Bank Account :-*

Bank Undertaking (Only pdf file) :-* To upload Bank Undertaking, Please fill bank details first.

Fig 8.15

IMPORTANT: - Form 12 prompts the user to enter bank details. The DCRG of the family pensioner will be credited into this account. Therefore, due diligence should be exercised while filling in all important fields like Bank Account no., IFSC code etc. After required, correct information is filled, Bank Undertaking has to be printed and physically signed by Bank

authorities and Family Pensioner, and then uploaded on CPMS. In case of claimant who is claimant for only Gratuity and not pension, only Mandate form, as generated, needs to be filled by the pensioner and uploaded in portal.

In case where there is no nomination, DCRG has to be divided in equal shares among the family members. Accordingly, the nomination form and Form 12s will be filled.

8.2.2.5 Form 18

- DH to verify and fill the required information in Form 18. Some information is auto populated in Form 18. DH should be careful while filling the important details like qualifying service, non-qualifying service period, last month's pay details etc. Pensionary benefits will be calculated on basis of these figures and hence figures must be cross-verified from service book. (Fig 8.16)
- DH will send Form 18 for approval of HoO.
- HoO will approve/ Return the form. HoO should verify the Pensionary benefit amounts. If the amounts are correct, he/she can approve it. If incorrect, HoO can return the case back to DH for rectification.
- If HoO approves the form it will be processed further. In case of Return, form will be sent back to DH for reverification and thereafter process followed for approval.

Form 18

WORKING SHEET (FORM 18)
[SEE RULES 78(1), 80(1), 80(3), 80 (5), 80-B (1) AND 80-B (5)]
FORM FOR ASSESSING AND AUTHORISING THE PAYMENT OF FAMILY PENSION
AND DEATH GRATUITY WHEN A GOVERNMENT SERVANT DIES WHILE IN SERVICE

1.	Name of the deceased government servant	Late. KUNAL
2.	Father's/Husband's Name	FKUNAL
3.	PAN NO.	ZUFKA75120
4.	Date of Birth	09/09/1980
5.	Date of Death	21/08/2018
6.	Service to which he/she belongs(indicate name of Organised service, if any, otherwise say General Central Service)	Central Govt/ BSNL ▼
7.	Particulars of post held at the time of death	
	a. Name of the office	Bihar
	b. Post held substantively	AAO
	c. Officiating Post	Officiating Post
	d. Scale of Pay/Pay Band & Grade pay of the post*	Select ▼
	e. Basic Pay/Pay in the pay band & Grade pay	
	f. Whether the appointment mentioned above was under Government or outside the Government on foreign service terms?	Government ▼
	g. If on foreign service, scale of pay/pay band, pay in the pay band and grade pay of the post in the parent department	N.A.
8.	Date of beginning of service	09/09/2003
9.	Cause of ending service	Death
10.	Particulars relating to military service, if any	N.A. ▼
11.	Particulars relating to the service in autonomous body, if any	No ▼
12.	Amount and nature of any pension/gratuity received for previous civil service, if any	Enter Amount
	a. Details of omission, imperfection or deficiencies in the Service Book which have been ignored [under rules 59(1) (b) (ii)]	
	b. Period not counting as qualifying service?	No ▼
	c. Additions to qualifying Service?	No ▼
	Whether any leave without pay ?	No ▼
	d. Net Qualifying service 09/09/2003 to 21/08/2018	
	e. Qualifying service expressed in terms of complete six monthly periods(Period of three months and above is to be treated as completed six monthly period (Rule 49)	30 HALF MONTHLY PERIOD
14.	Emoluments	
	a. Emoluments in terms of Rule33	No ▼
	b. Emoluments drawn during one month pending death :	

Sl.No.	Pay Commission	Period From	Period To	Pay in Pay Band - Grade Pay/Level	Basic Rate	NPA Rate	(Basic+NPA) For Avg. Emoluments	+
--------	----------------	-------------	-----------	-----------------------------------	------------	----------	---------------------------------	---

Others :

The date on which action initiated to -

a. The date on which intimation regarding the death of Government servant was received by the Head of Office

b. obtain the 'No demand certificate' from the Directorate of Estates as provided in rule 80-C (1).

c. assess the Government dues other than the dues pertaining to occupation of Government accommodation as provided in rule 80-C (2).

d. assess the service and emoluments qualifying for death gratuity and family pension as provided in rules 78 and 79.

Details of Govt. dues recoverable out of gratuity

(i) Licence fee for Govt. accommodation see sub-rules (2),(3) and (4) of rule 2

(ii) Dues referred to in Rule 73

(iii) Amount indicated by Directorate of Estates to be withheld under subrule(S) of Rule 72

Fig 8.16

- Form 18 and 19 to be put up in physical file for approval of competent authority.

IMPORTANT: -Form 18 calculates the pensionary benefits and pension as applicable to the Family pensioner. Once this form is filled and next stage initiated it cannot be edited in HoO section. Therefore, due diligence should be exercised while filling in all important fields like Pay Band, pay level, Qualifying/Non Qualifying service etc.

In case Wrong or incorrect information is saved in the system, please immediately inform the Helpdesk.

After processing the form 18 from DH level, if HoO user is satisfied then a printout may be taken and approval and signature of competent authority may be taken. If any error is detected in the process, then HOO may return to DH the form 18 for necessary correction. DH shall correct it and send it to HoO user. The approval of competent authority shall be taken.

8.2.2.6 Send to PAO

- **After all the aforementioned steps, DH will submit the form to Pension Section (CCA Office) by clicking on “Send to PAO”.**
- **For cases in which the final papers have not been received, the case shall not be processed beyond AE in Pension Section Module.**

8.2.2.7 View Forms

All users' can view the list of all the retirees and their generated forms. (Fig 8.17)

View Forms

Show entries

S.No. ▲	Deceased Govt. Emp. Name	PAN	Date of Death	View Forms
1	Late SURESH KUMAR SINGH	XXXXXX654R	29/08/2013	Form14 / Form12 / Form18/ Form19/ Undertaking FMA /
2	Late CHANDRAKALA R	XXXXXX174C	30/05/2018	Form14 / Form12 / Form18 / Form19 / Undertaking FMA /
3	Late ABHISHEK SINGH	XXXXXX561J	31/08/2014	Form14 / Form12 / Form18/ Form19/ Undertaking FMA /
4	Late RATANAKAR	XXXXXX561J	15/08/2018	Form14 / Form12 / Form18/ Form19/ Undertaking / FMA
5	Late RAM PRASAD	XXXXXX561J	22/08/2018	Form14 / Form12 / Form18/ Form19/ Undertaking / FMA
6	Late RAGHAV SHARMA	XXXXXX561J	28/08/2018	Form14 / Form12 / Form18 / Form19 / Undertaking / FMA /
7	Late AMIT ROY	XXXXXX561J	30/08/2018	Form14 / Form12 / Form18/ Form19/ Undertaking FMA /
8	Late KUNAL	XXXXXX512O	21/08/2018	Form14 / Form12 / Form18 / Form19 / Undertaking FMA /
9	Late ABC SHARMA	XXXXXX456J	10/09/2018	Form14 / Form12 / Form18 / Form19 / Undertaking FMA /
10	Late DEEPAK KUMAR	XXXXXX793J	01/09/2016	Form14 / Form12 / Form18 / Form19 / Undertaking / FMA

Showing 1 to 10 of 12 entries

Previous **1** 2 Next

Fig 8.17

Chapter 9

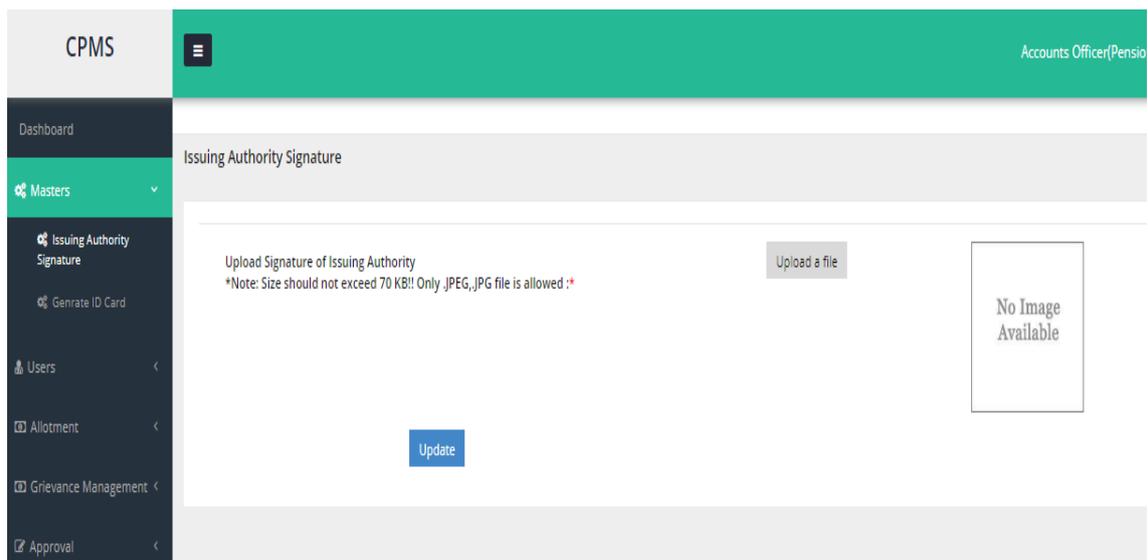
9. ID Card Generation

This chapter deals with the ID Card generation module, where the Retiree ID card can be generated.

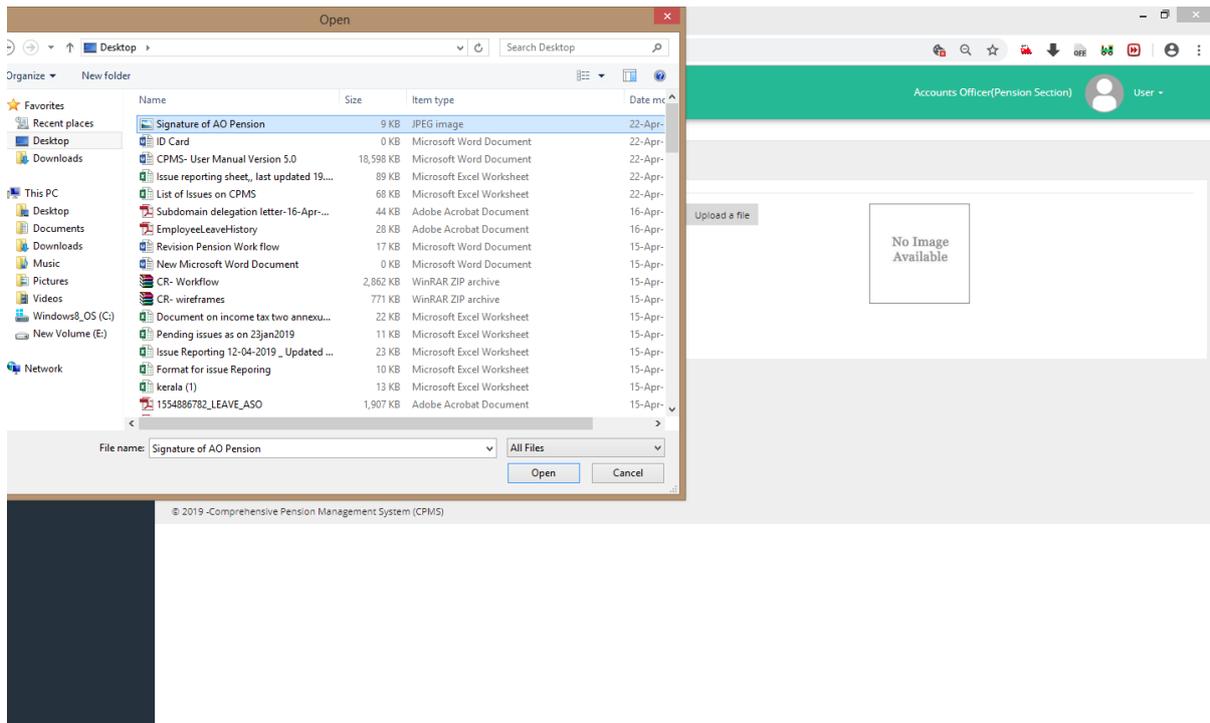
****Note**-ID Card generation will be applicable only for CDA Pensioners

9.1 Upload AO Pension signature

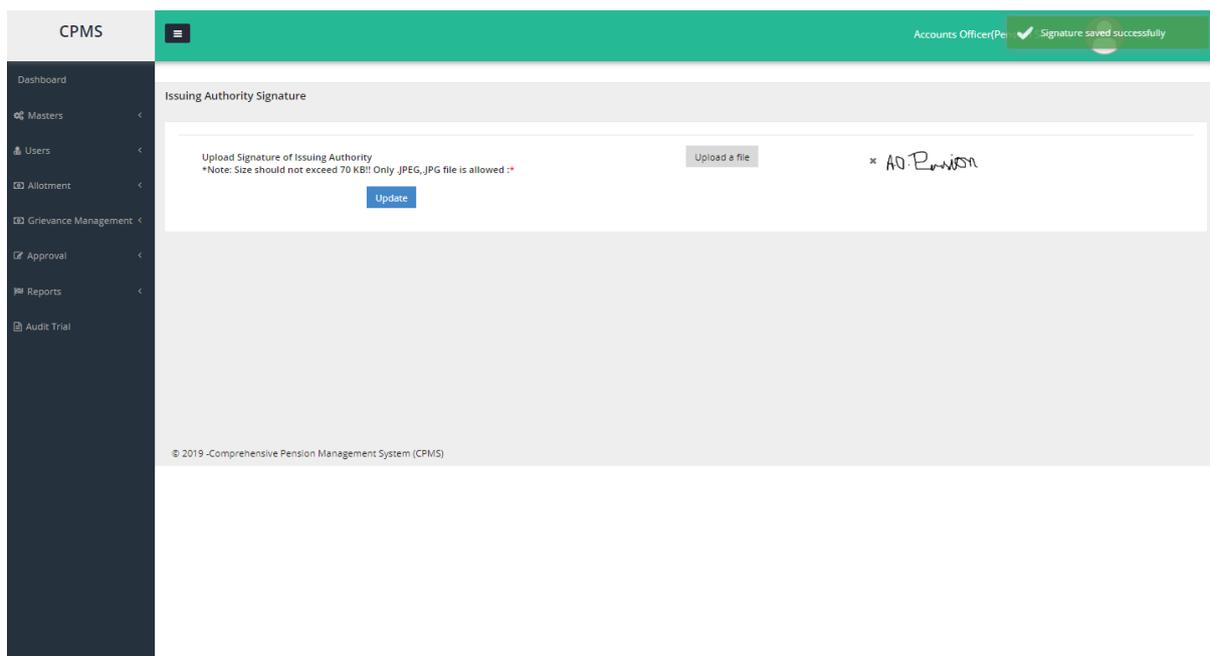
- Login with AO Pension go to the **Masters**→ **Issuing Authority Signature**.
- Click on the “upload a file” button and upload the signature of the Issuing Authority. (Fig 9.1) (Fig 9.2)
- After uploading the image, click on the Update button (Fig 9.3).



(Fig 9.1)



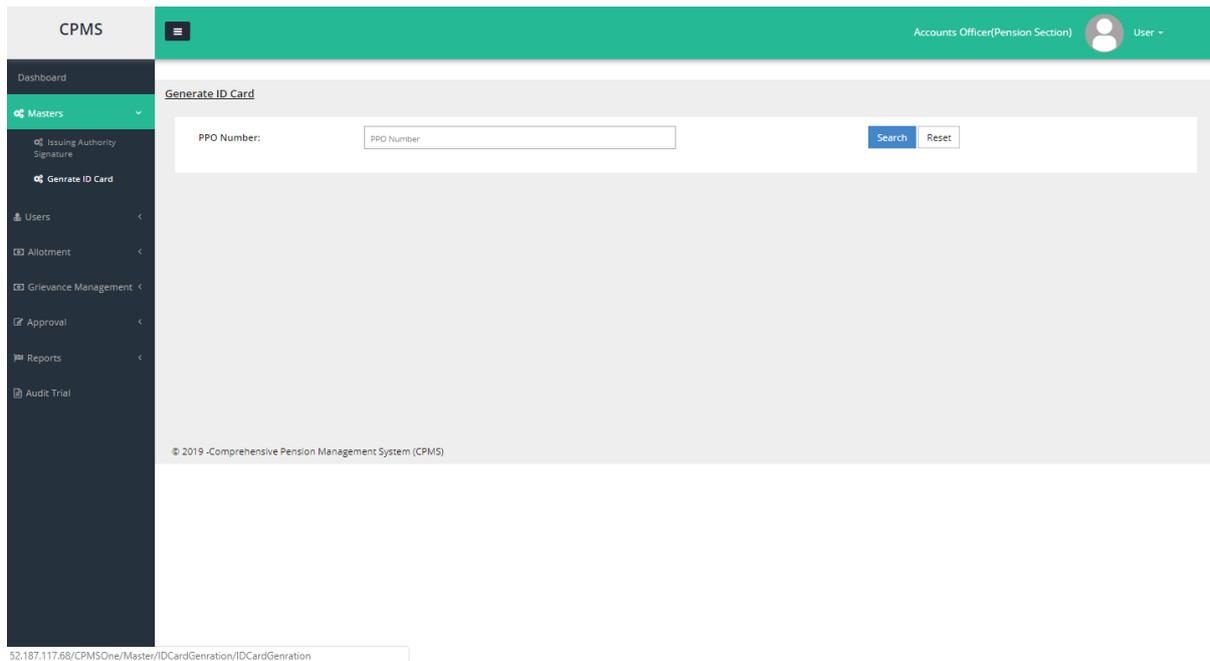
(Fig 9.2)



(Fig 9.3)

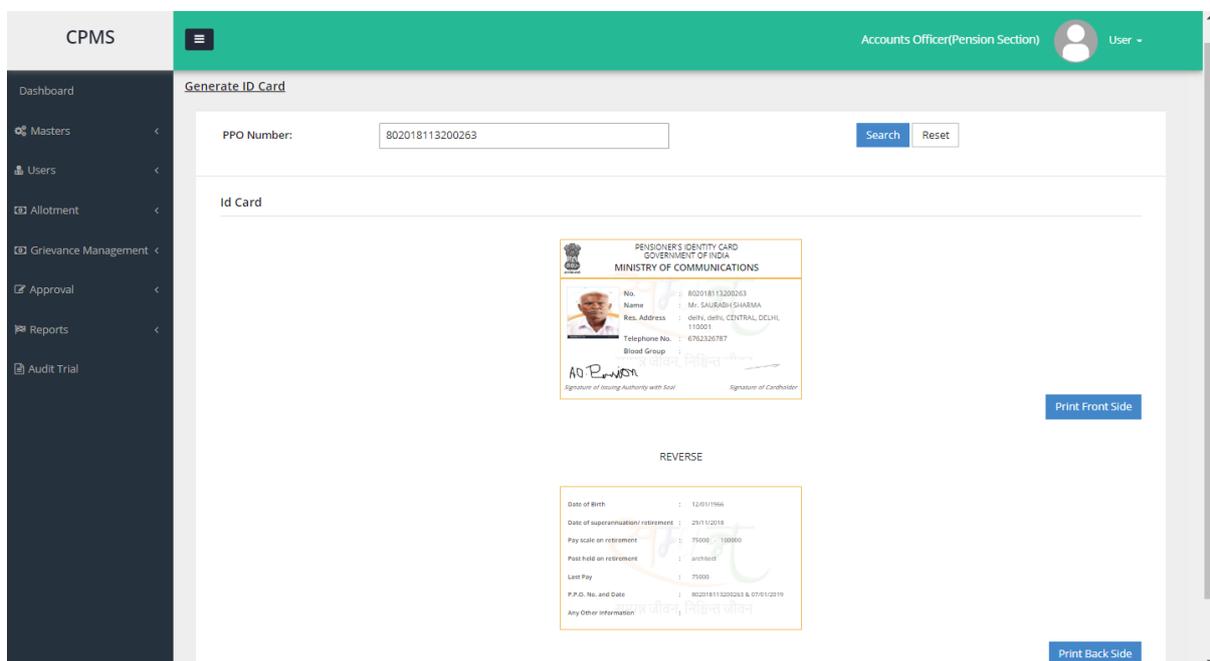
9.2 Generate ID Card

- Again login with AO Pension go to the **Masters**→ **Generate ID Card**.
- Here Fill the PPO number of pensioner and click on the Search button. (Fig 9.4)



(Fig 9.4)

- Now you can take the print of ID Card by clicking on the “Print Front side” and “Print Back Side” button, as shown in below figure. (Fig 9.5)



(Fig 9.5)

Chapter 10

10. Revision

Under revision module, there are 5 categories of revision (shown in Fig 10)

1. Revision in the rate of DA: Due to change of DA as on Date of retirement, the DCRG shall get revised and the differential amount of DCRG shall be due to be paid. For this sanction for payment shall be issued by Pension section and PDA shall make payment. Any impact on pension payable has to be separately calculated and paid in the next monthly bill.
2. Revision on account of withheld amount: On receipt of sanction for release of full/part payment of Withheld amount, this revision shall be processed.
3. Revision of pension to family pension (f.p) on account of death (When No eligible f.p. is mentioned in the PPO): In case when claimant name is not mentioned in the PPO, then revision shall be done. Under this, PPO shall be issued by Pension section.
4. Revision of pension to f.p on account of death (when eligible f.p. is mentioned in PPO) In case when claimant name is mentioned in the PPO, then revision shall be done however as previous PPO will suffice, no fresh PPO shall be issued in such case.
5. Revision of pension due to pay change/Court matter: Due to change in Pay details or service details arising out of Court order then, the Revision shall be processed.

Fig (10)

It is , currently ,mandatory that the Revision should only be done by the same DH Pension user who make entry of the case earlier in the CPMS.

10.1 Revision in the rate of DA

This type of revision is used when there is a change in the DA Rate. **No fresh sanction for HoO for this case shall be required.**

Steps for this revision are as follows: -

- First of all, login with the DH Pension
- Go to the Revision -> Revision of Pension tab Fig (10.1.b).

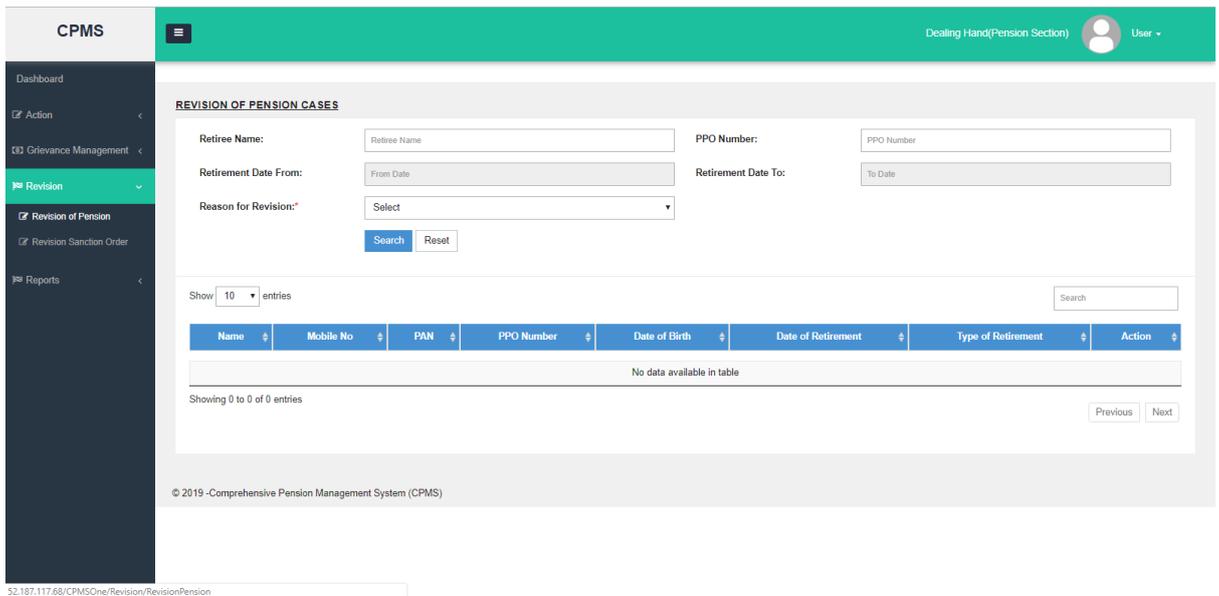


Fig (10.1.b)

- Here fill in PPO No and select the “Reason for Revision” Fig (10.1.c).

