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सम्पन्न जीवन, निश्चिन्त जीवन

BSNL Voluntary Retirement Scheme 2019
System for Accounting and Management of Pension
(SAMPANN)
COMPREHENSIVE PENSION MANAGEMENT SYSTEM
User Manual

Volume I

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1	1.0	22-11-2019	First version for BSNL employees SSA unit
2	1.1	23-11-2019	2 nd Version – customized for BSNL VRS 2019

Executive Summary

“Sanchar Pension, Seedha Vitaran”

Department of Telecommunications (DoT) launched a Comprehensive Pension Management System (CPMS) with the brand name SAMPANN which brings processing, sanctioning, authorisation and disbursement under a common online platform for the pensioners of the Telecom Department. This platform shall also be used for BSNL Voluntary Retirement Scheme 2019 Pensioners.

To this end, the Head of Office module will be extended to BSNL units like SSAs, Circles Offices and Corporate Office to enable them to initiate the pension cases and ensure smooth and quick functioning.

Table of Contents

Executive Summary.....	2
Table of Contents.....	3
CHAPTER 1.....	4
1.1 Comprehensive Pension Management System (CPMS)	4
1.2 Users	4
1.3 Launching& Logging into CPMS	4
1.4 CPMS Dashboard.....	5
1.5 User Creation &Management.....	6
1.7 Collection &Submission of Pension Papers	7
1.7.1 For BSNL	7
1.7.1.2 DH Creation	7
CHAPTER 2.....	10
2. HoO Unit.....	10
2.1 Normal Pension Case	10
2.1.1 Creation of Retiree Profile	10
2.1.2 Service Book Verification	11
2.1.3 Send Form to Retiree (8M BDR)	12
2.1.4 Form Received (6M BDR)	14
2.1.5 Form Verification (4M BDR)	17
2.1.6 Form 7	19
2.1.7 Form 8	23
2.1.8 Send to PAO	25
2.1.9 View Forms	27

CHAPTER 1

1.1 Comprehensive Pension Management System (CPMS)

CPMS is 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 –

- BSNL field units for BSNL Voluntary Retirement Scheme 2019

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.

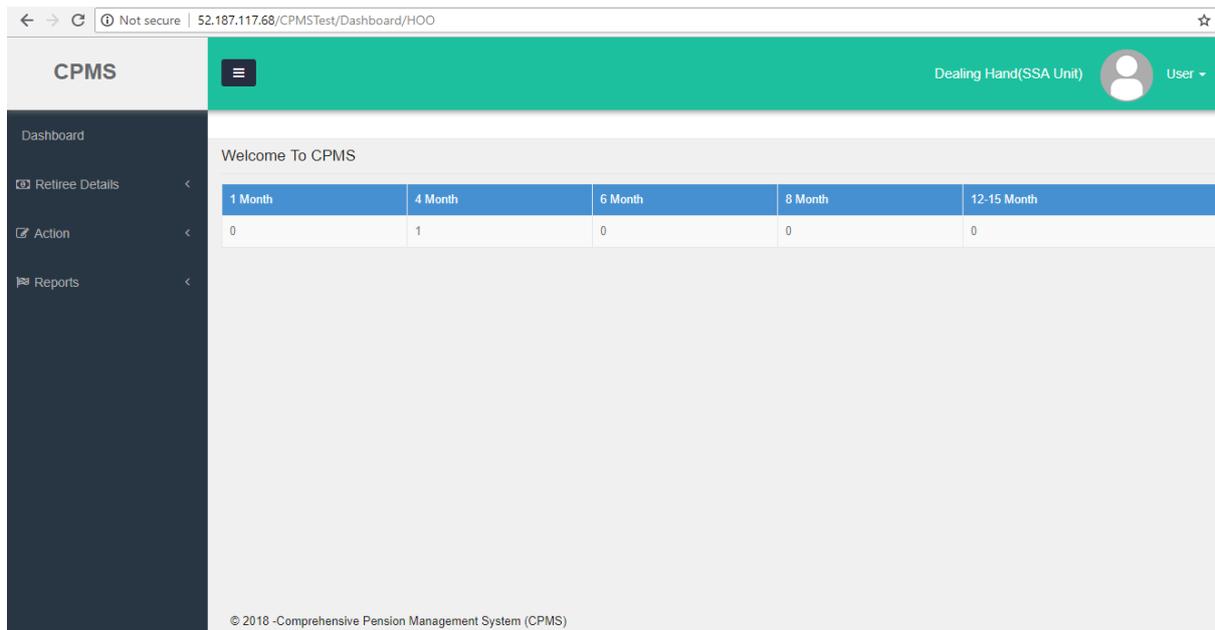


1.4 CPMS Dashboard

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.