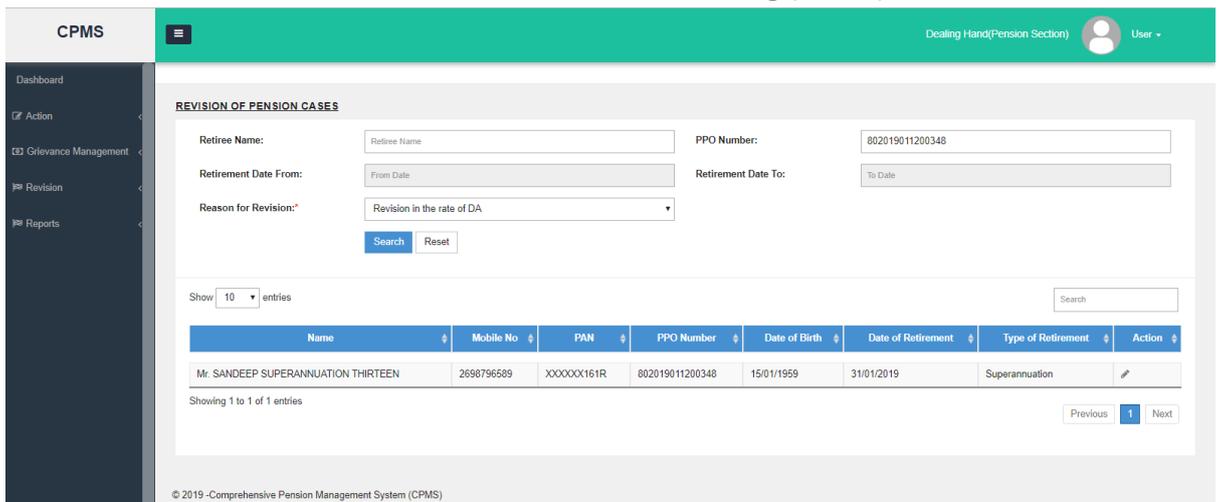


Fig (10.1.c)

- Now click on the edit button (pencil icon) in last Action column.
- Then next screen opens, here check the details and then click on the “Send to Revision Sanction order” button and enter w.e.f. date Fig (10.1.d).

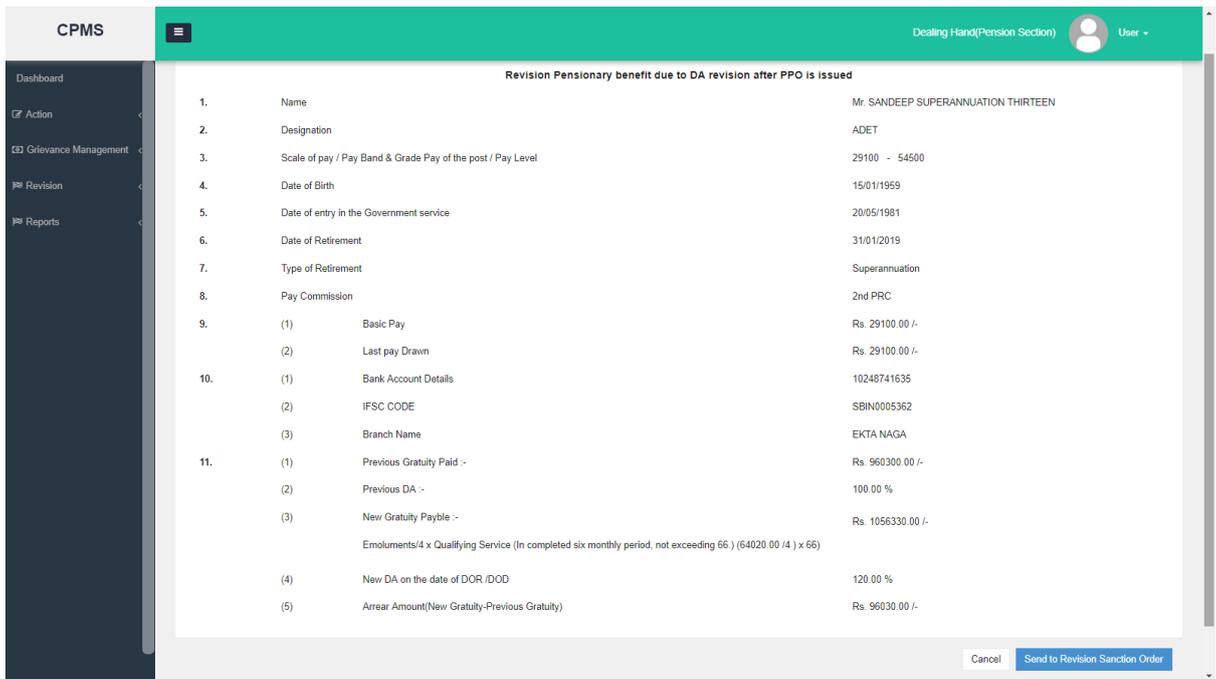


Fig (10.1.d)

- Now Go to-> Revision->Revision Sanction Order tab shown in Fig (10.1.e)

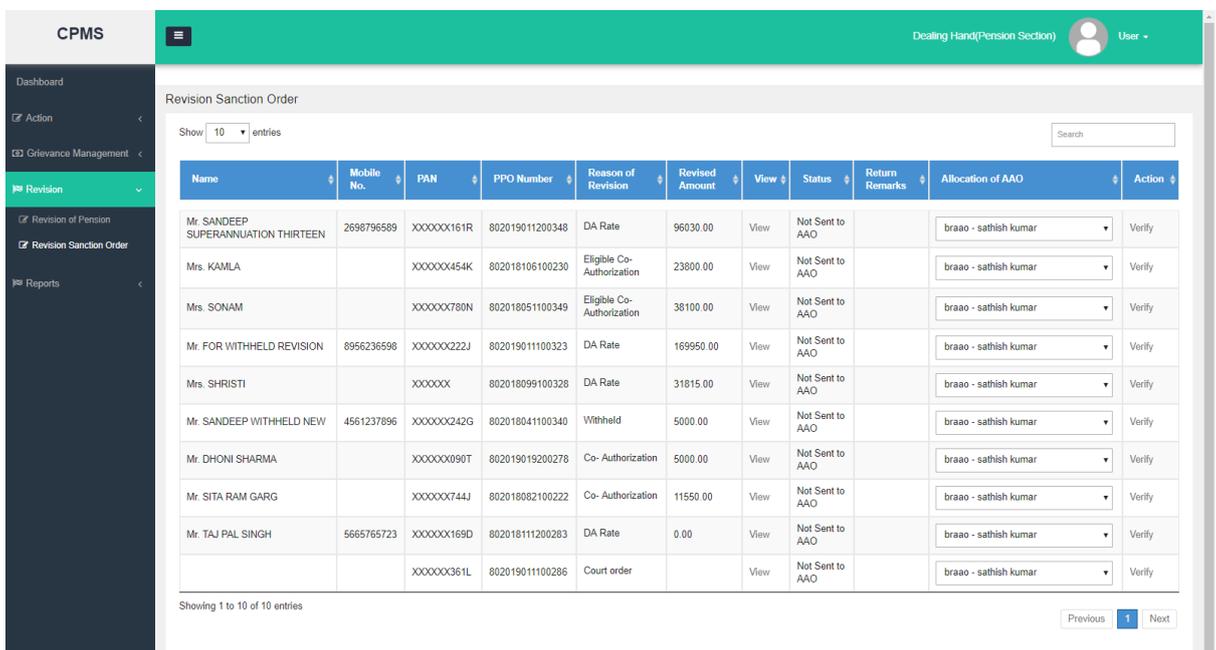


Fig (10.1.e)

- From this screen you can view the Sanction order, by clicking on the View link Fig (10.1.e). Also you can take the printout of this Sanction Order Fig (10.1.f).

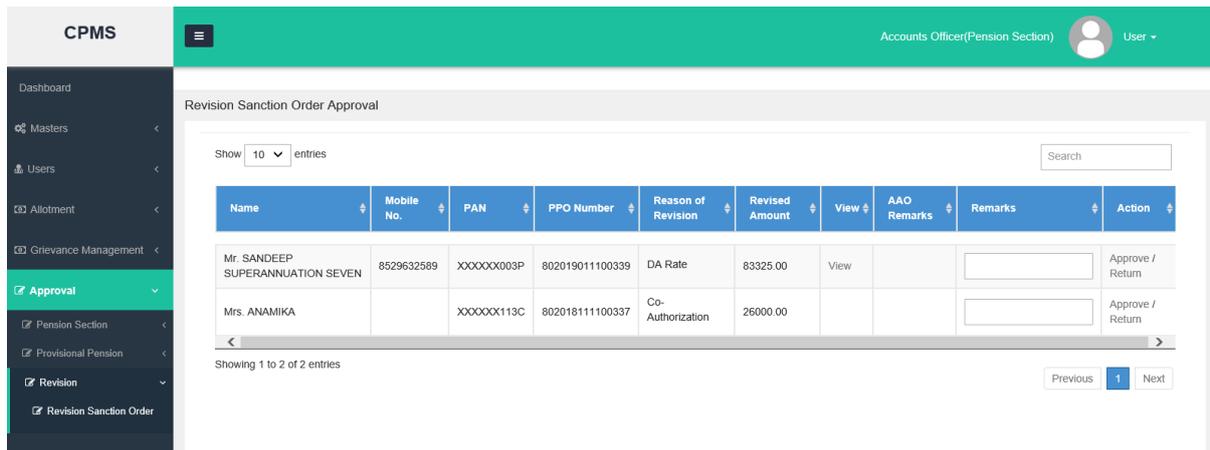


Fig (10.1.h)

- Click on View link to see or take the print of the Sanction Order, attach the DSc in the system for digital signature and click on the Approve link. At this stage, Digitally signed authority shall get generated.
- Now login with AO PDA, Go to->Allotment->Allotment To PDA DH Fig (10.1.i)

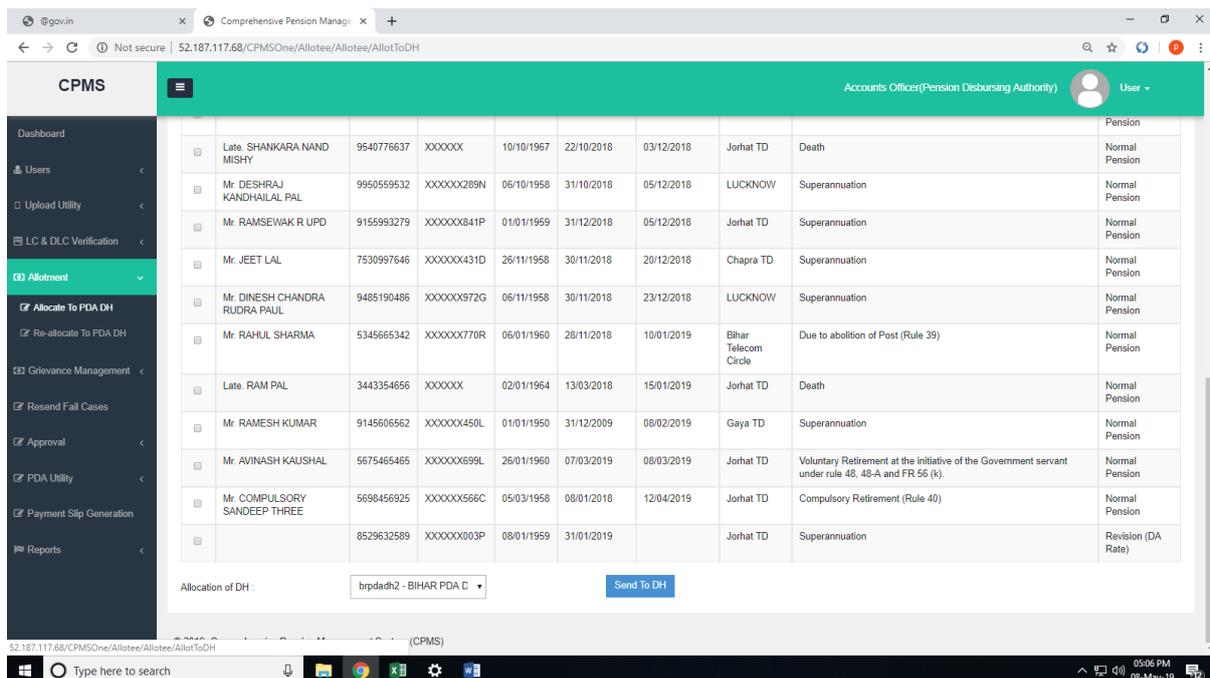


Fig (10.1.i)

- Now select the case, Allot the case to the PDA DH by selecting the respective DH from the dropdown list and Click on “Send To DH” button.
- After this login with PDA DH, Go to ->Bill Generation->Revision, Fig (10.1.j)

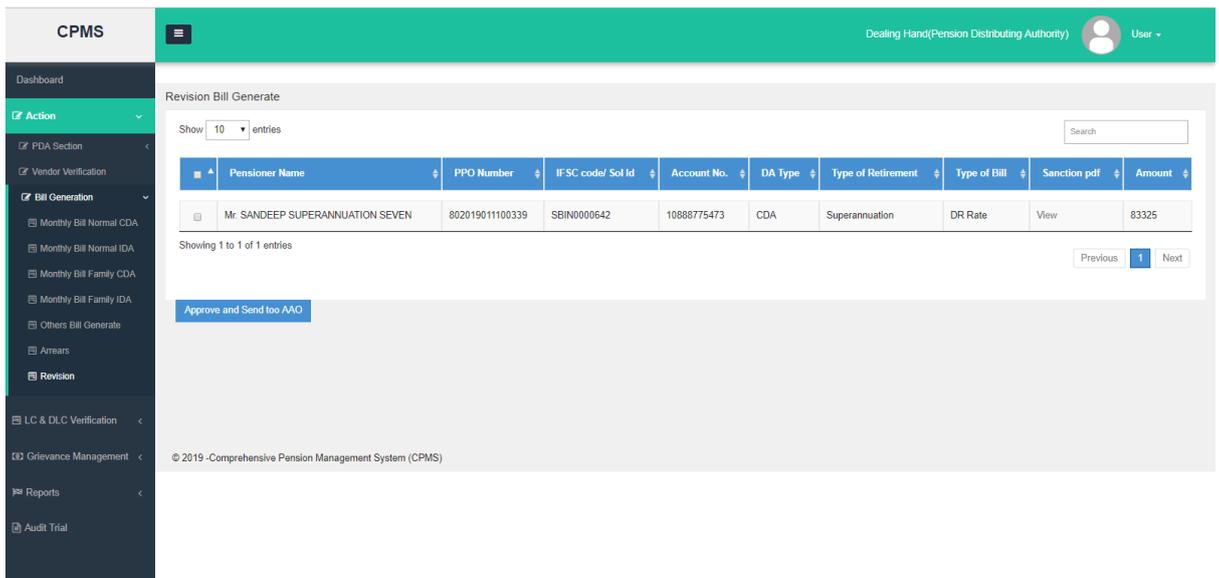


Fig (10.1.j)

- Select the Record and Click on the “Approve and Send to AAO” button, Fig (10.1.j).
- Now login with AAO PDA, Go to->Approval->PDA->Revision, Fig (10.1.k)

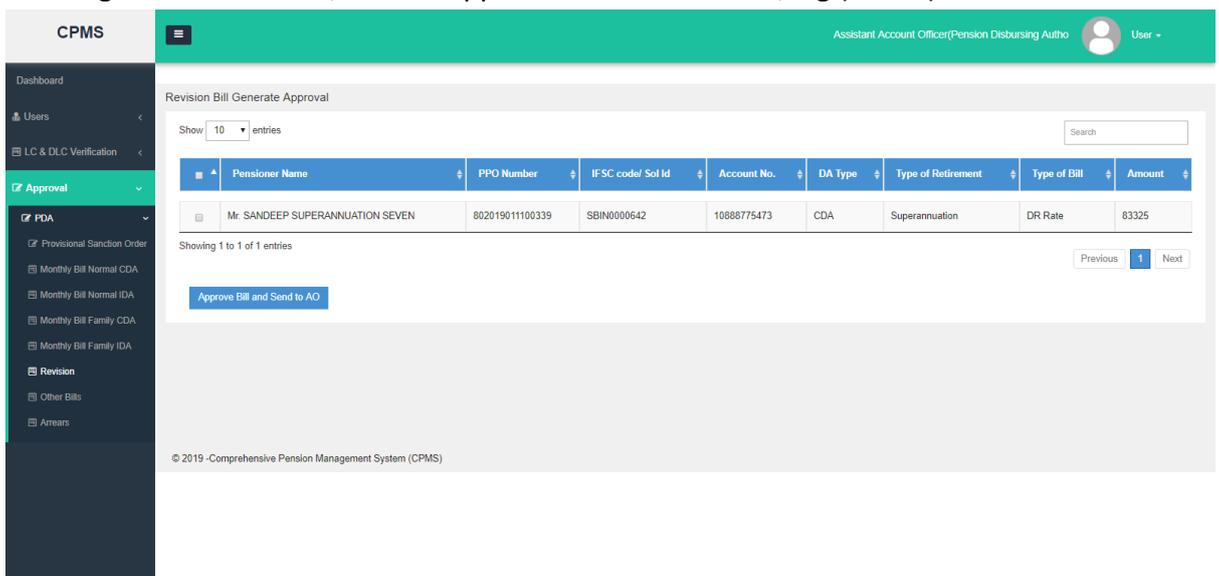


Fig (10.1.k)

- Now select the record and click on the “Approve Bill and Send to AO”.
- After this login from PDA AO, Go to->Approval->PDA->Revision Fig (10.1.l)

Revision Bill Generate Approval

Account Head Code: Normal CDA

Show 10 entries

	Pensioner Name	PPO Number	IFSC code/ Sol Id	Account No.	DA Type	Type of Retirement	Type of Bill	Amount	Error Description
<input type="checkbox"/>	Mr. MUNESH KUMAR SHARMA	802018101100226	SBIN0002665	10727160680	CDA	Superannuation	With held	1000	
<input type="checkbox"/>	Mr. SANDEEP SUPERANNUATION SEVEN	802019011100339	SBIN0000642	10888775473	CDA	Superannuation	DR Rate	83325	
<input type="checkbox"/>	Mr. INVALID GAURAV THREE	802018015100308	SBIN0000642	10888711055	CDA	Invalid Pension/Invalidment on medical ground (Rule 38)	DR Rate	8332	Supplied unique identifiers not found for corresponding request source

Showing 1 to 3 of 3 entries

Enter Not Payable Before Date: 08/05/2019

© 2019 - Comprehensive Pension Management System (CPMS)

Fig (10.1.l)

- Select the Account Head from the dropdown, then it shows the respective records, then fill the “Enter Not Payable Before Date” and click on the Approve Bill button.
- After this record will show in PFMS for payment. Monthly Bill shall remain unchanged.

10.2 Revision Due to Withheld Amount

This type of revision is used when there is a withheld amount of DCRG in r/o pensioner and sanction for release of full amount/part amount has been received from HoO. Steps for this revision are as follows: -

- First of all, login with the DH Pension
- Go to the Revision -> Revision of Pension tab Fig (10.2.b).

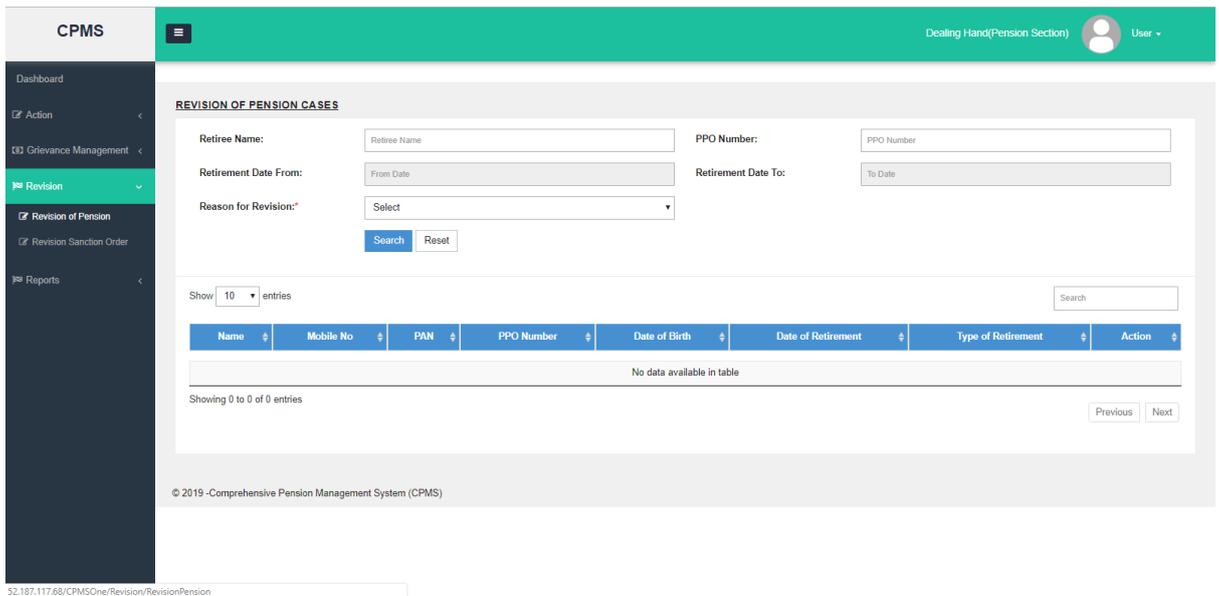


Fig (10.2.b)

- Here fill all required information like PPO No and select the “Reason for Revision” Fig (10.2.c).

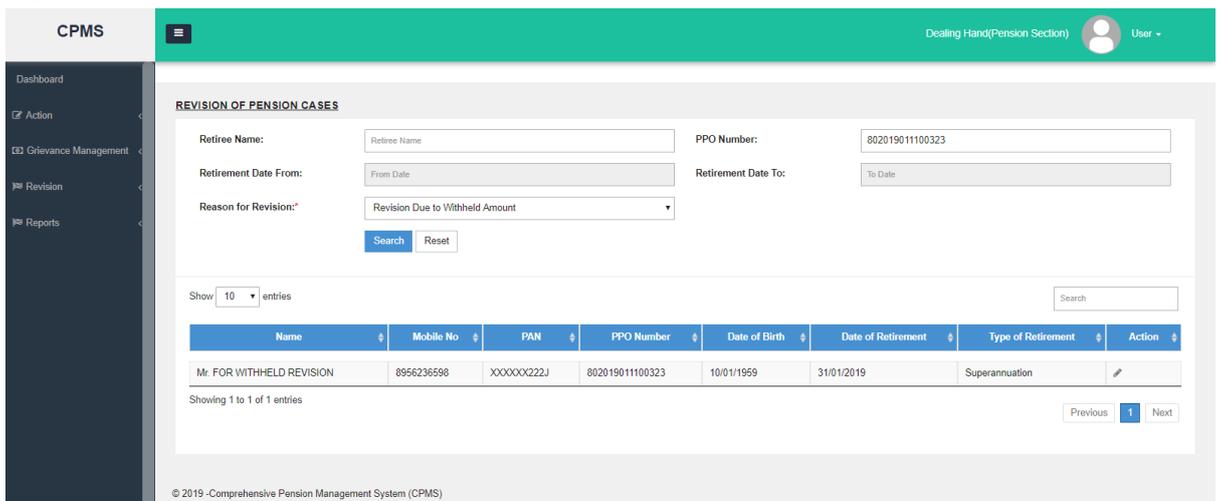


Fig (10.2.c)

- Now click on the edit button (pencil icon) in last Action column.
- Then next screen opens, here Fill the ‘Recoveries From Withheld amount’ (11.(3)) and then click on the “Send to Revision Sanction order” button Fig (10.2.d) and enter reason for withheld.

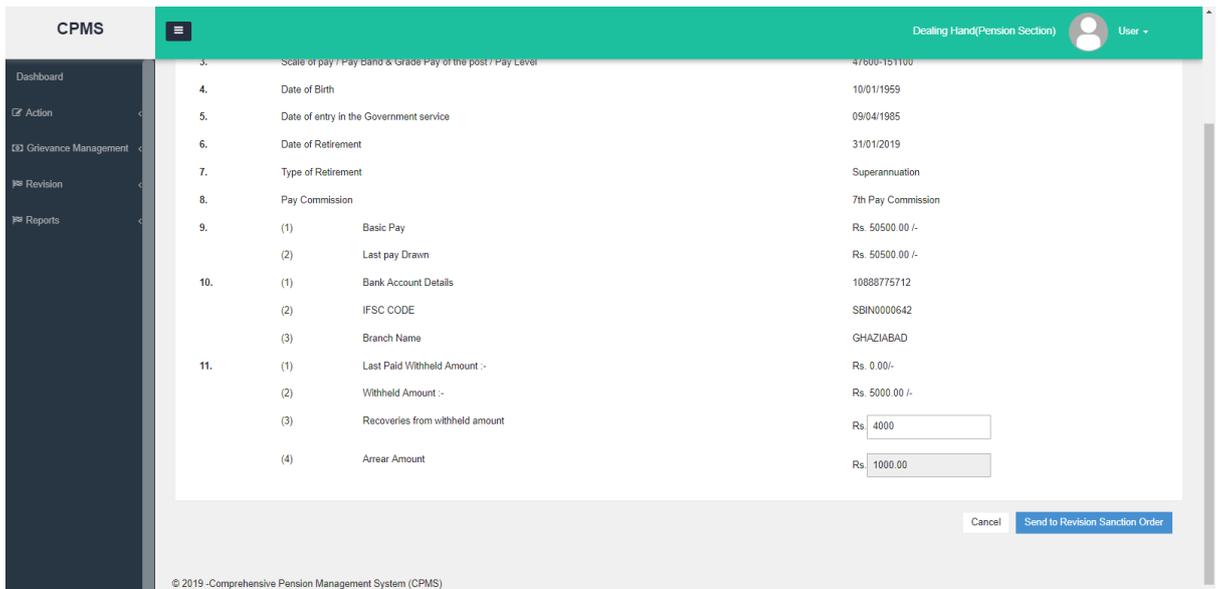


Fig (10.2.d)

- Now Go to-> Revision->Revision Sanction Order tab shown in Fig (10.2.e)

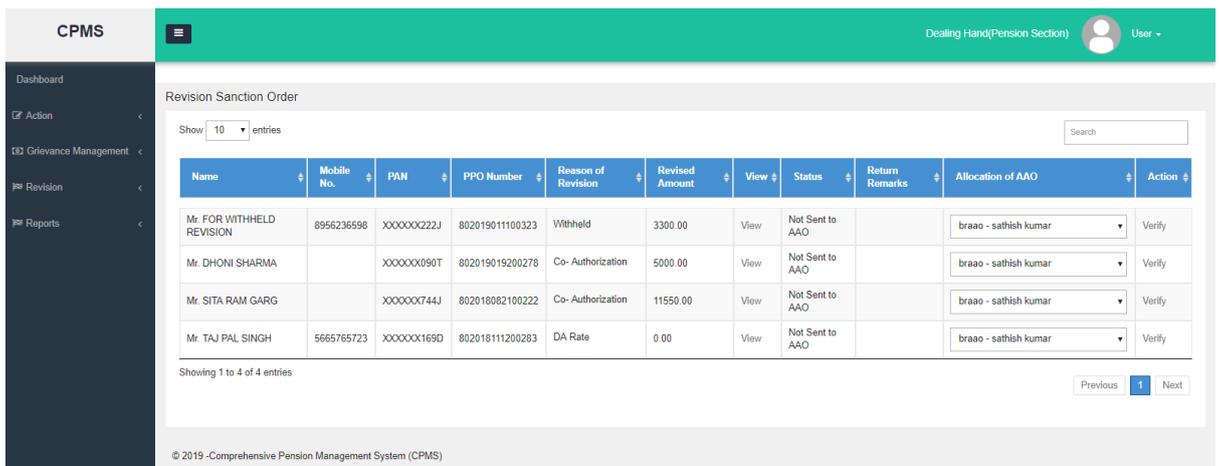


Fig (10.2.e)

- From this screen you can view the Sanction order, by clicking on the View Link Fig (10.2.e). Also you can take the printout of this Sanction Order Fig (10.2.f).

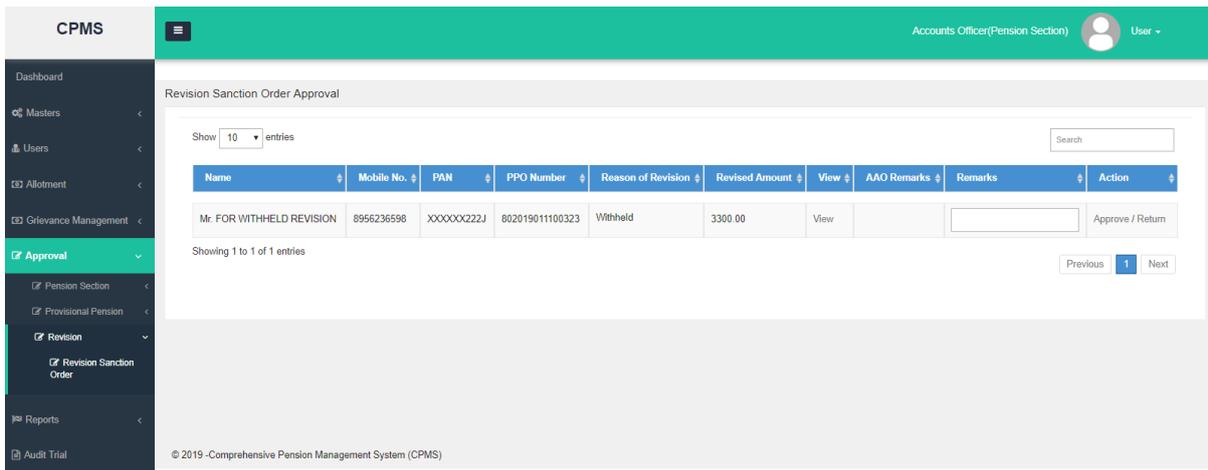


Fig (10.2.h)

- Click on View link to see or take the print of the Sanction Order, attach the DSC in the system for digital signature and click on the Approve link.
- Now login with AO PDA, Go to->Allotment->Allotment To PDA DH Fig (10.2.i)

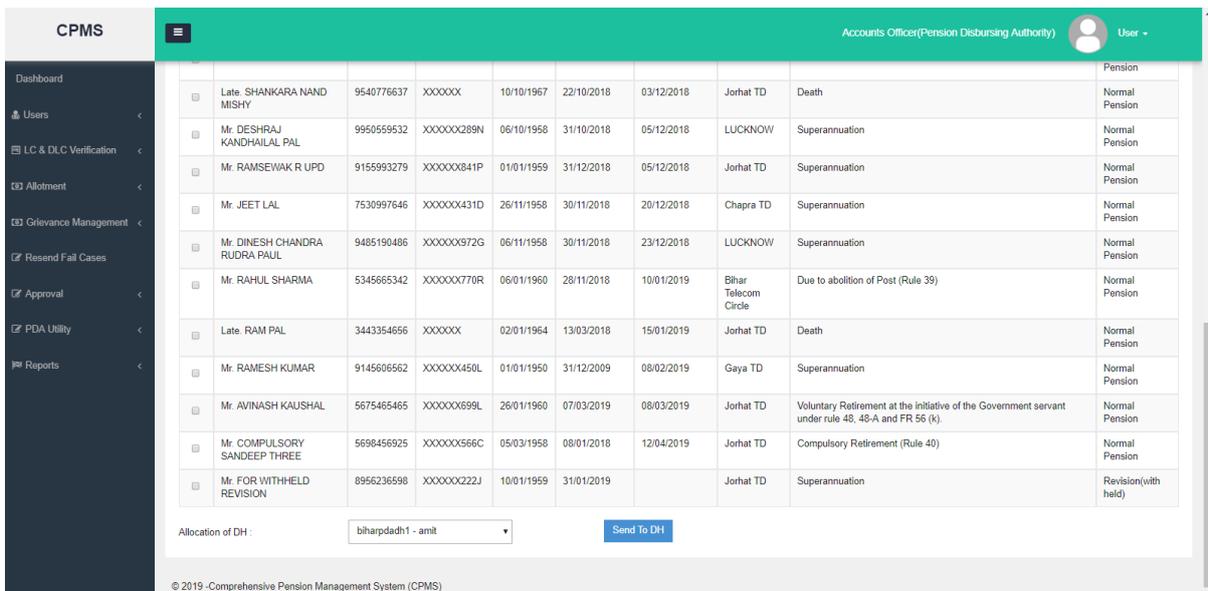


Fig (10.2.i)

- Now select the record and Allot the case to the PDA DH by selecting the respective DH from the dropdown list and Click on “Send To DH” button.
- After this login with PDA DH, Go to ->Bill Generation->Revision, Fig (10.2.j)

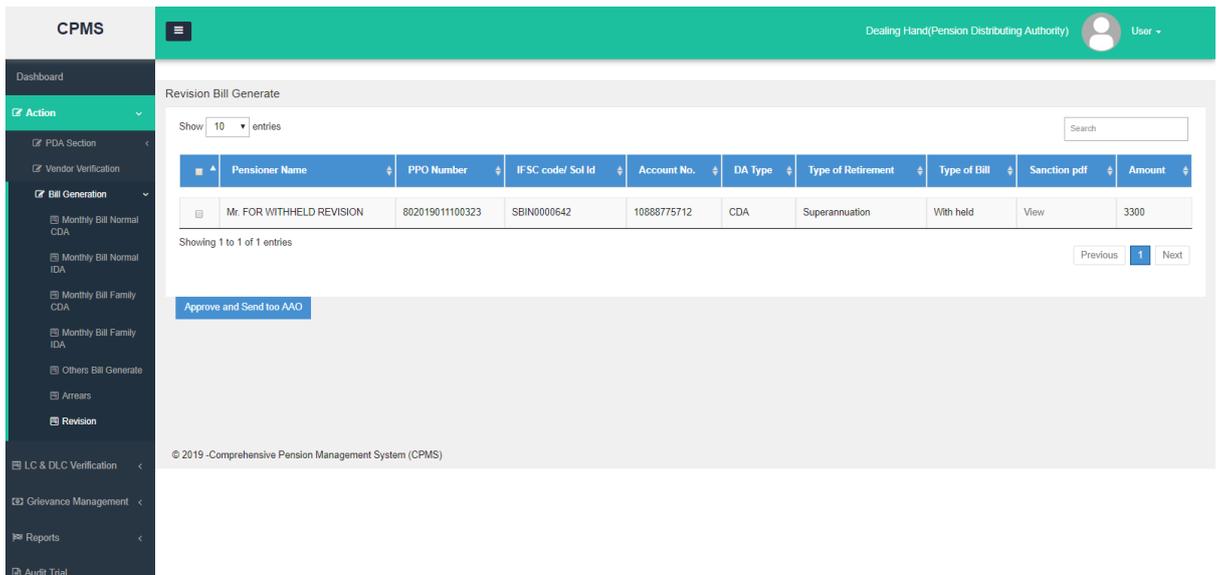


Fig (10.2.j)

- Select the Record and Click on the “Approve and Send to AAO” button, Fig (10.2.j).
- Now login with AAO PDA, Go to->Approval->PDA->Revision, Fig (10.2.k)

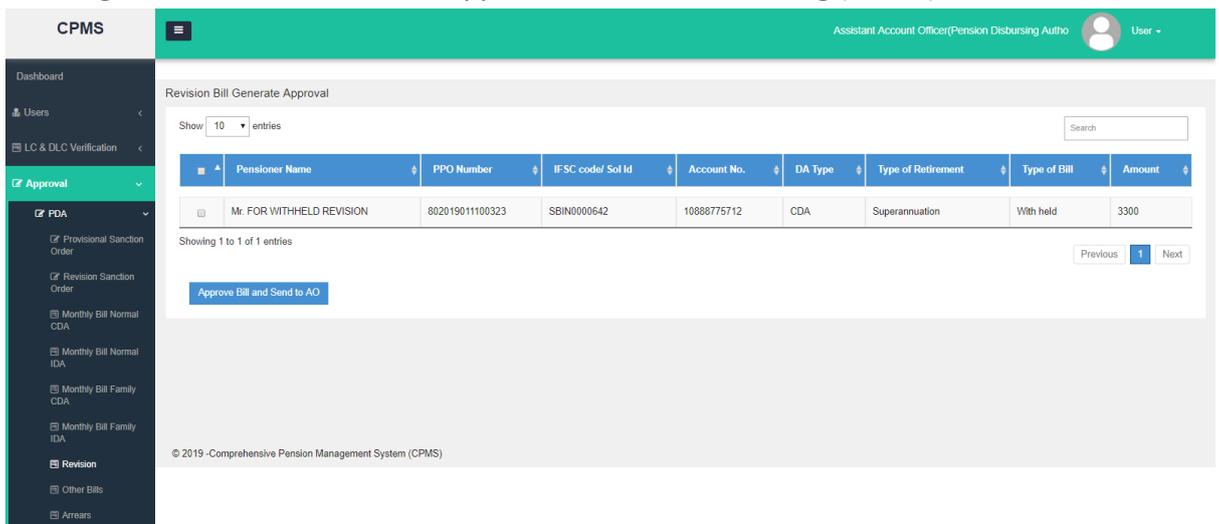


Fig (10.2.k)

- Now select the record and click on the “Approve Bill and Send to AO”.
- After this login from PDA AO, Go to->Approval->PDA->Revision Fig(10.2.l)

CPMS Accounts Officer(Pension Disbursing Authority) User

Revision Bill Generate Approval

Account Head Code: Normal CDA

Show 10 entries

#	Pensioner Name	PPO Number	IFSC code/Sol Id	Account No.	DA Type	Type of Retirement	Type of Bill	Amount	Error Description
1	Mr. MUNESH KUMAR SHARMA	802018101100226	SBIN0002665	10727160680	CDA	Superannuation	With held	1000	
2	Mr. FOR WITHHELD REVISION	802019011100323	SBIN0000642	10888775712	CDA	Superannuation	With held	3300	
3	Mr. INVALID GAURAV THREE	802018015100308	SBIN0000642	10888711055	CDA	Invalid Pension/Invalidment on medical ground (Rule 38)	DR Rate	8332	Supplied unique identifiers not found for corresponding request source

Showing 1 to 3 of 3 entries

Enter Not Payable Before Date:

© 2019 -Comprehensive Pension Management System (CPMS)

52.187.117.68/CPMSOne/Approval/PDAApproval/RevisionBillGenerateApproval

Fig (10.2.I)

- Now select the Account Head from the dropdown, then it shows the respective records, then fill the “Enter Not Payable Before Date” and click on the Approve Bill button.
- After this record will show in PFMS for payment. Monthly Bill shall remain unchanged.

10.3 Revision on account of Pay revision/Court Order

This type of revision is used when there is a revision in the pay /court order. For this sanction shall be issued by HoO and sent to Pension section.

Steps for this revision are as follows: -

- First of all, login with the DH Pension
- Go to the Revision -> Revision of Pension tab Fig (10.3.b).

CPMS

Dealing Hand(Pension Section) User

Dashboard

Action

Grievance Management

Revision

Revision of Pension

Revision Sanction Order

Reports

REVISION OF PENSION CASES

Retiree Name: PPO Number:

Retirement Date From: Retirement Date To:

Reason for Revision*:

Show 10 entries

Name	Mobile No	PAN	PPO Number	Date of Birth	Date of Retirement	Type of Retirement	Action
No data available in table							

Showing 0 to 0 of 0 entries

© 2019 -Comprehensive Pension Management System (CPMS)

32.187.117.68/CPMSOne/Revision/RevisionPension

Fig (10.3.b)

- Here fill all required information like PPO No and select the “Reason for Revision”
Fig (10.3.c)

CPMS

Dealing Hand(Pension Section) User

Dashboard

Action

Grievance Management

Revision

Reports

REVISION OF PENSION CASES

Retiree Name: PPO Number:

Retirement Date From: Retirement Date To:

Reason for Revision*:

Show 10 entries

Name	Mobile No	PAN	PPO Number	Date of Birth	Date of Retirement	Type of Retirement	Action
Mr. SANDEEP SUPERANNUATION NINE	5298416905	XXXXXX942N	802018101100342	15/10/1958	31/10/2018	Superannuation	<input type="button" value="Edit"/>

Showing 1 to 1 of 1 entries

© 2019 -Comprehensive Pension Management System (CPMS)

Fig (10.3.c)

- Now click on the edit button (pencil icon) in last Action column.
- Then next screen opens, here fill the all required details. DH should enter the following requisite parameters:
 - New AE
 - New Last Pay Drawn
 - New Qualifying Service

In case any figure remains unchanged then the original value has to be fed.
- System will then calculate the revised pension, commutation (if any) and gratuity (if any) and the additional amount. **Also, if some data entry has been wrongly entered, Press cancel.** Once satisfied, Press SAVE.

- Sanction Order will then be generated and it will be available in **revision sanction order Tab**. DH may view the sanction order. *Once a case is at this stage, it cannot be edited.*

CPMS Dealing Hand(Pension Section) User

Revision on account of pay revision/Court order

1.	Name	Mr. SANDEEP SUPERANNUATION NINE
2.	Designation	AAO
3.	Scale of pay / Pay Band & Grade Pay of the post / Pay Level	47600-151100
4.	Date of Birth	15/Oct/1958
5.	Date of entry in the Government service	10/Apr/1980
6.	Date of Retirement	31/Oct/2018
7.	Type of Retirement	Superannuation
8.	Pay Commission	7th Pay Commission
9.	(1) AE	Rs. 55200.00
	(2) Revised AE	Rs. <input type="text"/>
	(3) Last pay Drawn	Rs. 55200.00
	(4) Revised Last pay Drawn	Rs. <input type="text"/>
	(5) Net Qualifying Services	<input type="text"/> YEAR <input type="text"/> MONTH <input type="text"/> DAY
10.	(1) Bank Account Details	10888724586
	(2) IFSC CODE	SBIN000642
	(3) Branch Name	GHAZIABAD

Fig (10.3.d)

CPMS Dealing Hand(Pension Section) User

Revision on account of pay revision/Court order

1.	Name	Mr. SANDEEP SUPERANNUATION NINE
2.	Designation	AAO
3.	Scale of pay / Pay Band & Grade Pay of the post / Pay Level	47600-151100
4.	Date of Birth	15/Oct/1958
5.	Date of entry in the Government service	10/Apr/1980
6.	Date of Retirement	31/Oct/2018
7.	Type of Retirement	Superannuation
8.	Pay Commission	7th Pay Commission
9.	(1) AE	Rs. 55200.00
	(2) Revised AE	Rs. <input type="text" value="60000.00"/>
	(3) Last pay Drawn	Rs. 55200.00
	(4) Revised Last pay Drawn	Rs. <input type="text" value="60000.00"/>
	(5) Net Qualifying Services	<input type="text" value="38"/> YEAR <input type="text" value="6"/> MONTH <input type="text" value="22"/> DAY
10.	(1) Bank Account Details	10888724586
	(2) IFSC CODE	SBIN000642
	(3) Branch Name	GHAZIABAD

Fig (10.3.d)

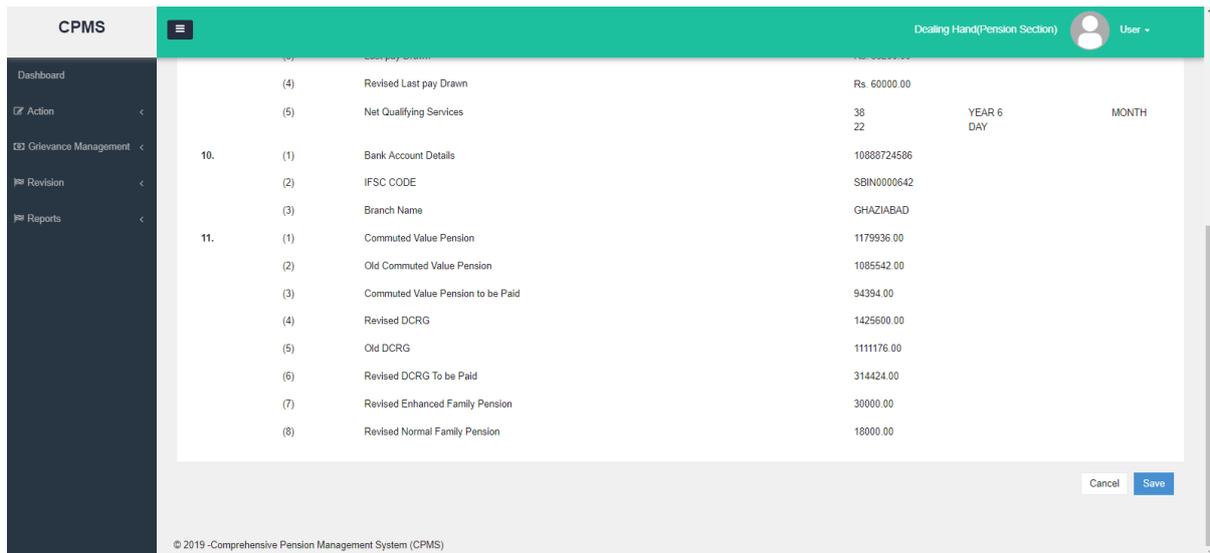


Fig (10.3.d)

- Now Go to-> Revision->Revision Sanction Order tab shown in Fig (10.3.e)

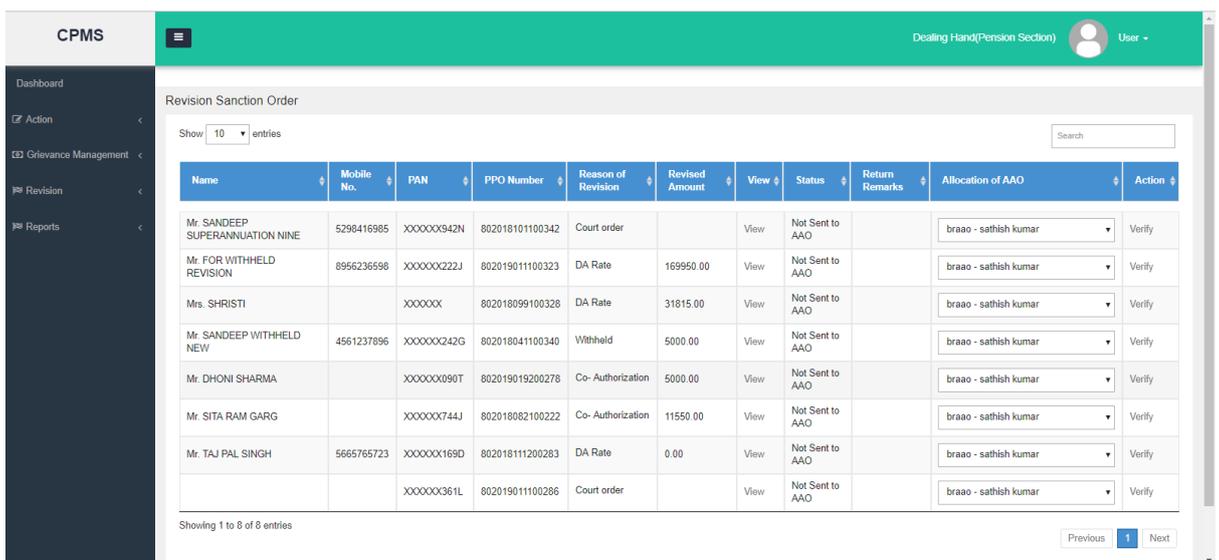


Fig (10.3.e)

- From this screen you can view the Sanction order, by clicking on the View link Fig (10.3.e). Also you can take the printout of this Sanction Order Fig (10.3.f).

The screenshot shows the CPMS web application interface. The top navigation bar includes the CPMS logo and the user's role: Accounts Officer (Pension Disbursing Authority). The left sidebar contains various menu items such as Dashboard, Users, Upload Utility, LC & DLC Verification, Allotment, Grievance Management, Resend Fail Cases, Approval, PDA Utility, Payment Slip Generation, and Reports. The main content area displays a table of pensioners with the following data:

Name	ID	DOB	Retirement Date	Location	Reason	Pension Status
Mr. RAMSEWAK R UPD	9155993279	XXXXXX841P	01/01/1959	Jorhat TD	Superannuation	Normal Pension
Mr. JEET LAL	7530997646	XXXXXX431D	26/11/1958	Chapra TD	Superannuation	Normal Pension
Mr. DINESH CHANDRA RUDRA PAUL	9485190486	XXXXXX972G	06/11/1958	LUCKNOW	Superannuation	Normal Pension
Mr. RAHUL SHARMA	5345665342	XXXXXX770R	06/01/1960	Bihar Telecom Circle	Due to abolition of Post (Rule 39)	Normal Pension
Late. RAM PAL	3443354656	XXXXXX	02/01/1964	Jorhat TD	Death	Normal Pension
Mr. RAMESH KUMAR	9145606562	XXXXXX450L	01/01/1950	Gaya TD	Superannuation	Normal Pension
Mr. AVINASH KAUSHAL	5675465465	XXXXXX699L	26/01/1960	Jorhat TD	Voluntary Retirement at the initiative of the Government servant under rule 48, 48-A and FR 56 (k).	Normal Pension
Mr. COMPULSORY SANDEEP THREE	5698456925	XXXXXX566C	05/03/1958	Jorhat TD	Compulsory Retirement (Rule 40)	Normal Pension
	5236985632	XXXXXX480E	09/04/1958	Jorhat TD	Superannuation	Revision(with held)
Mr. SANDEEP SUPERANNUATION NINE	5298416985	XXXXXX942N	15/10/1958	Jorhat TD	Superannuation	Court Order

Below the table, there is a dropdown menu for 'Allocation of DH' with the selected value 'biharpdadh1 - amt' and a 'Send To DH' button.

Fig (10.3.i)

- Now Allot the case to the PDA DH by selecting the respective DH from the dropdown list and Click on “Send To DH” button.
- After this login with PDA DH, Go to ->Action->PDA Section->Revision Sanction Order, Fig (10.3.j)
- DH PDA must view and save a digital copy of the Sanction Order and take requisite printouts, so that copy can be sent to HoO , pensioner, Pension section apart one office copy(after updation of date of restoration of 2nd commutation after completion of steps till point 10). **The copy will not be available at any other screen, so saving a digital copy is mandatory.**
- PDA section shall manually calculate the amount of arrears to be paid on account of the revision of pension from date of retirement till the current month. Also, For the month, pro rate calculation has to be done manually.
- The arrear amount may be fed in the monthly bill of the current month, if not paid already, and pushed from DH to AAO. **Once the file moves from sanction received stage, the pension of current month will not be available at DH level any more. So the monthly bill for current month should be pushed with the arrear from DH to AAO.** The monthly bill can be paid as per rules. After completion of above, DH PDA will now generate the bill for the above sanction order and send the generated bills namely commutation and gratuity to cash after three level passing.

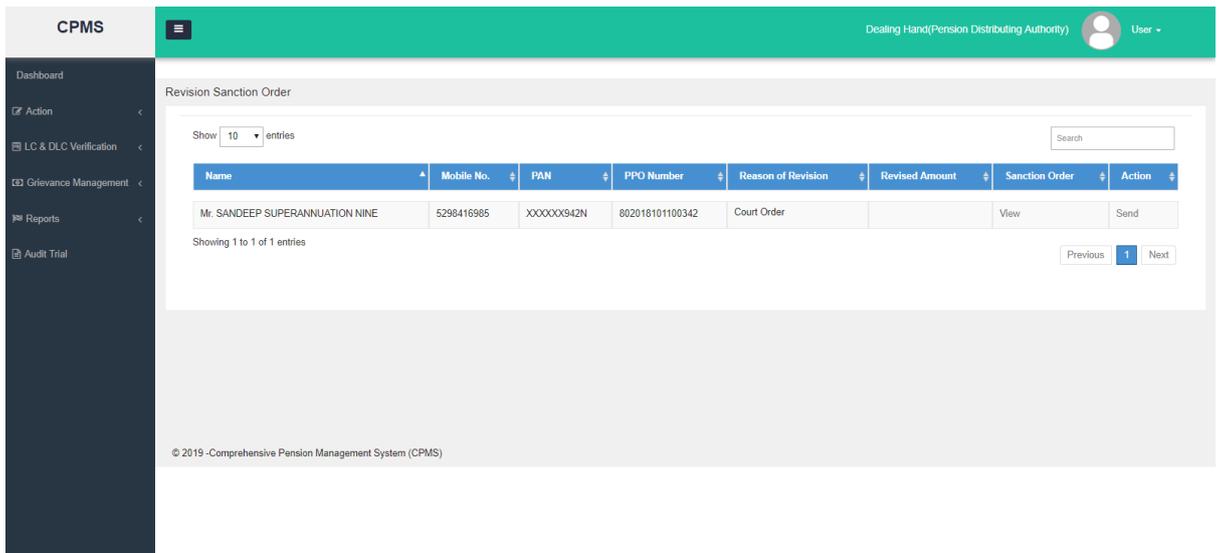


Fig (10.3.j)

- Click on the Send button in front of the record.
- Now Go to->Action->Bill Generation->Revision.
- Select the Record and Click on the “Approve and Send to AAO” button.
- Now login with AAO PDA, Go to->Approval->PDA->Revision, Fig (10.3.k)

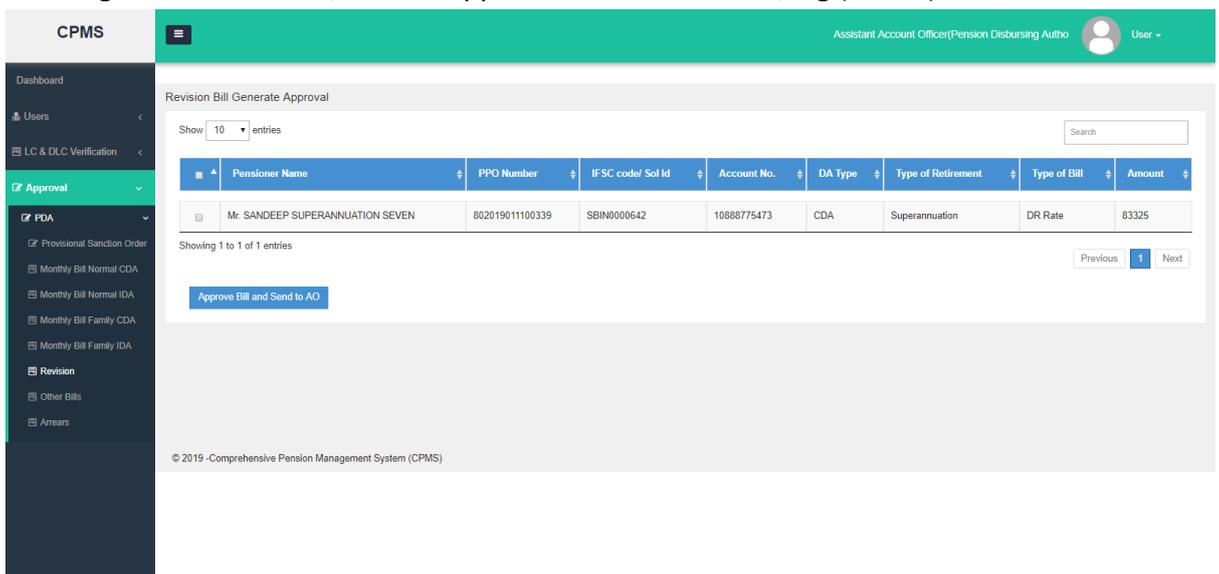


Fig (10.3.k)

- Now select the record and click on the “Approve Bill and Send to AO”.
- After this login from PDA AO, Go to->Approval->PDA->Revision Fig (10.3.l)

Revision Bill Generate Approval

Account Head Code: Normal CDA

Show 10 entries

	Pensioner Name	PPO Number	IFSC code/ Sol Id	Account No.	DA Type	Type of Retirement	Type of Bill	Amount	Error Description
<input type="checkbox"/>	Mr. MUNESH KUMAR SHARMA	802018101100226	SBIN0002665	10727160680	CDA	Superannuation	With held	1000	
<input type="checkbox"/>	Mr. SANDEEP SUPERANNUATION SEVEN	802019011100339	SBIN0000642	10888775473	CDA	Superannuation	DR Rate	83325	
<input type="checkbox"/>	Mr. INVALID GAURAV THREE	802018015100308	SBIN0000642	10888711055	CDA	Invalid Pension/Invalidment on medical ground (Rule 38)	DR Rate	8332	Supplied unique identifiers not found for corresponding request source

Showing 1 to 3 of 3 entries

Enter Not Payable Before Date: 08/05/2019

© 2019 - Comprehensive Pension Management System (CPMS)

Fig (10.3.l)

- Now select the Account Head from the dropdown, then it shows the respective records, then fill the “Enter Not Payable Before Date” and click on the Approve Bill button.
- After this record will show in PFMS for payment. The Commutation/ DCRG amount shall be paid by Cash the same day when AO PDA send it and same shall be used for arriving at the date of restoration of 2nd commutation and shall be updated in revision copy mentioned in point 6.
- After successful payment, LC and DLC will get refreshed and respective dates will be entered for the pensioner.
- Thereafter, the monthly bill in for current month lying at AAO shall be pushed with NPB date to AO and then to Cash for payment.
- The monthly pension of following months(including current month) will come as per revised pension.

10.4 Revision of Pension to FP (No eligible family member mentioned in PPO)

This type of revision will be done when after the death of pensioner, **the claimant’s name is not mentioned in the PPO**. In such case, revision shall be initiated after form 14 with enclosure is **duly forwarded by HOO** along with sanction of payment manually.

Documents that will be required to be submitted in this case shall be

1. Death certificate of Pensioner(s)
2. Life certificate/DLC of the claimant
3. Mandate form/cancelled cheque and undertaking

4. Duly filled form 14 with enclosures.

If there is a case where though the claimant name is not mentioned in the PPO, but same has been added via corrigendum and uploaded via Upload utility e.g. permanently disabled children/siblings and disabled parent, then they will be processed through this type. In such cases **form 14 shall be required to be submitted to the Pension/PDA directly and no fresh sanction shall be called for.**

Documents that shall be required to be submitted in this case shall be

1. Death certificate of Pensioner(s)
2. Life certificate/DLC of the claimant
3. Mandate form/cancelled cheque and undertaking
4. Form 14 duly filled with enclosures.

Steps for this revision are as follows: -

- First of all, login with the DH Pension
- Go to the Revision -> Revision of Pension tab Fig (10.4.b).

The screenshot displays the 'REVISION OF PENSION CASES' section of the CPMS. It features a search form with the following fields:

- Retiree Name:
- PPO Number:
- Retirement Date From:
- Retirement Date To:
- Reason for Revision:

Buttons for 'Search' and 'Reset' are located below the 'Reason for Revision' field. Below the search form, there is a table with the following columns: Name, Mobile No, PAN, PPO Number, Date of Birth, Date of Retirement, Type of Retirement, and Action. The table currently displays 'No data available in table'. The interface also includes a 'Show 10 entries' dropdown and a search box for the table. The footer of the page shows the URL: 52.187.117.68/CPMSOne/Revision/RevisionPension.

Fig (10.4.b)

- Here fill all required information like PPO No and select the “Reason for Revision” Fig (10.4.c).

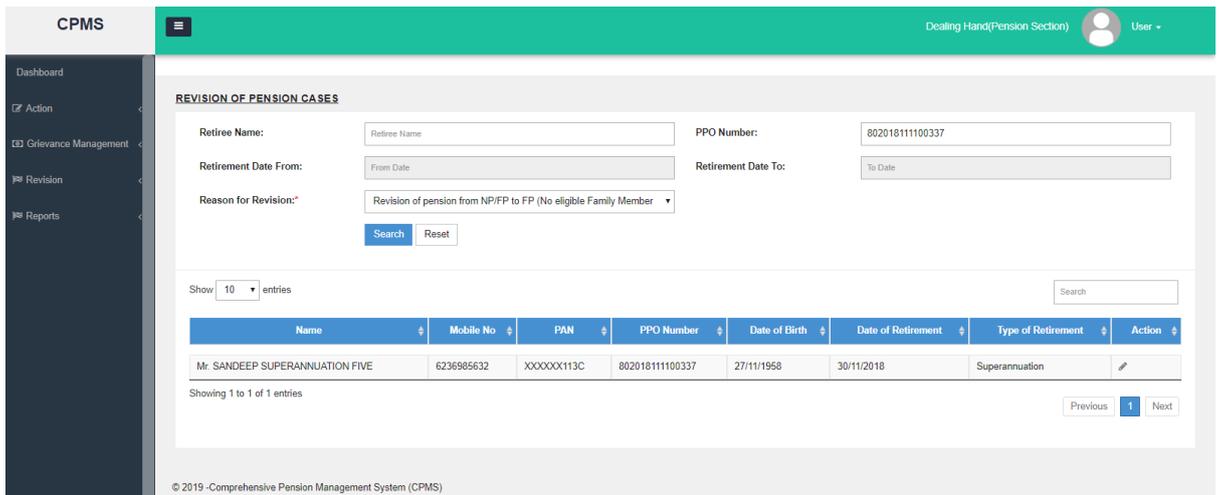
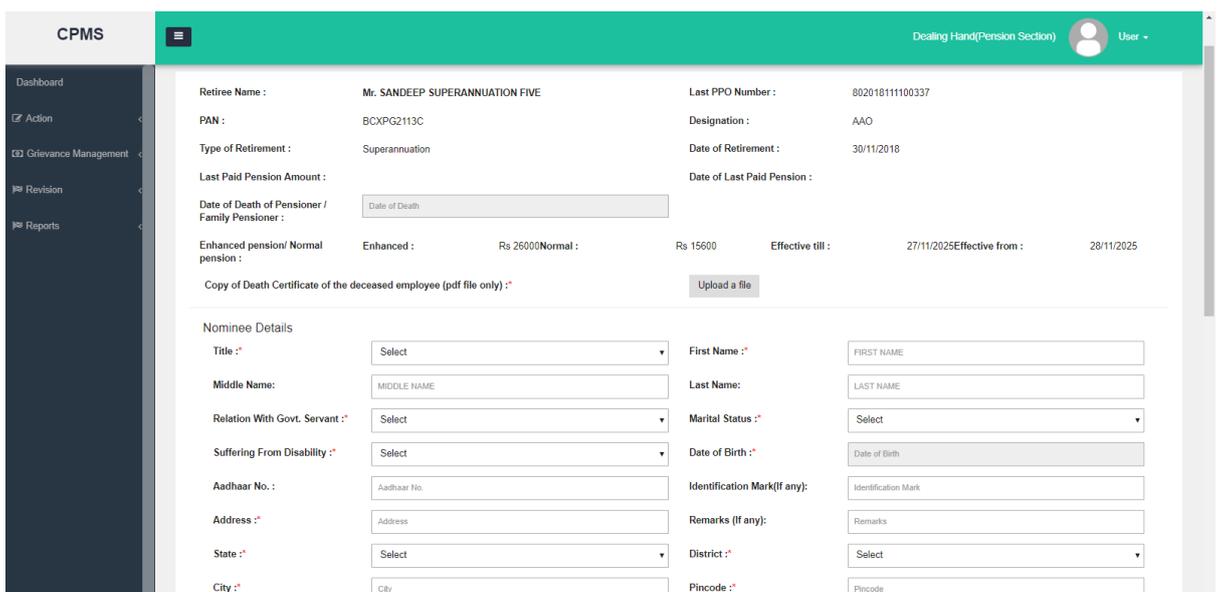


Fig (10.4.c)

- Now click on the edit button (pencil icon) in last Action column.
- Then next screen opens, here Fill all the details and then click on the “Save” button Fig (10.4.d).



Signature
Note: Size should not exceed 70 KB!! Only .JPEG,.JPG file is allowed

Bank Post Office

Bank Details

IFSC Code: SBIN000642 Branch Name: GHAZIABAD

Bank Name: STATE BANK OF INDIA Bank Account Number(Latest): 10888766048

Type of Bank Account: Single

Save Cancel

Fig (10.4.d)

- Now Go to-> Revision->Revision Sanction Order tab shown in Fig (10.4.e)

Revision Sanction Order

Show 10 entries

Name	Mobile No.	PAN	PPO Number	Reason of Revision	Revised Amount	View	Status	Return Remarks	Allocation of AAO	Action
Mrs. ANAMIKA		XXXXXX113C	80201811100337	Co- Authorization	26000.00	View	Not Sent to AAO		braao - sathish kumar	Verify
Mr. DHONI SHARMA		XXXXXX090T	802019019200278	Co- Authorization	5000.00	View	Not Sent to AAO		braao - sathish kumar	Verify
Mr. SITA RAM GARG		XXXXXX744J	802018082100222	Co- Authorization	11550.00	View	Not Sent to AAO		braao - sathish kumar	Verify
Mr. TAJ PAL SINGH	5665765723	XXXXXX169D	802018111200283	DA Rate	0.00	View	Not Sent to AAO		braao - sathish kumar	Verify

Showing 1 to 4 of 4 entries

Previous 1 Next

© 2019 - Comprehensive Pension Management System (CPMS)

Fig (10.4.e)

- From this screen you can view the Sanction order, by clicking on the View link Fig (10.4.e). Also you can take the printout of this Sanction Order Fig (10.4.f).

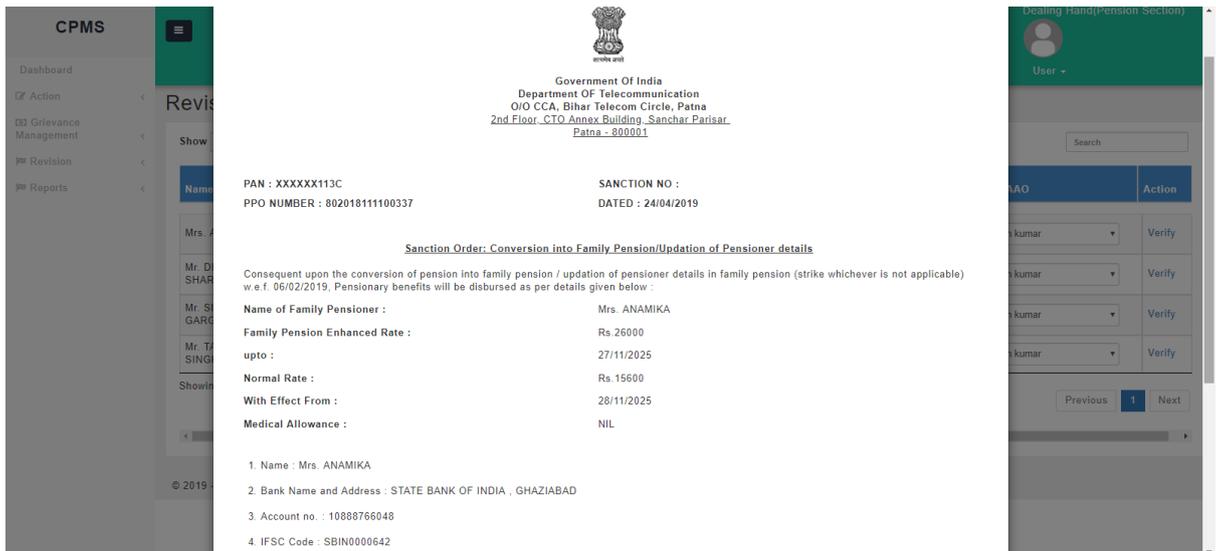


Fig (10.4.f)

- Now click on the Last Column Verify link to send record for AAO approval Fig (10.4.e).
- Now login with the AAO Pension. Go to ->Approval->Revision->Revision Sanction Order Shown in Fig (10.4.g)

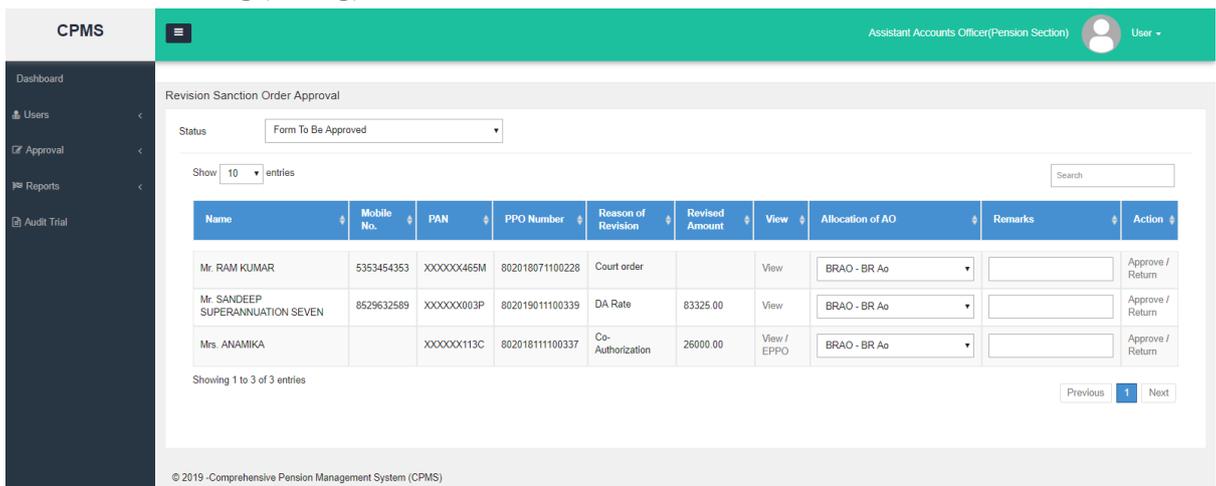
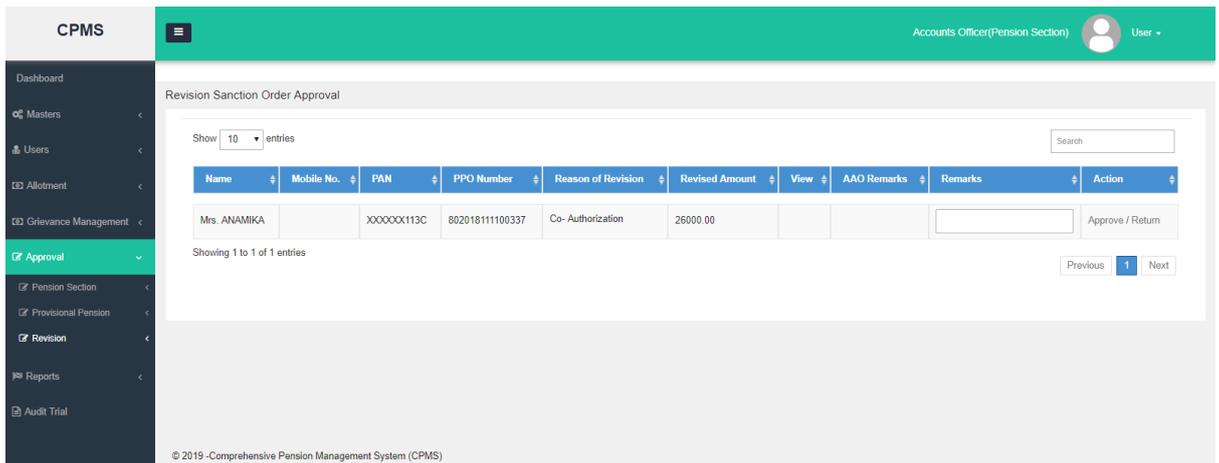


Fig (10.4.g)

- Now Click on the View link to see the Sanction order and then Approve/Return the record by click on the Approve/Return link and send record for AO approval Fig (10.4.g).
- Now login with the AO Pension (only on IE Browser).



- Go to Approval>Revision>Revision Sanction Order
- Click on View link to see or take the print of the Sanction Order, attach the DSc in the system for digital signature and click on the Approve link.
- Now login with AO PDA, Go to->Allotment->Allotment To PDA DH Fig (10.4.i)

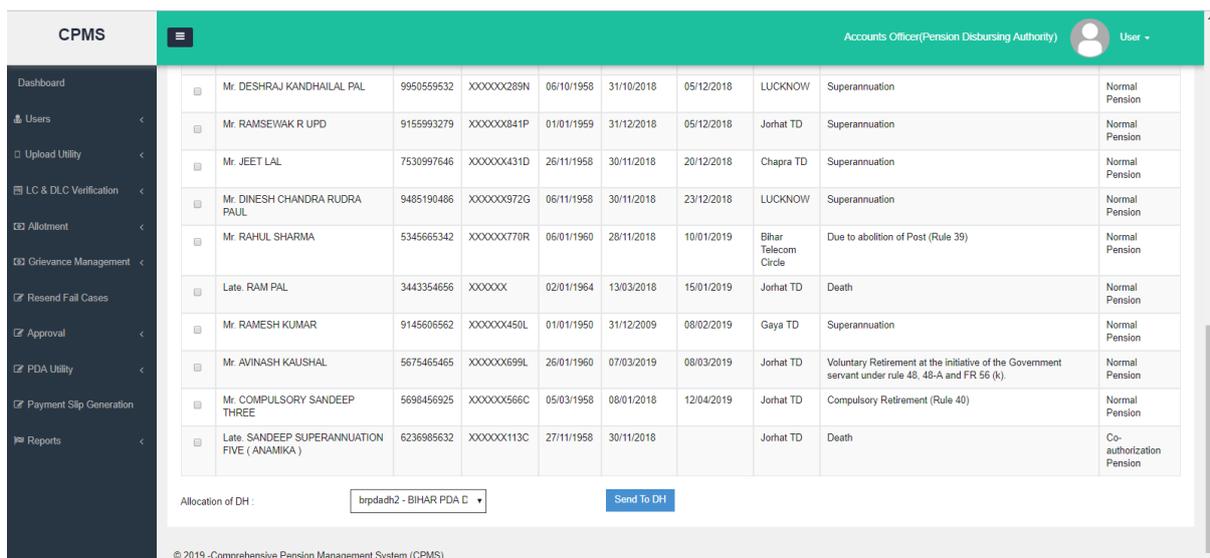


Fig (10.4.i)

- Now Allot the case to the PDA DH by selecting the respective DH from the dropdown list and Click on “Send To DH” button.
- After this login with PDA DH, Go to ->Action->PDA Section->Revision Sanction Order, Fig (10.4.j)

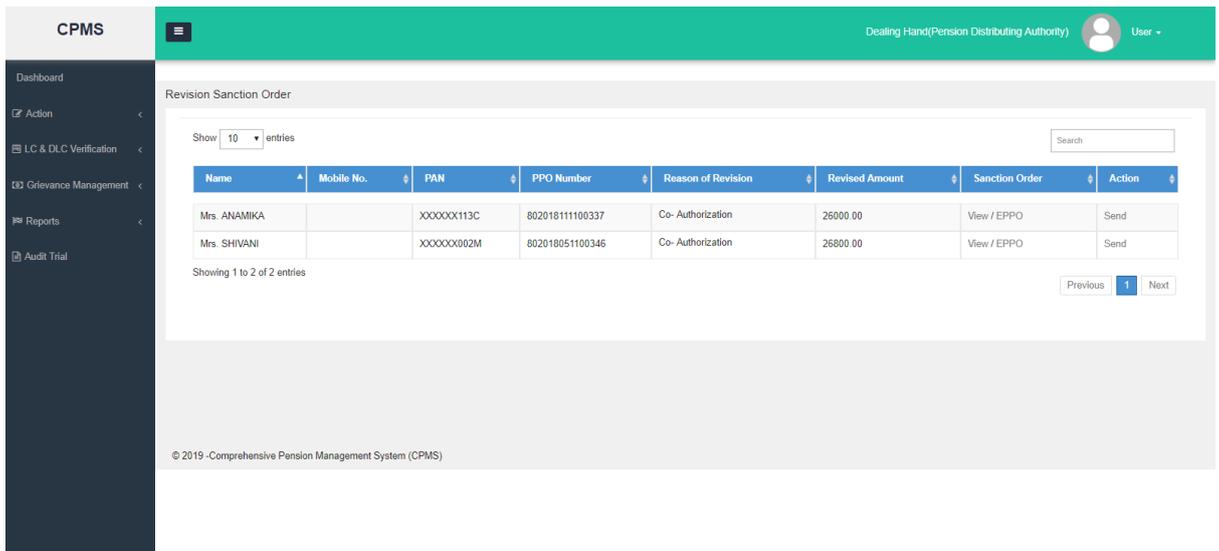


Fig (10.4.j)

- After this the record will show in Vendor Verification, GO to->Action->Vendor Verification Fig (10.4.k).

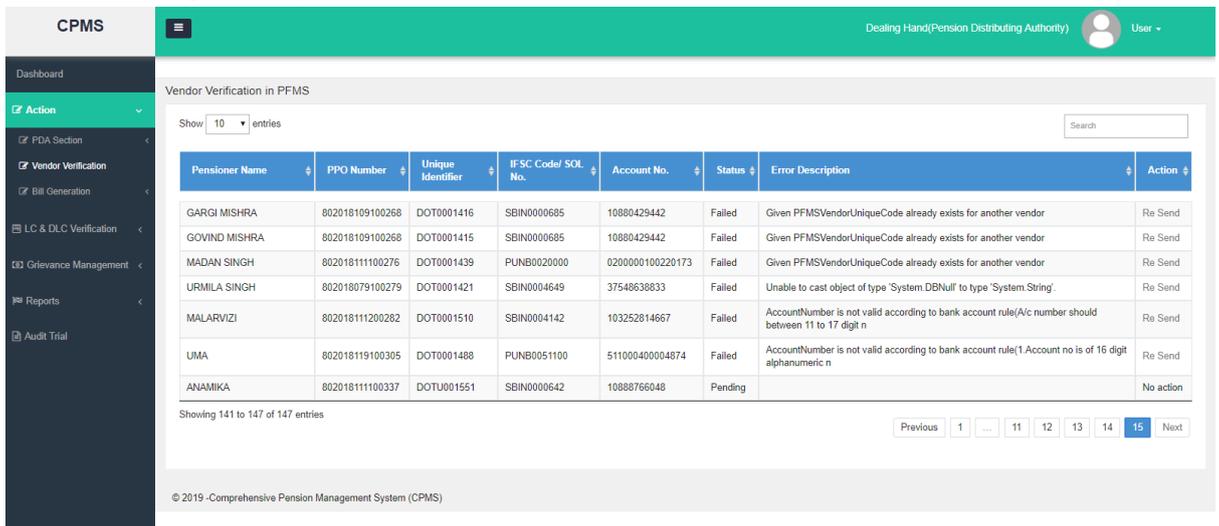


Fig (10.4.k)

- After this record will Go to->LC & DLC Verification->LC Verification, Fig (10.4.l).

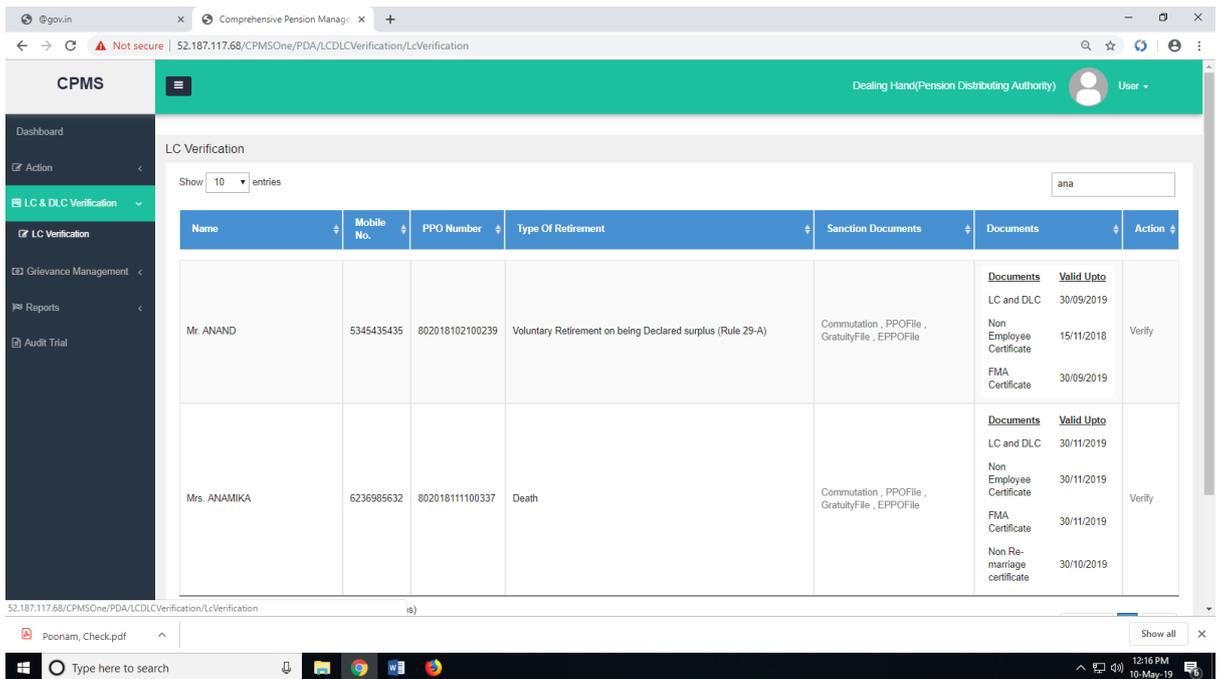
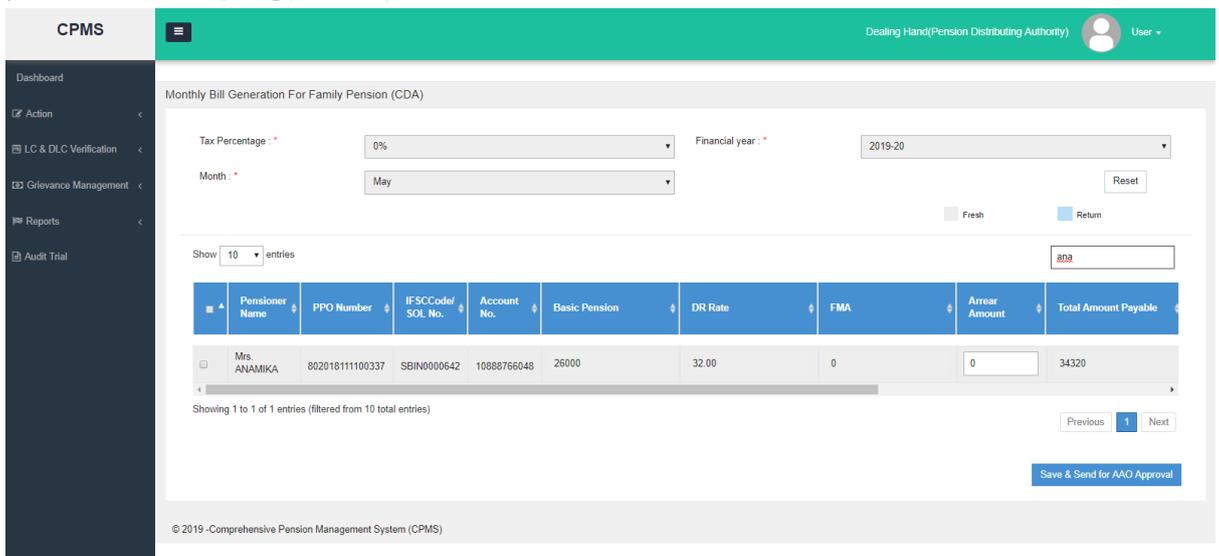


Fig (10.4.l)

- According to the dates filled in the revision module, case shall get processed.
- After this the case will show in Next month Monthly Bill (from the month you process the case), Fig(10.4.m)



Fig(10.4.m)

- Now Process the monthly bill and do payment. An assessment shall be done on account of amount payable , if any, due to delay of intimation of death , from the day following date of death till the the disbursement of 1st revised pension. Such amount shall be paid as arrear/recovery along with 1st revised pension.

10.5 Revision of Pension to FP (Eligible family member mentioned in PPO)

This type of revision will be done when after the death of pensioner, the claimant's - Spouse-name is mentioned in the PPO. In such case, documents that will be required to be submitted in this case shall be

1. Death certificate of Pensioner(s)
2. Life certificate/DLC of the claimant
3. Revised Mandate Form/Cancelled cheque and Undertaking, if not available.

Steps for this revision are as follows: -

- First of all, login with the DH Pension
- Go to the Revision -> Revision of Pension tab Fig (10.5.b).

The screenshot displays the CPMS interface for 'REVISION OF PENSION CASES'. The top navigation bar shows 'CPMS' and 'Dealing Hand(Pension Section)'. The left sidebar contains a menu with 'Revision' selected. The main form area includes the following fields:

- Retiree Name:
- PPO Number:
- Retirement Date From:
- Retirement Date To:
- Reason for Revision:

Below the form are 'Search' and 'Reset' buttons. A table below the form shows the following columns: Name, Mobile No, PAN, PPO Number, Date of Birth, Date of Retirement, Type of Retirement, and Action. The table content is empty, displaying 'No data available in table'. The footer shows '© 2019 -Comprehensive Pension Management System (CPMS)'.

Fig (10.5.b)

- Here fill all required information like PPO No and select the "Reason for Revision" Fig (10.5.c).

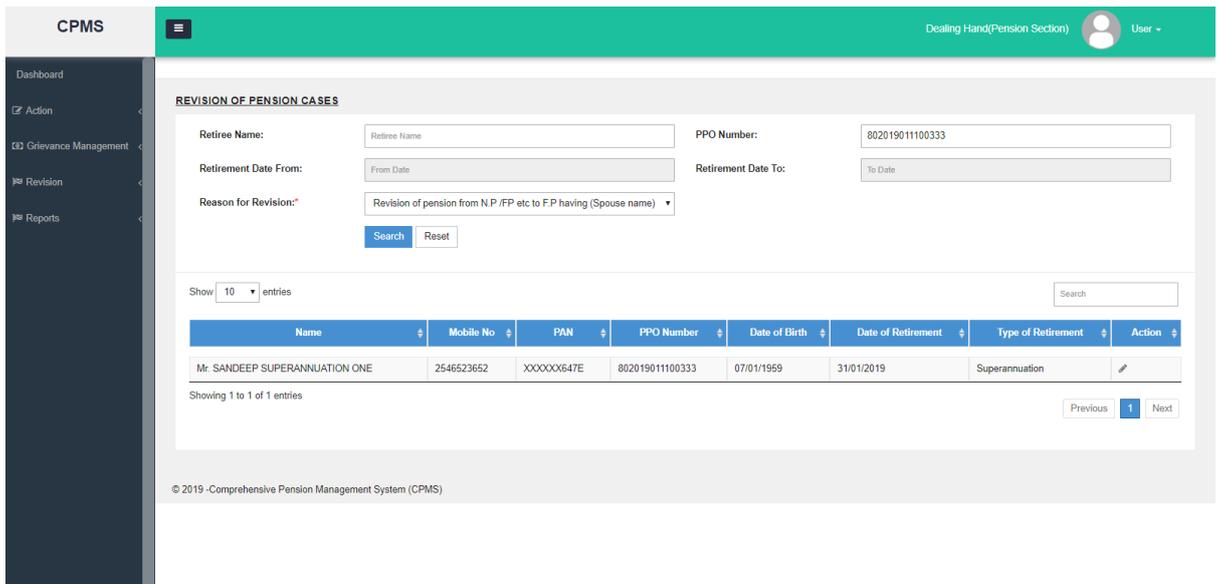


Fig (10.5.c)

- Now click on the edit button (pencil icon) in last Action column.
- Then next screen opens, here fill the required details and then click on the “Save” button Fig (10.5.d).

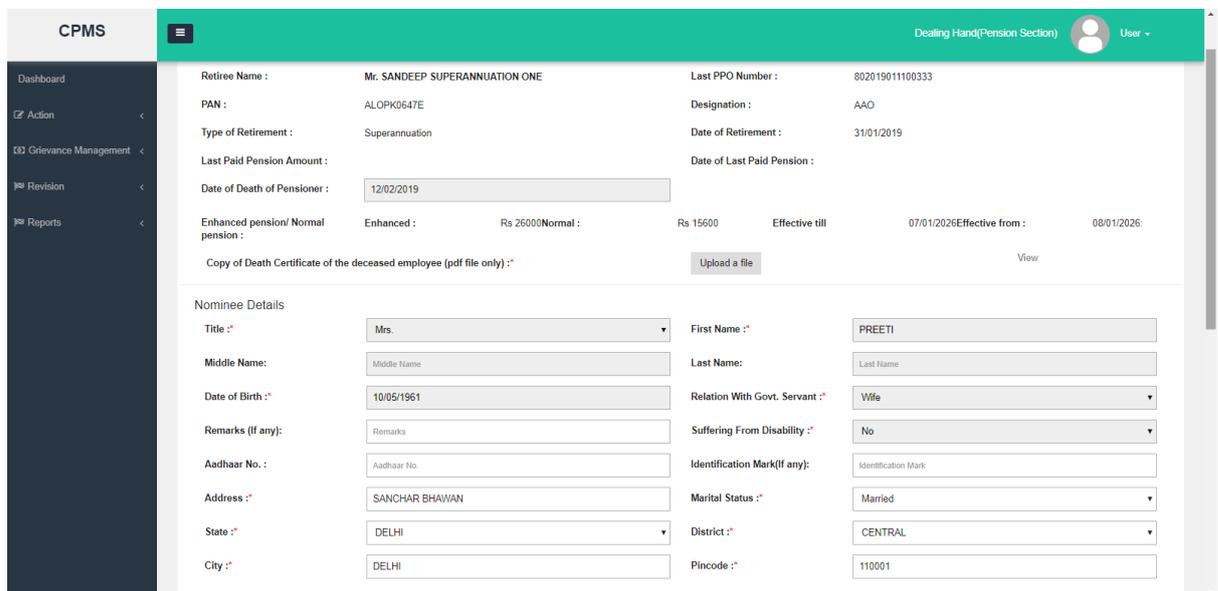


Fig (10.5.d)

- Now Go to-> Revision->Revision Sanction Order tab shown in Fig (10.5.e)

Name	Mobile No.	PAN	PPO Number	Reason of Revision	Revised Amount	View	Status	Return Remarks	Allocation of AAO	Action
Mrs. PREETI		XXXXXX647E	802019011100333	Eligible Co-Authorization	26000.00	View	Not Sent to AAO		braao - sathish kumar	Verify
Mr. DHONI SHARMA		XXXXXX090T	802019019200278	Co- Authorization	5000.00	View	Not Sent to AAO		braao - sathish kumar	Verify
Mr. SITA RAM GARG		XXXXXX744J	802018082100222	Co- Authorization	11550.00	View	Not Sent to AAO		braao - sathish kumar	Verify
Mr. TAJ PAL SINGH	5665765723	XXXXXX169D	802018111200283	DA Rate	0.00	View	Not Sent to AAO		braao - sathish kumar	Verify

Fig (10.5.e)

- From this screen you can view the Sanction order, by clicking on the View link Fig (10.5.e). Also you can take the printout of this Sanction Order Fig (10.5.f).

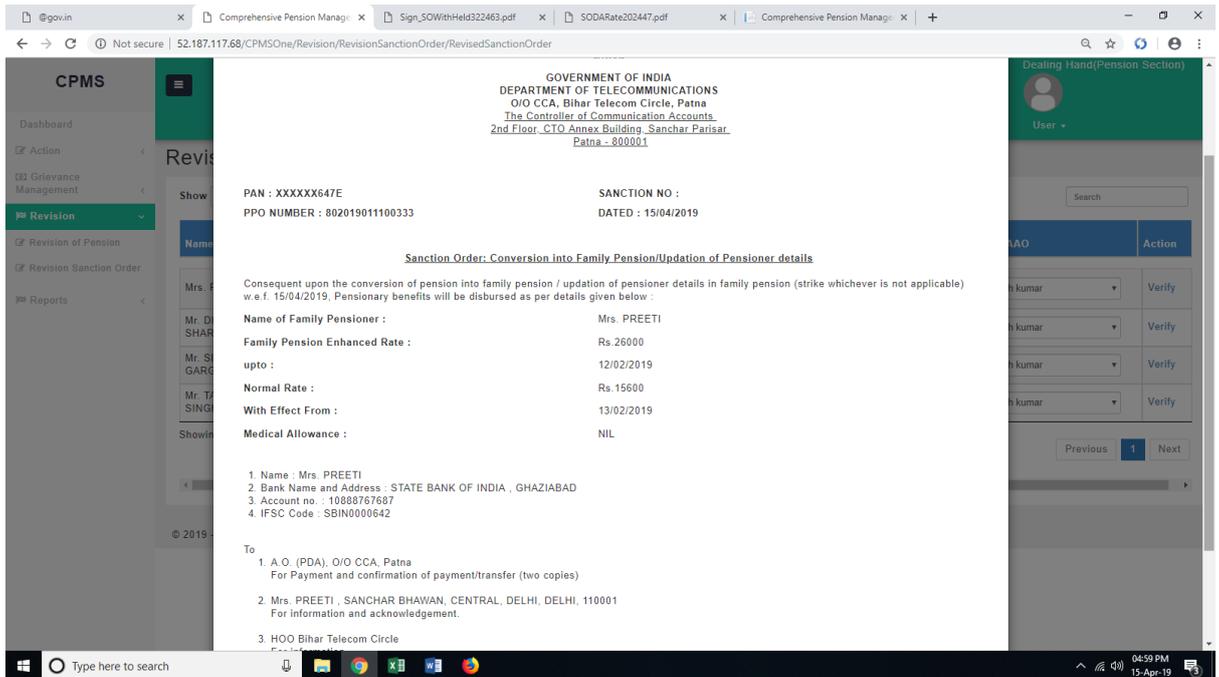


Fig (10.5.f)

- Now click on the Last Column Verify link to send record for AAO approval Fig (10.5.e).
- Now login with the AAO Pension. Go to ->Approval->Revision->Revision Sanction Order Shown in Fig (10.5.g)

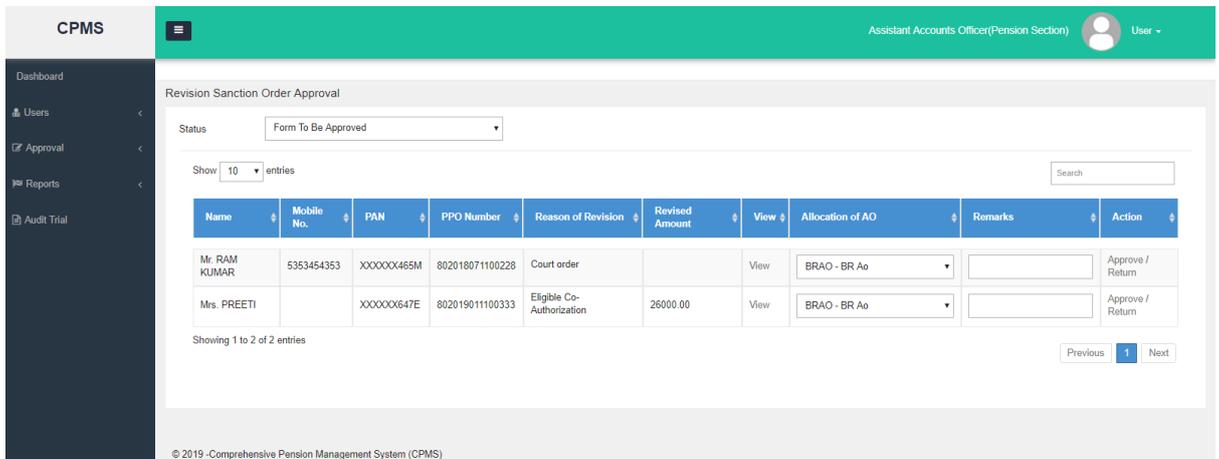


Fig (10.5.g)

- Now Click on the View link to see the Sanction order and then Approve/Return the record by click on the Approve/Return link and send record for AO approval Fig (10.5.g).
- Now login with the AO Pension (only on IE Browser).
- Go to Approval>Revision>Revision Sanction Order
- Click on View link to see or take the print of the Sanction Order, attach the DSc in the system for digital signature and click on the Approve link.
- Now login with AO PDA, Go to->Allotment->Allotment To PDA DH Fig (10.5.i)

Name	ID	DOB	Joining Date	Termination Date	Location	Reason	Pension Type
Late. OM PURI	9540776637	XXXXXX	01/12/1967	01/11/2018	10/12/2018	Jorhat TD	Death
Late. SHANKARA NAND MISHY	9540776637	XXXXXX	10/10/1967	22/10/2018	03/12/2018	Jorhat TD	Death
Mr. DESHRAJ KANDHAILAL PAL	9950569632	XXXXXXXX289N	06/10/1958	31/10/2018	05/12/2018	LUCKNOW	Superannuation
Mr. RAMSEWAK R UPD	9155993279	XXXXXXXX841P	01/01/1959	31/12/2018	05/12/2018	Jorhat TD	Superannuation
Mr. JEET LAL	7530997646	XXXXXXXX431D	26/11/1958	30/11/2018	20/12/2018	Chapra TD	Superannuation
Mr. DINESH CHANDRA RUDRA PAUL	9485190486	XXXXXXXX972G	06/11/1958	30/11/2018	23/12/2018	LUCKNOW	Superannuation
Mr. RAHUL SHARMA	5345665342	XXXXXXXX770R	06/01/1960	28/11/2018	10/01/2019	Bihar Telecom Circle	Due to abolition of Post (Rule 39)
Late. RAM PAL	3443354656	XXXXXX	02/01/1964	13/03/2018	15/01/2019	Jorhat TD	Death
Mr. RAMESH KUMAR	9145606562	XXXXXXXX450L	01/01/1950	31/12/2009	08/02/2019	Gaya TD	Superannuation
Mr. AVINASH KAUSHAL	5675465465	XXXXXXXX659L	26/01/1960	07/03/2019	08/03/2019	Jorhat TD	Voluntary Retirement at the initiative of the Government servant under rule 48, 48-A and FR 56 (k).
Mr. COMPULSORY SANDEEP THREE	5698456925	XXXXXXXX566C	05/03/1958	08/01/2018	12/04/2019	Jorhat TD	Compulsory Retirement (Rule 40)
Late. SANDEEP SUPERANNUATION ONE	2546523652	XXXXXXXX647E	07/01/1959	31/01/2019		Jorhat TD	Death

Fig (10.5.i)

- Now Allot the case to the PDA DH by selecting the respective DH from the dropdown list and Click on “Send To DH” button.
- After this login with PDA DH, Go to ->Action->PDA Section->Revision Sanction Order, Fig (10.5.j)

Name	Mobile No.	PAN	PPO Number	Reason of Revision	Revised Amount	Sanction Order	Action
Mrs. PREETI		XXXXXXXX647E	802019011100333	(IsEligible) Co- Authorization	26000.00	View	Send

Fig (10.5.j)

After this the record will for Vendor Verification, GO to->Action->Vendor Verification Fig (10.5.k)

The screenshot shows the 'Vendor Verification in PFMS' page in the CPMS system. The interface includes a sidebar with navigation options like 'Dashboard', 'Action', 'PDA Section', 'Vendor Verification', 'Bill Generation', 'LC & DLC Verification', 'Grievance Management', 'Reports', and 'Audit Trail'. The main content area displays a table with the following columns: Pensioner Name, PPO Number, Unique Identifier, IF-SC Code/ SOL No., Account No., Status, Error Description, and Action. The table lists several failed verification records for pensioners such as BRIJPAL SINGH, GARGI MISHRA, GOVIND MISHRA, RADHA, MADAN SINGH, URMILA SINGH, MALARVIZI, UMA, and PREETI. Each record includes specific error messages, such as 'Given PFMSVendorUniqueCode already exists for another vendor' or 'Unable to cast object of type 'System.DBNull' to type 'System.String''. A 'Showing 161 to 169 of 169 entries' message and pagination controls are visible at the bottom of the table.

Pensioner Name	PPO Number	Unique Identifier	IF-SC Code/ SOL No.	Account No.	Status	Error Description	Action
BRIJPAL SINGH	802018051200267	DOT0001407	PUNB0170900	1709000108012339	Failed	Given PFMSVendorUniqueCode already exists for another vendor	Re Send
GARGI MISHRA	802018109100268	DOT0001416	SBIN0000685	10880429442	Failed	Given PFMSVendorUniqueCode already exists for another vendor	Re Send
GOVIND MISHRA	802018109100268	DOT0001415	SBIN0000685	10880429442	Failed	Given PFMSVendorUniqueCode already exists for another vendor	Re Send
RADHA	802018069100271	DOT0001436	SBIN0017580	30438859133	Failed	Given PFMSVendorUniqueCode already exists for another vendor	Re Send
MADAN SINGH	802018111100276	DOT0001439	PUNB0020000	0200000100220173	Failed	Given PFMSVendorUniqueCode already exists for another vendor	Re Send
URMILA SINGH	802018079100279	DOT0001421	SBIN0004649	37548638833	Failed	Unable to cast object of type 'System.DBNull' to type 'System.String'	Re Send
MALARVIZI	802018111200282	DOT0001510	SBIN0004142	103252814667	Failed	AccountNumber is not valid according to bank account rule(A/c number should between 11 to 17 digit n	Re Send
UMA	802018119100305	DOT0001488	PUNB0051100	511000400004874	Failed	AccountNumber is not valid according to bank account rule(1.Account no is of 16 digit alphanumeric	Re Send
PREETI	802019011100333	DOT0001517	SBIN0000642	10888767687	Pending		No action

Fig (10.5.k)

- After this record will Go to->LC & DLC Verification->LC Verification, Fig (10.5.l).

The screenshot shows the 'LC Verification' page in the CPMS system. The interface includes a sidebar with navigation options like 'Dashboard', 'Action', 'LC & DLC Verification', 'Grievance Management', 'Reports', and 'Audit Trail'. The main content area displays a table with the following columns: Name, Mobile No., PPO Number, Type Of Retirement, Sanction Documents, Documents, and Action. The table lists one record for 'Mrs. PREETI' with a 'Death' type of retirement. The 'Sanction Documents' column lists 'Commutation , PPOFile , GratuityFile , EPPOFile'. The 'Documents' column lists 'LC and DLC', 'Non Employee Certificate', 'FMA Certificate', 'Non Marriage Certificate', and 'Income Certificate', each with a 'Valid Upto' date of 31/01/2020. An action of 'Verify' is available for this record. A 'Showing 1 to 1 of 1 entries (filtered from 80 total entries)' message and pagination controls are visible at the bottom of the table.

Name	Mobile No.	PPO Number	Type Of Retirement	Sanction Documents	Documents	Action												
Mrs. PREETI	2546523652	802019011100333	Death	Commutation , PPOFile , GratuityFile , EPPOFile	<table border="1"> <thead> <tr> <th>Documents</th> <th>Valid Upto</th> </tr> </thead> <tbody> <tr> <td>LC and DLC</td> <td>31/01/2020</td> </tr> <tr> <td>Non Employee Certificate</td> <td>31/01/2020</td> </tr> <tr> <td>FMA Certificate</td> <td>31/01/2020</td> </tr> <tr> <td>Non Marriage Certificate</td> <td>31/01/2020</td> </tr> <tr> <td>Income Certificate</td> <td>31/01/2020</td> </tr> </tbody> </table>	Documents	Valid Upto	LC and DLC	31/01/2020	Non Employee Certificate	31/01/2020	FMA Certificate	31/01/2020	Non Marriage Certificate	31/01/2020	Income Certificate	31/01/2020	Verify
Documents	Valid Upto																	
LC and DLC	31/01/2020																	
Non Employee Certificate	31/01/2020																	
FMA Certificate	31/01/2020																	
Non Marriage Certificate	31/01/2020																	
Income Certificate	31/01/2020																	

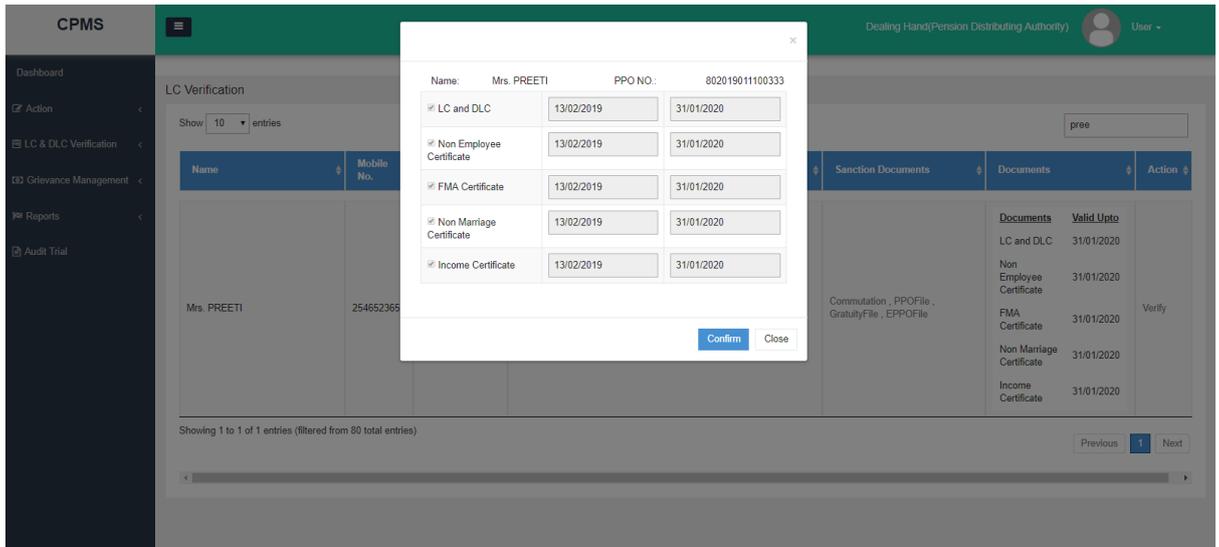


Fig (10.5.l)

- Now Do the LC & DLC and according to the date filled in the revision module, pension shall be payable.
- After this the case will show in Next month (from the month you process the case) Monthly Bill. Fig (10.5.m). An assessment shall be done on account of amount payable , if any, due to delay of intimation of death , from the day following date of death till the the disbursement of 1st revised pension. Such amount shall be paid as arrear/recovery along with 1st revised pension.

Chapter 11

11.Profile Authentication

11.1 Retiree Profile Authentication

In order to ensure that the data filled on retiree profile is correct and has been authenticated by AO Pension (in case of side channel) / HOO user (in case of BSNL), retiree profile upload utility has been developed. On service book verification page (Fig(11.1)) DH user shall view the retiree profile and if satisfied then a printout of retiree profile shall be taken (Fig(11.2)).

The screenshot displays the 'Service Book Verification' interface in the CPMS. The status is set to 'Service Book Not Verified'. A table lists the retiree's details:

S.N.	Name	PAN	Date of Birth	Due Date	Service Verified From Date	Service Verified To Date	Details of Unverified Service(if any)	View	Upload Verification Form(pdf format with max size 1 mb)
1	Mr. KAMAL KISHOR GUPTA	XXXXXX5990	07/05/1958	30/06/2017	07/05/1981	31/05/2018		View	Upload

At the bottom, the 'Date of Service Book Verification' is 09/05/2019, and there is a 'Send For Approval' button.

Fig(11.1)

Preview / Print Forms

Pensioner Name :	Mr. KAMAL KISHOR GUPTA
Type of Retirement :	Superannuation
Height :	180
Father's Name :	RAJENDRA GUPTA
Mother's Name :	RAJBALA DEVI
Date Of Birth :	07/05/1958
Gender :	Male
Aadhaar No. :	344759653658
PAN No. :	AJXPP1599D
Mobile No. :	9638527412
Email Id :	abc1234@gmail.com
Identification Mark 1 :	mole on forehead
Identification Mark 2 :	mole on left wrist

Retiree Other Details

Designation :	AAO	Group :	Group B
Date of Joining :	07/05/1981	Date of Retirement :	31/05/2018
Date of SuperAnnuation :	31/05/2018	Govt. Accommodation provided by Directorate of Estates at any time of service :	No
Pay Commission :	7th Pay Commission		

Close Print

Fig (11.2)

AO Pension (in case of side channel) / HOO user (in case of BSNL) will match the retiree details against physical records and the scanned copy is to be uploaded.

Before signing, the retiree profile details shall be matched against physical records and in case of error necessary corrections be made. The scanned copy shall be uploaded (Fig(11.3)) only after it has been checked as mentioned above.

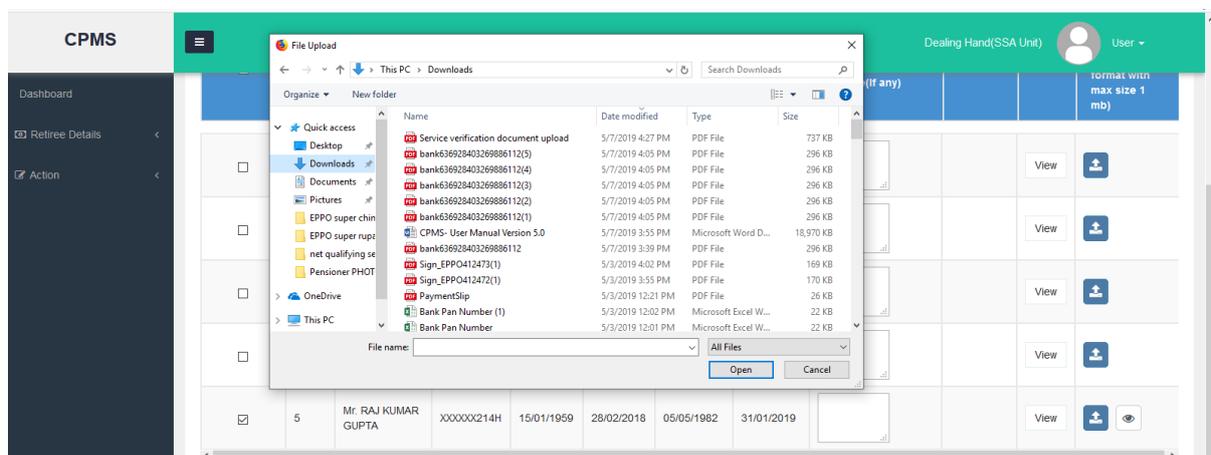


Fig (11.3)

The uploaded verification form can be viewed by clicking eye button (Fig(11.3), Fig(11.4)).

Preview / Print Forms

Pensioner Name :	Mr. KAMAL KISHOR GUPTA	✓
Type of Retirement :	Superannuation	✓
Height :	180	✓
Father's Name :	RAJENDRA GUPTA	✓
Mother's Name :	RAJBALA DEVI	✓
Date Of Birth :	07/05/1958	✓
Gender :	Male	✓
Aadhaar No. :	344759653658	✓
PAN No. :	AJXPP1599D	✓
Mobile No. :	9638527412	✓
Email Id :	abc1234@gmail.com	✓
Identification Mark 1 :	mole on forehead	✓
Identification Mark 2 :	mole on left wrist	✓

Retiree Other Details

Designation :	AAO	✓	Group :	Group B	✓
Date of Joining :	07/05/1981	✓	Date of Retirement :	31/05/2018	
Date of SuperAnnuation :	31/05/2018	✓	Govt. Accommodation provided by Directorate of Estates at any time of service :	No	✓
Pay Commission :	7th Pay Commission	✓			

Fig (11.4)

The form may then be sent to HOO(SSA Unit) for approval (Fig(11.5)).

CPMS

Dealing Hand(SA Unit) User

Dashboard

Retiree Details

Action

Service Book Verification (Action to be Taken 12-15 Months before Date of Retirement)

Status: Service Book Not Verified

Show 10 entries

<input checked="" type="checkbox"/>	S.N.	Name	PAN	Date of Birth	Due Date	Service Verified From Date	Service Verified To Date	Details of Unverified Service(if any)	View	Upload Verification Form(.pdf format with max size 1 mb)
<input checked="" type="checkbox"/>	1	Mr. KAMAL KSHOR GUPTA	XXXXXXXX990	07/05/1958	30/06/2017	07/05/1981	31/05/2018		View	<input type="button" value="Upload"/>

Showing 1 to 1 of 1 entries

Date of Service Book Verification: 09/05/2019

© 2019 -Comprehensive Pension Management System (CPMS)

Fig (11.5)

Chapter 12

12. Upload utility

There are scenarios wherein either orders have been issued in continuation of PPO or corrigendum have been issued. It is important that these orders – being critical in nature- are not just sent to the pensioner but are also uploaded to the pensioners’ dashboard. For this purpose, upload utility has been created.

Some of the scenarios in which upload utility shall be used:

1. Issue of corrigendum of PPO for inclusion of permanently disabled children by PPO.
2. Sanction and payment of arrears of pension in cases where manual calculation has been done

In such cases AO(pension)/AO(PDA) shall upload the documents which shall be visible on the pensioners’ dashboard.

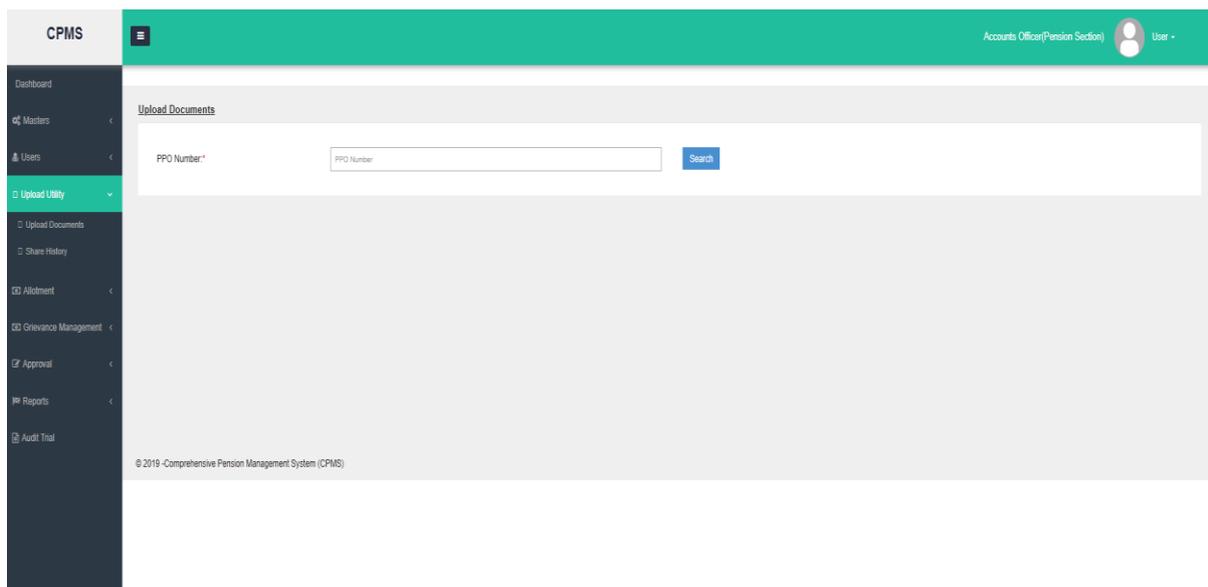


Fig (12.1)

After entering the PPO number and clicking on the “Search” button (Fig(12.1)), the below stated screen will get displayed (Fig(12.2)). The file to be sent to Pensioner’s Dashboard shall be selected and then uploaded. The description of file shall be added (Fig(12.3)). It may be noted that multiple files may be sent to pensioner’s Dashboard. Files can be sent by clicking the Submit button (Fig(12.3)).

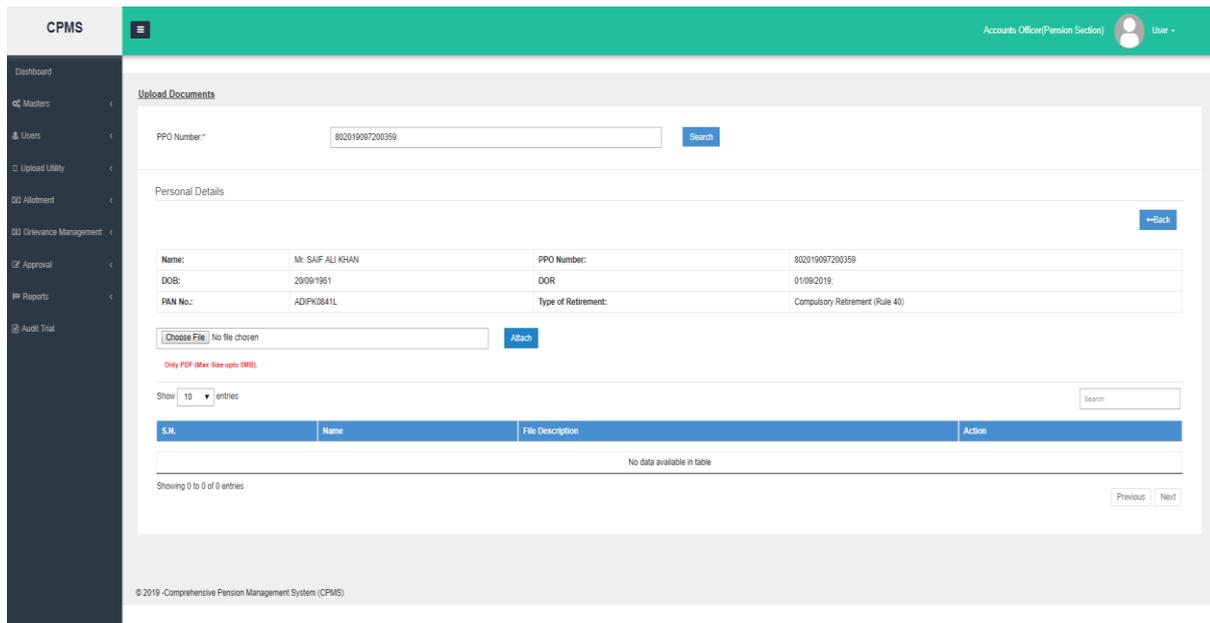


Fig (12.2)

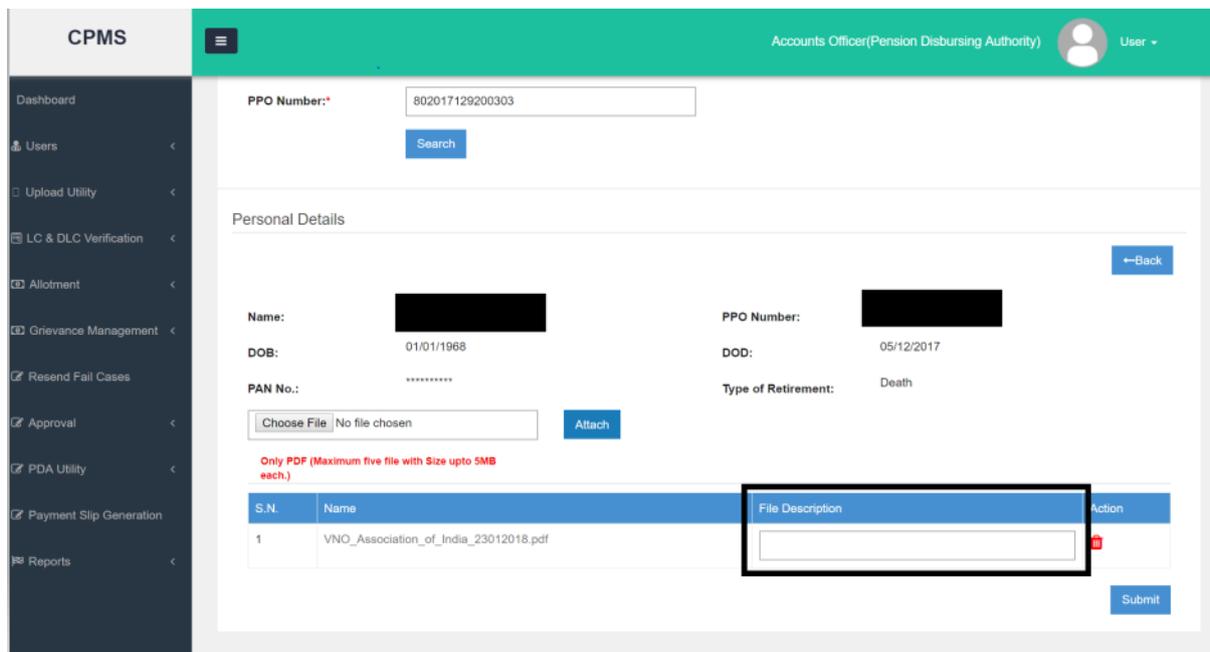


Fig (12.3)

The AO(pension)/AO(PDA) can view the history or date wise records for the information being shared with the pensioner on its dashboard Fig(12.4).

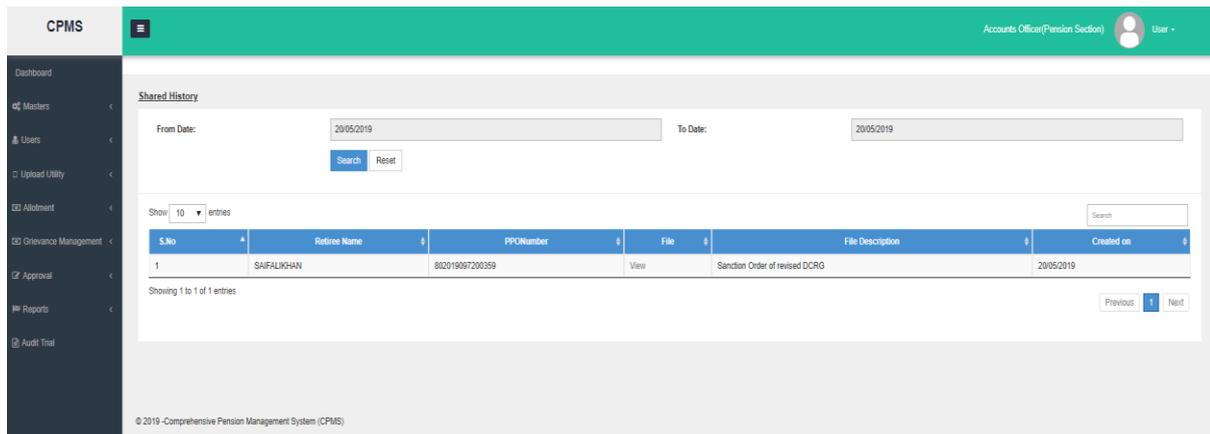


Fig (12.4)

Similarly, the pensioner can also view the information shared by the Department on his/her dashboard by clicking on the tab “Shared Documents” (Fig(12.5), Fig(12.6)).

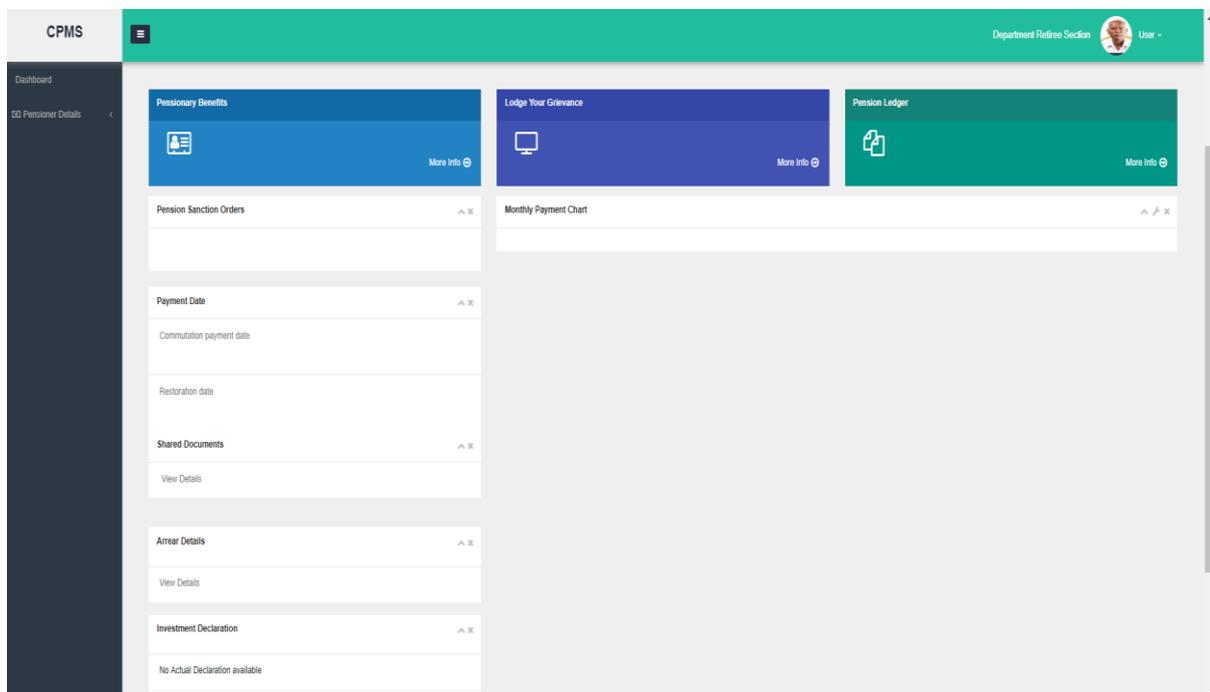


Fig (12.5)

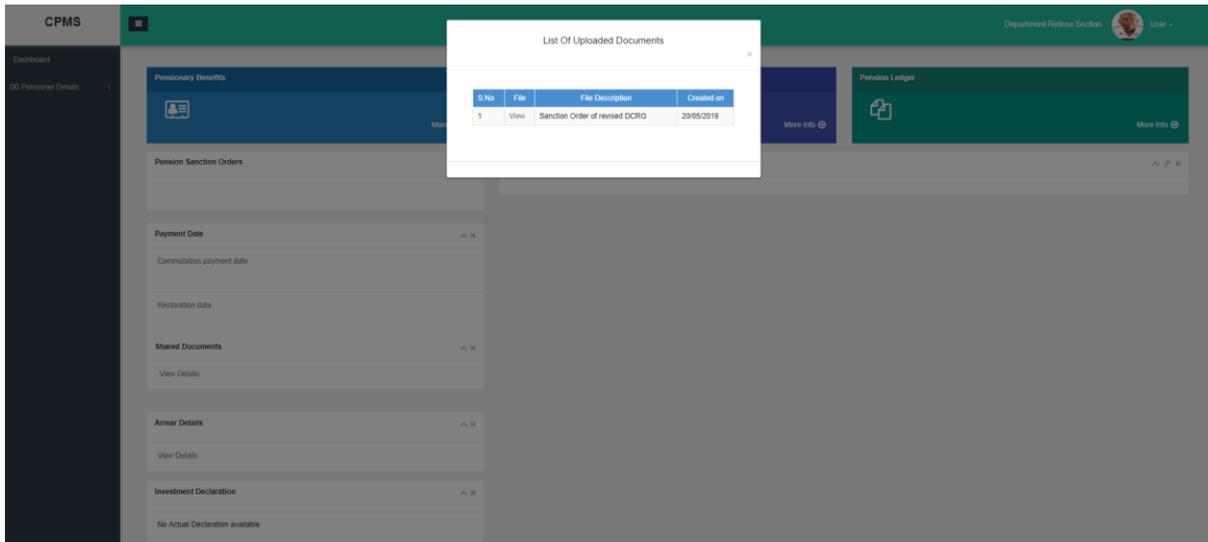


Fig (12.6)

Chapter 13

13. Bill / Payment slip generation

For reconciliation sanction sent from PDA section with the bills appearing on PFMS and to ensure smooth processing, PDF for the bills sent to PFMS for payment can be generated. For bills sent on a day, a pdf can be generated. The date selected for generation of PDF is the date on which DH created the bills.

The option of Bill Type and Status Type is to be selected as per the below stated criteria (Fig(13.1), Fig(13.2), Fig(13.3))according to user needs:-

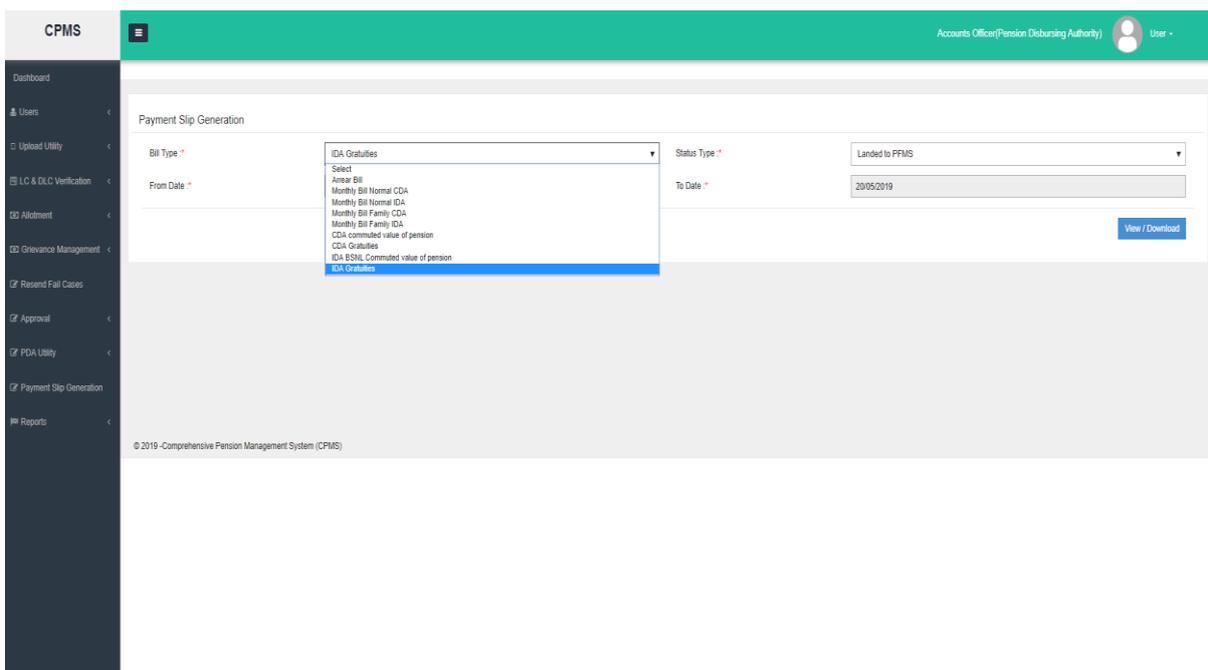


Fig (13.1)

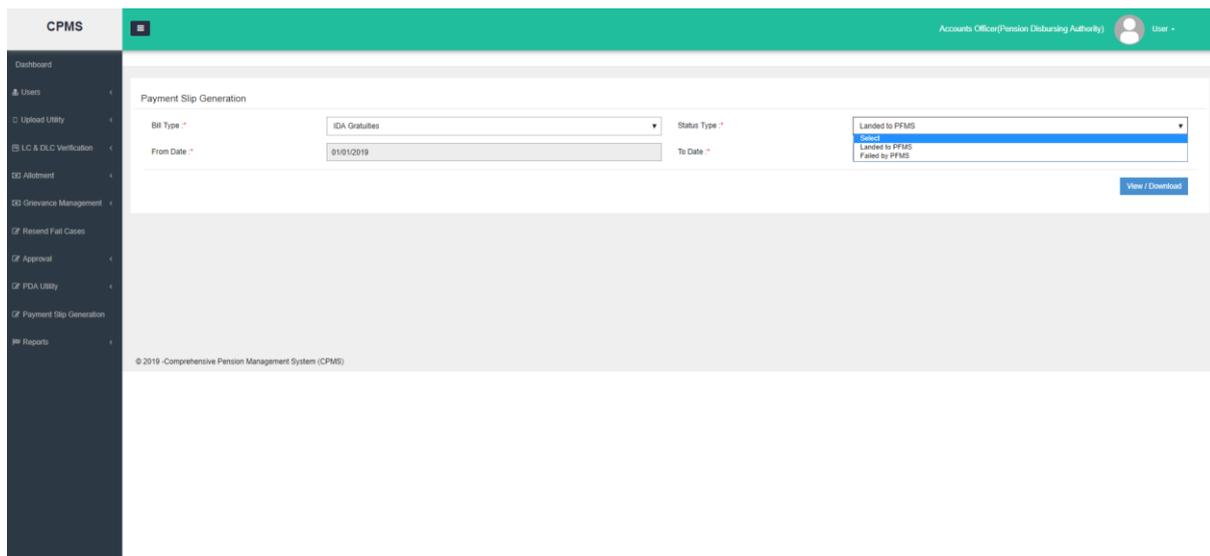


Fig (13.2)

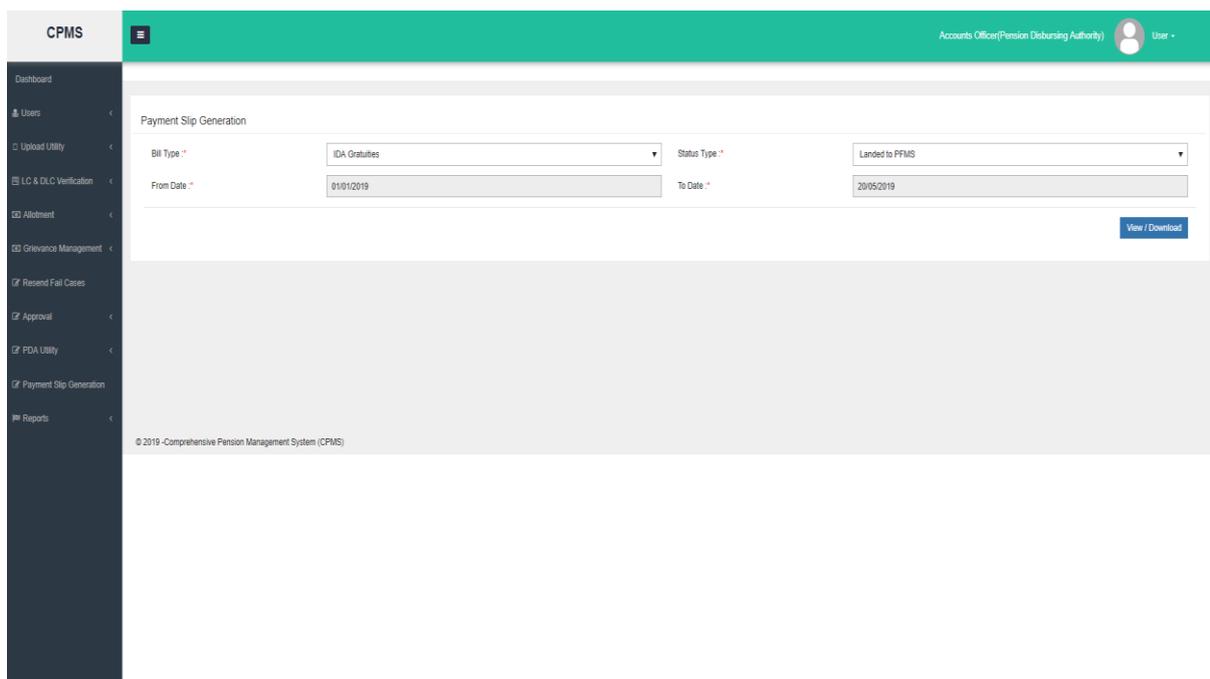


Fig (13.3)

A PDF of the bills generated in the particular time frame will be displayed/downloaded on your desired location which can be sent to cash as sanction. The PDF (Fig(13.4)) can be generated for the files sent on a day and handed over to Cash for DSC.

Sanction of Competent Authority is hereby accorded for the payment of Rs. 36897558 /- (Rupees Three Crore Sixty Eight Lakh Ninety Seven Thousand Five Hundred Fifty Eight Only), details as under :

SL No.	PPO Number	Name of Pensioner	Transaction ID	Sanction No.	Arrear	Gross Amount	I.T.	Cess	Recovery	Withheld	Net Amount
1	802018113200263	Mr. SAURABH SHARMA			0	2000000	0.00	0.00	0	0	2000000
2	802018051200269	Late. AMER SINGH			0	2000000	0.00	0.00	0	0	2000000
3	802019019200274	Late. SHANKARA NAND MISHRA			0	2000000	0.00	0.00	0	0	2000000
4	802018089200270	Late. RAJA RAM			0	2000000	0.00	0.00	0	0	2000000
5	802019019200278	Late. ROHIT SHARMA			0	143280	0.00	0.00	0	349	143280
6	802019019200278	Late. ROHIT SHARMA			0	143280	0.00	0.00	0	349	143280
7	802019019200273	Late. RAJESH KUMAR JHA			0	945408	0.00	0.00	0	50	945408
8	802019114200277	Mr. RAMLAL KUMAWAT			0	2000000	0.00	0.00	0	0	2000000
9	802018126200281	Mr. SHAMBHU			0	1649200	0.00	0.00	0	0	1649200

Fig (13.4)

Chapter 14

14. Updation of Mobile, Email and address

For updating mobile number, Email or Address of a pensioner after finalisation of retirement benefits, following process will be followed.

The user/pensioner will have to first login using the PAN no. as the Username. After login, click on the profile picture and select the option “Edit Profile” (Fig(14.1)).

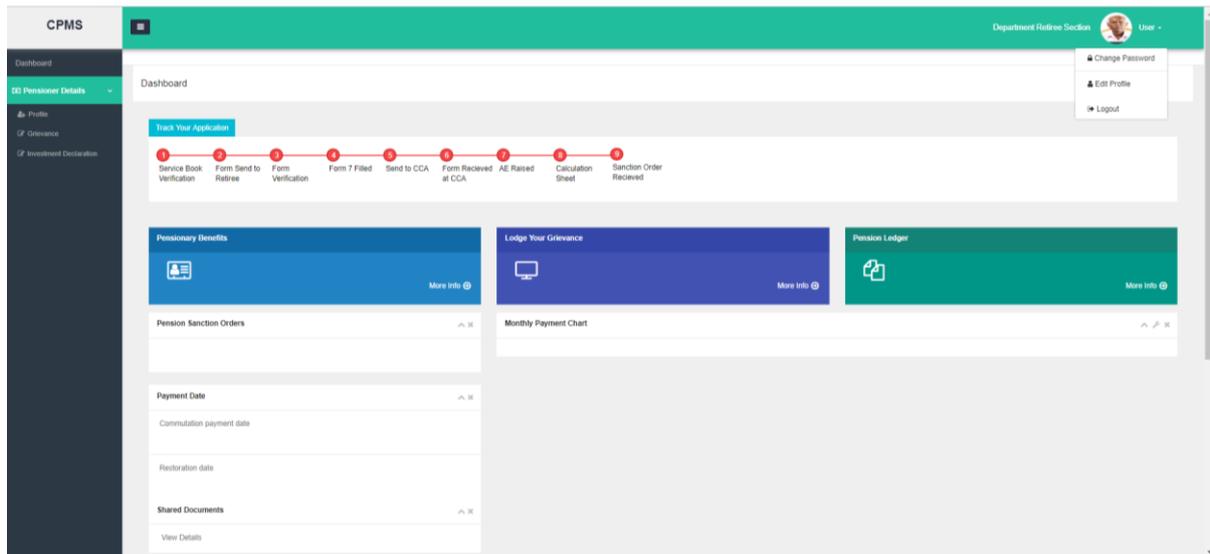


Fig (14.1)

A Pop-up window (Fig(14.2)) will be displayed with the option to choose the following details which the user wants to edit or change: -

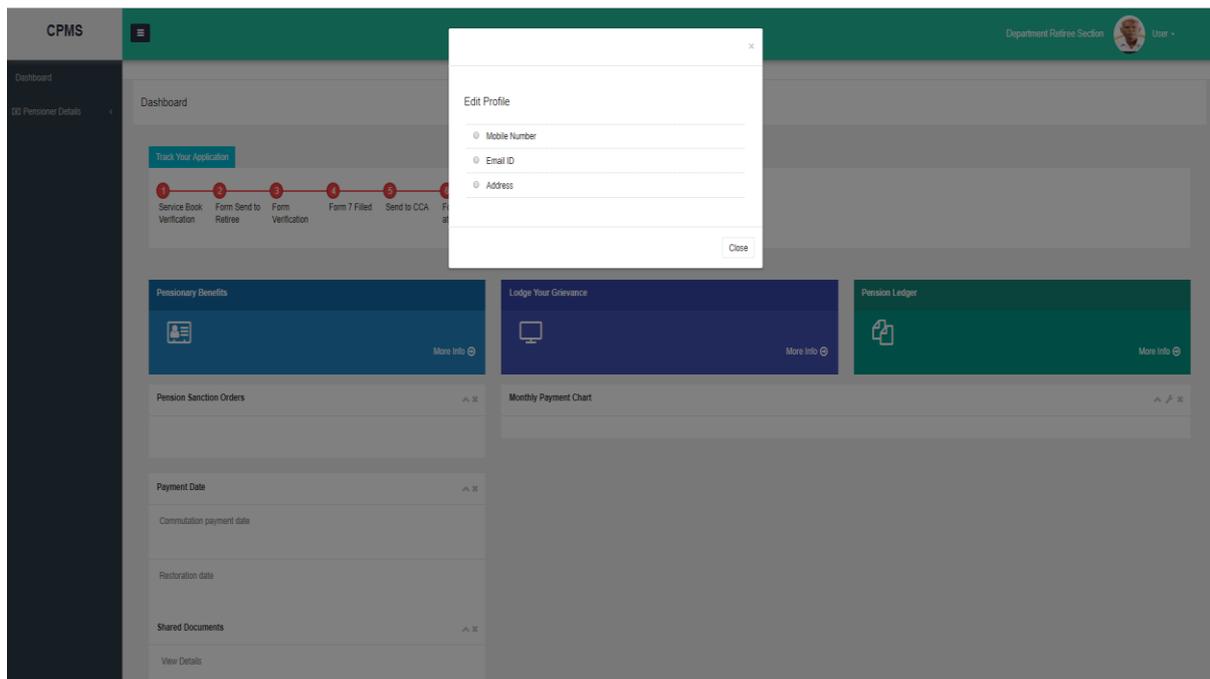


Fig (14.2)

The user has to select the option which he/she wants to change or modify.

14.1 Mobile Number Update

Upon selecting 'Mobile Number', the following screen will be displayed (Fig(14.3))

Fig(14.3)

Retiree can enter his/her mobile number and then select either his/her registered email ID or the entered mobile number to receive an OTP to verify the number (Fig (14.3)). Upon receiving the OTP, retiree should enter the OTP (Fig (14.4)) and save which will then update the mobile number.

Fig (14.4)

14.2 Email ID Update

Upon selecting 'Email ID', the following screen will be displayed (Fig(14.5))

Edit Profile

Mobile Number

Email ID

Address

Enter new Email Id

OTP sent to registered mobile number, new OTP is valid for 10 minutes.

Pensioner's registered Mobile Number: 8077315180

Enter Captcha :

Fig (14.5)

Retiree can enter his/her new email ID and the click on generate OTP which will then send an OTP to the registered mobile number (Fig (14.5)). Retiree should then enter the OTP received and click on save (Fig (14.6)) which would then update the email ID.

Edit Profile

Enter new Email Id

OTP sent to registered mobile number, new OTP is valid for 10 minutes.

Pensioner's registered Mobile Number: 8077315180

Enter OTP :

[Resend OTP](#)

Your OTP is valid for 10 minutes.

Please wait... Do not refresh the page.

Fig (14.6)

14.3 Address Update

To update address, pensioner would be taken to the pensioner grievance page where a grievance related to updation of address can be registered (Fig (14.7)).

CPMS Retiree Section ADBPR2823A User

Dashboard Pensioner Details Pensioner Grievance

Have a Grievance? Send it to us.

Grievance Type :* Updation of address Section : PDA Section

Description :* Upload : Upload a file

*Note: Size of file upload should not exceed 5 MB!! Only .JPEG,.JPG,.PDF file is allowed !!

Submit Clear

Grievance History

Show 10 entries Search

Ticket No	Grievance Type	Department	Description	View File	Grievance Status	Created By	Created Date
2019051670059	Updation of address	PDA Section	ddfdidd	View File	Pending	RISHI KAPOOR	16/05/2019

Showing 1 to 1 of 1 entries Previous 1 Next

Fig (14.7)

Once such a grievance has been registered, it will be assigned to the respective DH who will then update the address. Uploading of proof of address is mandatory in such case. For more details on Grievance Management please refer Chapter 6.

Chapter 15

15. Other pension Types

The pension for VRS/superannuation pension/Pro-rata/compensation pension shall be as per above user manual. However, following changes have to be kept in mind while processing the pension under Compulsory retirement/Invalid pension/Compassionate allowance.

For these three categories of retirement, the application of applicant is eligible for commutation only after medical examination. So, the date on which the medical authority signs the medical report in Part III of Form 4 shall be required to be entered in retiree profile as in Fig 15.1.

Fig (15.1)

Based on the date entered, the commutation will get calculated as per CCS (Commutation of Pension) Rules, 1981 and get displayed in pension papers. This shall be the only change in case of Invalid pension. Additionally, form 7 shall be provided with additional input fields in case of other two retirement types detailed as under.

15.1 Compulsory retirement

In form 7 in case of compulsory retirement, at the time of creating the retiree profile, the Date of Medical Report is to be provided Fig(15.1.1).

Fig (15.1.1)

After processing the case just like for the Normal Pension case, when the user reached at the Form 7 level, careful assessment is required at the time of entering the Percentage (%) at which the pension and DCRG is to be reduced Fig(15.1.2).

Fig (15.1.2)

The impact of which can be seen at the Form 7 which the system calculates automatically (Fig(15.1.3), Fig(15.1.4), Fig(15.1.5)).

CPMS Dealing Hand(SSA List) User

FORM 7
(SEE RULE 58, 60, 61(1)&(2) AND RULE 65(1))
FORM FOR ASSESSING PENSION/FAMILY PENSION AND GRATUITY
(TO BE SENT SIX MONTHS BEFORE THE DATE OF RETIREMENT TO THE PAO)

PART - I

1.	Name of the retiring Government Employee	Mr. AZAD
2.	Father's/Husband's Name	GGG
3.	PAN NO.	XXXXXXXX42E
4.	Height & Marks of Identification	Height : 170 cm & Identification : CUT MARK
5.	Date of Birth	01/01/1961
6.	Service to which he/she belongs(indicate name of Organised service, if any, otherwise say General Central Service)	Central Govt/ BSNL
7.	Particulars of post held at the time of retirement	
	a. Name of the office	gmtd chagra
	b. Post held	ADG
	c. Scale of Pay/Pay Band & Grade pay of the post	6700-206700
	d. Basic Pay/Pay in the pay band & Grade pay	Rs. 80000 -/-
	e. Whether the appointment mentioned above was under Government or outside the Government on foreign service terms	Government
	f. If on foreign service, scale of pay/pay band, pay in the pay band and grade pay of the post in the parent department	N.A.
8.	Whether declared substantive in any Post under the Central Govt.?	No
9.	Date of beginning of service	14/07/1962
10.	Date of ending service	31/01/2019
11.	Cause of ending service	Compulsory Retirement (Rule 40)
12.	In case of compulsory retirement, the orders of the competent authority whether pension may be allowed at full rates or at reduced rates and in case of reduced rates, the percentage at which it is to be allowed (Please See Rule 41)	
	a. Reduced Pension (in percentage of full rate)	50 %
	b. Reduced DCRG (in percentage of full rate)	25 %
13.	In case of removal/dismissal from service whether orders of the competent authority have been obtained for grant of compassionate allowance and if so, at what rate (Please see Rule 41)	N.A.
14.	Particulars relating to military service, if any	N.A.
15.	Particulars relating to the service in autonomous body, if any	No
16.	Whether any Departmental or judicial proceedings in terms of rule 9 of the CCS(Pension) Rules, 1972 are pending against the retiring employee. (If yes, in terms of Rule 60 provisional pension will be admissible and gratuity will be withheld till the conclusion of departmental or judicial proceedings and issue of final orders)	No

Fig (15.1.3)

CPMS Dealing Hand(SSA List) User

b. Emoluments drawn during ten months pending retirement :

Pay Commission	Period From	Period To	Pay in Pay Band - Grade Pay Level	Basic Rate	NPA Rate	Avg Emoluments
7 Pay Commission	01/04/2018	31/01/2019	Level-10 (56100-177500)	80000		80000.00
					Total	800000.00

Note :

If the officer was on foreign service immediately preceding retirement, the notional emoluments which he would have been drawn under Government but for being on foreign service may be mentioned in Items(a) and (b) above (Note 7 below Rule 33)

c. Average emoluments (Rule 34)	A = Rs 80000.00 -/- LFD = Rs. 80000 -/-
d. Emoluments or average emoluments (whichever is higher) to be reckoned for pension (Rule 49)	Rs. 80000 -/-
e. Emoluments reckoned for retirement gratuity/death gratuity (Rule 50)	(80000 + (80000 * 32.00) / 100) = Rs. 105600 -/-
f. Pay reckoned for family pension (Rule 54)	Rs. 80000 -/-
19. Amount of retirement gratuity/death gratuity (Rule 50) (Refer S. No 9 of Calculation Sheet)	((105600 / 4) * 53) * (25 / 100) = Rs. 348800 -/-
20. Details of Govt. dues recoverable out of gratuity	
a. License fee for Govt. accommodation see sub-rules (2),(3) and (4) of rule 2)	Nil
b. Dues referred to in Rule 73	Nil
c. Amount indicated by Directorate of Estates to be withheld under subrule(5) of Rule 72	Nil
21.	
a. Proposed pension/service gratuity (Rule 49)	(50% of Rs. 80000 -/-) * (50 / 100) = Rs. 20000 -/-
b. Proposed dearness relief on pension (as on the date of retirement)	32.00 %
22. Rate of Family pension	
a. Enhanced rate (Rule 54 (3))	Rs. 40000 -/-
b. Twice ordinary rate (80000 * 50%) = Rs. 40000 -/-	
c. Period for which family pension will be payable at enhanced rate	For 7 years from the date of death of pensioner or the date on which the pensioner attains the age of 67 yrs which ever earlier
d. Ordinary rate (Rule 54 (2))	30% OF LFD = Rs. 24000 -/-
e. (80000 * 30%) = 24000 -/-	
f. Date from which ordinary rate of family pension will be payable	After expiry of enhanced rate period
23. Commutation of pension :	
a. Whether simultaneously applied for commutation of pension with the pension application (applicable only in the case of those who retire on superannuation pension)	YES

Fig (15.1.4)

The screenshot displays a form titled 'CPMS' with a sidebar on the left containing 'Dashboard', 'Retiree Details', 'Action', 'Reports', and 'Audit Trail'. The main content area shows a form with the following fields and values:

- 23. Commutation of pension:
 - f. Date from which ordinary rate of family pension will be payable: After expiry of enhanced rate period
 - a. Whether simultaneously applied for commutation of pension with the pension application (applicable only in the case of those who retire on superannuation pension): YES
 - b. The percentage of pension commuted: 40% of 20000 = 8000 /-
 - c. Amount of monthly pension commuted: Rs. 8000 /-
 - d. Commuted value of pension: 8,446 x 8000 x 12 = Rs. 810816 /-
 - e. Amount of residuary pension after deducting commuted portion: 20000 - 8000 = Rs. 12000 /-
 - f. Date from which reduced pension is payable: —
 - g. Date from which commuted pension is to be restored: —
- 24. Post-retirement address of the retiree: —
- 25. e-mail ID, if any: —
- 26. Mobile number, if any: 9668123405

PART - II

- Date of receipt of pension papers by the Accounts Officer from Head of Office: —
- Entitlements admitted:
 - A. Length of qualifying service: 25 YEARS 06 MONTHS 18 DAYS
 - B. Pension -
 - (i) Class of pension: Compulsory Retirement (Rule 40)
 - (ii) Amount of monthly pension: Rs. 20000 /-
 - (iii) Date of commencement: 01/02/2019
 - C. Commutation of Pension -
 - (i) Portion of pension commuted, if any: 20000 x 40% = Rs. 8000 /-
 - (ii) Commuted value of portion of pension commuted, if any: 8000 x 8,446 x 12 = Rs. 810816 /-
 - (iii) Residuary pension after commutation: 20000 - 8000 = Rs. 12000 /-
 - (iv) Date from which reduced pension is payable: —
 - (v) Date of restoration of commuted portion of pension subject to the pensioner continuing to live: —
 - D. Retirement Death Gratuity -
 - (i) Total amount of gratuity: Rs. 349000 /-
 - (ii) Amount to be adjusted towards arrears of licence fee for Government accommodation and licence fee for retention of Govt. accommodation (under retirement (Rule 73) (i) and 73(i)): Nil

Fig (15.1.5)

15.2 Compassionate Allowance

The DH at the time of creating the retiree profile will exercise the option of “Removal/Dismissal from service (Rule 24 and 41)” (Fig(15.2.1)) and the rest of the process flow will continue just like the same we process for the Normal Pension cases. However, at the time of the filling of Form 7, the DH must ensure to enter the correct and verified amount for the field wherein case of removal/dismissal from service whether orders of the competent authority have been obtained for grant of compassionate allowance and if so, at what rate (Please see Rule 41).

The screenshot displays a form titled 'CPMS' with a sidebar on the left containing 'Dashboard', 'Retiree Details', 'Action', 'Reports', and 'Audit Trail'. The main content area shows a form with the following fields and values:

- Particulars of post held at the time of retirement:
 - a. Name of the office: GMTD CHAPARRAH
 - b. Post held: AAO
 - c. Scale of Pay/Pay Band & Grade pay of the post: IDSESA (62000 - 80000)
 - d. Basic Pay/Pay in the pay band & Grade pay: —
 - e. Whether the appointment mentioned above was under Government or outside the Government on foreign service terms? Government
 - f. If on foreign service, scale of pay/pay band, pay in the pay band and grade pay of the post in the parent department: N.A.
- Whether declared substantive in any Post under the Central Govt.? No
- Date of beginning of service: 23/01/1991
- Date of ending service: 21/05/2019
- Cause of ending service: Removal/Dismissal from service (Rule 24 and 41)
- In case of compulsory retirement, the orders of the competent authority whether pension may be allowed at full rates or at reduced rates and in case of reduced rates, the percentage at which it is to be allowed (Please See Rule 41):
 - a. Reduced Pension (in percentage of full rate): N.A.
 - b. Reduced DCRG (in percentage of full rate): N.A.
- In case of removal/dismissal from service whether orders of the competent authority have been obtained for grant of compassionate allowance and if so, at what rate (Please see Rule 41): Enter Amount
- Particulars relating to military service, if any: N.A.
- Particulars relating to the service in autonomous body, if any: No
- Whether any Departmental or judicial proceedings in terms of rule 9 of the CCS(Pension) Rules, 1972 are pending against the retiring employee. If yes, in terms of Rule 69, provisional pension will be admissible and gratuity will be withheld till the conclusion of departmental or departmental or judicial proceedings and issue of final orders: No
- Length of service 23/01/1991 to 21/05/2019: 28 YEARS 4 MONTHS 00 DAYS
 - a. Details of omission, imperfection or deficiencies in the Service Book which have been ignored (under rules 59(1) (b) (ii)): —

Fig (15.2.1)

The impact of which reflects in the Form 7 (Fig(15.2.2), Fig(15.2.3)).

CPMS		Dealing Hand(SSA Unit) User	
PART - I			
1.	Name of the retiring Government Employee	Ms. SARITA	
2.	Father's/Husband's Name	OOVIND	
3.	PAN NO.	XXXXXX543J	
4.	Height & Marks of Identification	Height : 170 cm & Identification : CUT MARK ON HER HAND	
5.	Date of Birth	11/07/1961	
6.	Service to which he/she belongs(indicate name of Organised service, if any; otherwise say General Central Service)	Central Govt/ ESNL	
7.	Particulars of post held at the time of retirement		
	a. Name of the office	OMTD CHAPARRAH	
	b. Post held	A/O	
	c. Scale of Pay/Pay Band & Grade pay of the post	62000 - 80000	
	d. Basic Pay/Pay in the pay band & Grade pay	Rs. 75000/-	
	e. Whether the appointment mentioned above was under Government or outside the Government on foreign service terms	Government	
	f. If on foreign service, scale of pay/pay band, pay in the pay band and grade pay of the post in the parent department	N.A.	
8.	Whether declared substantive in any Post under the Central Govt ?	No	
9.	Date of beginning of service	23/01/1991	
10.	Date of ending service	21/05/2019	
11.	Cause of ending service	Removal/Dismissal from service (Rule 24 and 41)	
12.	In case of compulsory retirement, the orders of the competent authority whether pension may be allowed at full rates or at reduced rates and in case of reduced rates, the percentage at which it is to be allowed (Please See Rule 41)		
	a. Reduced Pension (in percentage of full rate)	N.A.	
	b. Reduced DCRG (in percentage of full rate)	N.A.	
13.	In case of removal/dismissal from service whether orders of the competent authority have been obtained for grant of compassionate allowance and if so, at what rate (Please see Rule 41)	10000	
14.	Particulars relating to military service, if any	N.A.	
15.	Particulars relating to the service in autonomous body, if any	No	

Fig (15.2.2)

CPMS		Dealing Hand(SSA Unit) User	
PART - II			
	f. Pay reckoned for family pension (Rule 54)	Rs. 75000/-	
19.	Amount of retirement gratuity/death gratuity (Rule 55) (Refer to No 9 of Calculation Sheet) 1/4th of 'emoluments' or for each complete six-monthly period of qualifying service subject to maximum of 10 % times the 'emoluments' limited to Rs. 20lakh	(1/55000 / 4) x 57 = Rs. 2351250/- Limited to Rs. 20,00,000/-	
20.	Details of Govt. dues recoverable out of gratuity		
	a. License fee for Govt. accommodation see sub-rules (2),(3) and (4) of rule 2)	Nil	
	b. Dues referred to in Rule 73	Nil	
	c. Amount indicated by Directorate of Estates to be withheld under subrule(5) of Rule 72	Nil	
21.			
	a. Proposed pension/service gratuity (Rule 49)	Rs. 10000/-	
	b. Proposed dearness relief on pension (as on the date of retirement)	120.00 %	
22.	Rate of Family pension		
	a. Enhanced rate (Rule 54 (3))	Rs. 37500/-	
	b. Twice ordinary rate (75000 x 50%) = Rs. 37500/-		
	c. Period for which family pension will be payable at enhanced rate	For 7 years from the date of death of pensioner or the date on which the pensioner attains the age of 67 yrs which ever earlier	
	d. Ordinary rate (Rule 54 (2))	30% OF LPD = Rs. 22500/-	
	e. (75000 x 30%) = 22500/-		
	f. Date from which ordinary rate of family pension will be payable	After expiry of enhanced rate period.	
23.	Commutation of pension :		
	a. Whether simultaneously applied for commutation of pension with the pension application (applicable only in the case of those who retire on superannuation pension)	YES	
	b. The percentage of pension commuted	40% of 10000 = 4000/-	
	c. Amount of monthly pension commuted	Rs. 4000/-	
	d. Commuted value of pension	x 4000 x 12 = Rs. -/-	
	e. Amount of residuary pension after deducting commuted portion	10000 - 4000 = Rs. 6000/-	
	f. Date from which reduced pension is payable	---	
	g. Date from which commuted pension is to be restored	---	
24.	Post-retirement address of the retiree		
25.	e-mail ID, if any		
26.	Mobile number, if any	9868132478	

Fig (15.2.3)

15.3 Miscellaneous issues

In order to account for delayed submission of commutation, on Form 7 has been provided. As per rule 6 of CCS (Commutation of Pension) Rules , 1981, the user will enter the date of receipt of Form 1/Medical Report signing date (In case where form is submitted after the date of retirement) (Fig(15.3.1)). In case where Form for commutation is submitted before date of retirement then commutation shall become absolute on the day following date of retirement.

CPMS [TO BE SENT SIX MONTHS BEFORE THE DATE OF RETIREMENT TO THE PAO]

Dealing Head(SSA Unit) User

PART - I

1.	Name of the retiring Government Employee	Ms. NIDHI
2.	Father's/Husband's Name	NIRANJAN
3.	PAN NO.	XXXXXX561J
4.	Height & Marks of Identification	Height : 152 cm & Identification : burn mark on his hand
5.	Date of Birth	28/08/1985
6.	Service to which he/she belongs(indicate name of Organised service, if any, otherwise say General Central Service)	Central Govt/ BSNL
7.	Particulars of post held at the time of retirement	
a.	Name of the office	noia
b.	Post held	ASTT
c.	Scale of Pay/Pay Band & Grade pay of the post*	Select
d.	Basic Pay/Pay in the pay band & Grade pay	
e.	Whether the appointment mentioned above was under Government or outside the Government on foreign service terms?	Government
f.	If on foreign service, scale of pay/pay band, pay in the pay band and grade pay of the post in the parent department	N.A.
8.	Whether declared substantive in any Post under the Central Govt.?	No
9.	Date of beginning of service	27/02/1994
10.	Date of ending service	06/03/2016
11.	Cause of ending service	Voluntary Retirement on being Declared surplus (Rule 29-A)
	Date of receipt of Form 1 / Medical report signing date: (In case where form is submitted after the date of retirement)	Select Date
12.	In case of compulsory retirement, the orders of the competent authority whether pension may be allowed at full rates or at reduced rates and in case of reduced rates, the percentage at which it is to be allowed (Please See Rule 41)	
a.	Reduced Pension (in percentage of full rate)	N.A.
b.	Reduced DCRG (in percentage of full rate)	N.A.

Fig (15.3.1)

The impact will reflect at the time of processing of Form 7, the factor of commutation will take effect from the Date of submission of Form 1/Medical Report, i.e., In the case where the form is submitted after retirement.

Chapter 16

16. Income Tax Processing

AO PDA will allot the Case to DH PDA. After this, DH PDA will login and process the case further.

Now DH PDA will go to the “**Investment Declaration**”. DH PDA can see the detail of particular record by click on the “View” link shown in the last column of the grid.

Proposed Declaration: Uploading of Supporting documents against savings/investment is not mandatory so the figures will only be checked in r/o ceiling as per IT Act.

Actual Declaration: Uploading of Supporting documents against savings/investment is mandatory so the figures as well as Proof of saving will also be checked.

In case of documents not clear/Documents not as per amount fed, pensioner may be requested to re upload. In such case, the declaration may be admitted as per available document with remarks mentioning that pensioner may upload proper document in respect of rejected column. After receiving of correct supporting document in fresh declaration, based on revised declaration income tax may be processed. should be processed. **Fig(16.1)**

CPMS

Dealing Hand(Pension Distributing Authority) User

Approve Investment Declaration

Show 10 entries

Name	Mobile No.	PAN	PPONumber	Declaration Type	View Declaration
Mr. DHANPAT	9599721127	XXXXXX443S	802017031200036	Proposed Declaration	View
Late SANDEEP SUPERANNUATION THREE	8956321489	XXXXXX321H	802018071200335	Proposed Declaration	View
Mr. SANDEEP WITHHELD NEW	4561237896	XXXXXX242G	802018041100340	Proposed Declaration	View

Showing 1 to 3 of 3 entries

Previous 1 Next

© 2019 -Comprehensive Pension Management System (CPMS)

Fig(16.1)

Once the DHPDA click on the View link, he can see the below screen .Now DHPDA will check all the details filled by Retiree and send it to AAOPDA ,by selecting AAOPDA from the given dropdownlist and click on the Submit button as shown in **Fig(16.2)**

The screenshot shows a confirmation dialog box with the text "Are you sure to save this calculation and send it for approval?" and "OK" and "Cancel" buttons. Below the dialog is a table with the following data:

Description	Amount	Document Status	Value	Remarks
Donation U/S 80G – 50% scheme	0.00	No document uploaded	0.00	
U/S 80CCG- deduction in r/o investment in ESS	0.00	No document uploaded	0.00	
U/S 80GG- deduction in respect of rent	0.00	No document uploaded	0.00	
U/S 80QQB-deduction in respect of royalty income	0.00	No document uploaded	0.00	
U/s 80CCB-deduction in r/o investment in ELSS	0.00	No document uploaded	0.00	
U/S 80 TTA – Interest on deposit in Savings account	0.00	No document uploaded	0.00	
U/S 80 TTB– Interest on deposit senior citizen	0.00	No document uploaded	0.00	
U/S 80U Self Handicap (severe disability and other disability)	0.00	No document uploaded	0.00	

At the bottom, there is a dropdown menu for "Allocation of AAO" with the value "biharpdaao - Rahul singh" and "Submit" and "Cancel" buttons.

Fig(16.2)

Now AAOPDA will login and Process the case further.

After login, AAOPDA will go to the **“Investment Declaration Approval”**. Now AAOPDA can check the detail by click the View link shown in the grid. After crosschecking the detail he can Approve or Return the record by click on the **“Approve”** or **“Return”** button shown in the grid shown in **Fig(16.3)**

The screenshot shows the "Investment Declaration" screen in the CPMS. It features a table with the following data:

Name	Mobile No.	PAN	PPONumber	Declaration Type	View Declaration	Approve	Return
Mr. DHANPAT	9599721127	XXXXXX443S	802917031200036	Proposed Declaration	View	Approve	Return

The page also includes a search bar, pagination controls (Previous, 1, Next), and a footer with the text "© 2019 -Comprehensive Pension Management System (CPMS)".

Fig(16.3)

Now AAOPDA will go to the **IT Calculation Sheet**. From hereon, AAO can see the calculation Sheet by click on the View click shown in the grid **Fig(16.4)**.

Name	PPO Number	Mobile No.	PAN	Date of Birth	Date of Retirement	Retirement Type	Generated Date	Action
Mr. RAMAWTAR YADAV	802018061200159	8126116996	XXXXXX514C	10/06/1958	30/06/2018	Superannuation	21/06/2019	View
Mr. G P CHAUHAN	802019045200374	9768453210	XXXXXX123J	28/08/1959	30/04/2019	Invalid Pension/Invalidation on medical ground (Rule 38)	21/06/2019	View
Mr. SANDEEP SUPERANNUATION EIGHT	802018041100341	5236985632	XXXXXX480E	09/04/1958	30/04/2018	Superannuation	25/06/2019	View
Mr. SAMAY SINGH YADAV	802018096200161	8126116995	XXXXXX935D	10/08/1961	01/09/2018	Voluntary Retirement at the initiative of the Government servant under rule 48, 48-A and FR 56 (k).	28/06/2019	View
Mr. NARENDRA SINGH	802018091200163	8077315107	XXXXXX874D	05/09/1958	30/09/2018	Superannuation	01/07/2019	View
Mr. SANDEEP SUPERANNUATION FOURTEEN	802019011200347	2559632589	XXXXXX729P	16/01/1959	31/01/2019	Superannuation	09/07/2019	View
Mrs. PRITI SHARMA	802019026100293	6757323898	XXXXXX549G	10/08/1966	05/02/2019	Voluntary Retirement at the initiative of the Government servant under rule 48, 48-A and FR 56 (k).	09/07/2019	View
Mr. DHANPAT	802017031200036	9599721127	XXXXXX443S	12/02/1958	23/03/2017	Superannuation	09/07/2019	View

Fig(16.4)

Once AAOPDA click on the View link of “**View**” the below shown page will open **Fig (16.5)**.

Name & Address of the Employer		Name and Designation of the employee	
Department of Telecommunication , Bihar Telecom Circle		Mr. DHANPAT and Telecom District Manager	
PAN/GIR No. of Deductor	TAN No. of Deductor	PAN/GIR No. of Deductee	
		XXXXXX443S	
CIT (TDS)	Assessment Year	Period	
Address:		Form	To
12/23 dhanpat nagar, bhagalpur	2019-20		
City : Bhagalpur	PIN: 813105	20 July 2019	23 Aug 2018
Details of Salary paid and any other income and tax deducted			
1. Gross Salary			
(a) Salary as per provisions contained in section 17(1)	462000.00	Salary BreakUp	
(b) Value of perquisites u/s 17(2) (as per Form No. 12BA, wherever applicable)	0.00		
(c) Profits in lieu of salary u/s 17(3) (as per Form No. 12BA, wherever applicable)	0.00		
(d) Total	462000.00		
(e) Reported total amount of salary received from other employer(s).	100000.00		
2. Less : 2(a) to 2(f) - Allowance exempt u/s 10			

Fig(16.5)

Also AAOPDA can see the “Salary Breakup” from here. (Fig 16.6)

The screenshot shows the CPMS interface with a 'Salary Breakup' modal window open. The background shows a 'Calculation Sheet' for an employee named Mr. DHANPAT, a Telecom District Manager. The modal window displays the following data:

Category	Amount
Gratuity Amount	0.00
Commutional Amount	0.00
Arrear Amount	0.00
Amount of Previous Month	0.00
Amount estimated of coming month	462000.00

The background 'Calculation Sheet' includes fields for Employer Name, PAN/GIR No., CIT (TDS) details, and a table for 'Details of Salary paid and any other income and tax deducted'.

Details of Salary paid and any other income and tax deducted	
1. Gross Salary	
(a) Salary as per provisions contained in section 17(1)	462000.00 Salary BreakUp
(b) Value of perquisites u/s 17(2) (as per Form No. 12BA, wherever applicable)	0.00
(c) Profits in lieu of salary u/s 17(3) (as per Form No. 12BA, wherever applicable)	0.00
(d) Total	462000.00
(e) Reported total amount of salary received from other employer(s).	100000.00
2. Less : 2(a) to 2(f) -Allowance exempt u/s 10	

Fig(16.6)

If no proposed/actual declaration is sent by Pensioner, AAO PDA will run- Auto Calculation. Fig(16.7)

The screenshot shows the CPMS interface with the 'Auto Calculation Sheet' displayed. The interface includes a sidebar with navigation options and a main content area with the following text:

CPMS

Auto Calculation Sheet

© 2019 -Comprehensive Pension Management System (CPMS)

Fig(16.7)

And can see the IT calculation for any pensioner by feeding PPO No. Fig(16.8)

The screenshot displays the CPMS interface for viewing calculation sheets. On the left is a dark sidebar menu with the following items: Dashboard, Users, LC & DLC Verification, Approval, Investment Declaration, Investment Declaration Approval, Auto Calculation, and View Calculation Sheet. The top header is green with the CPMS logo and a user profile for 'Assistant Ac'. The main content area is titled 'View Calculation Sheet' and features a search form for 'PPO Number' with 'Search' and 'Reset' buttons. Below the search form, there is a 'Show 10 entries' dropdown. A table with columns 'Name', 'PPO Number', 'Mobile No.', 'PAN', 'Date of Birth', and 'Date of Retirement' is shown, but it is empty with the message 'No data available in table'. At the bottom, it indicates 'Showing 0 to 0 of 0 entries'.

Fig(16.8)

*****End*****