CPMS

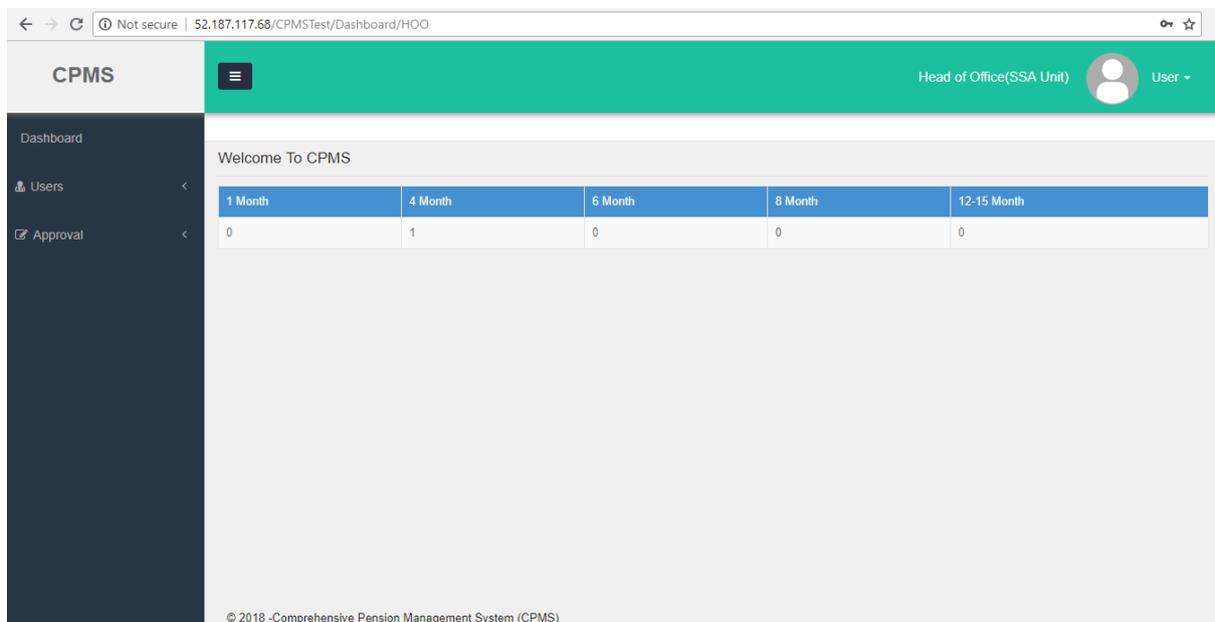
Dealing Hand(SSA Unit) User

Welcome To CPMS

1 Month	4 Month	6 Month	8 Month	12-15 Month
0	1	0	0	0

© 2018 -Comprehensive Pension Management System (CPMS)

Fig 1.0



CPMS

Head of Office(SSA Unit) User

Welcome To CPMS

1 Month	4 Month	6 Month	8 Month	12-15 Month
0	1	0	0	0

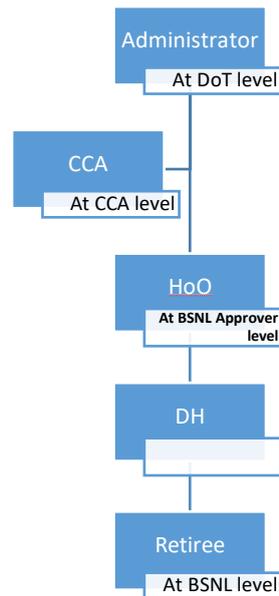
© 2018 -Comprehensive Pension Management System (CPMS)

Fig 1.1

1.5 User Creation & Management

- SAMPANN is based on a hierarchy of users and BSNL users will be a part of this hierarchy
- At the top level is the DoT User as Administrator, then CCA office user at level II and then comes BSNL users. There are two BSNL users: HoO, i.e. Head of Office user and

then DH i.e. Dealing Hand user. In addition, there are retiree users.



User IDs in SAMPANN system from BSNL perspective are created in the following manner:

- For every SSA, Circle and Corporate office, one user shall be created called 'HoO' i.e. Head of office. These offices shall send an offline request to respective CCAs for creation of their users by providing mobile number to CCAs for creation of user.
- CCAs shall create the HoO user and intimate SSA offices about the user credentials. The officials shall login into the system with the user name and password shared and upon logging in, the official shall be required to provide basic details.
Please note that the user should change his/her password immediately after the first login. It should also be noted that there can only be one Head of Office user per SSA or Circle Office or Corporate Office.
- After this, HoO user shall create the DH user i.e. Dealing Hand user. **It may be noted that DH and HoO users shall be as nominated by BSNL.**

1.7 Collection & Submission of Pension Papers

1.7.1 For BSNL

1.7.1.2 DH Creation

- HoO will create the login for DH.
- 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))**
- 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)

The screenshot shows the 'User Registration Details' page in the CPMS application. The page header includes the CPMS logo, a menu icon, and the user's role 'Head of Office(SSA Unit)' with a profile icon. The left sidebar contains navigation options: Dashboard, Users, and Approval. The main content area features a table with the following data:

User Name	Name	Role	Mobile No	Email	Address	Authorization	Edit
ADKFA5694B	tester	Retiree Section	8956231470	tester@gmail.com	this is for testing purpose	Full	Edit
ankit	smt veera k Smt. Veera K Tishikesh Tishikesh	DH(SSA Unit)	9876543210	mrsrishukesh@yahoo.co.in	this is for testing purpose	Full	Edit
arah@gmail.com	dee	HOO(SSA Unit)	1234567890	dee@gmail.com		Full	Edit
chaprath	Saurabh Kumar	DH(SSA Unit)	9896665546	chaprath@gmail.com	Chapra, Bihar	Full	Edit
chaprath1	chaprath dgh	DH(SSA Unit)	7456444456	chaprath12@gmail.com		Full	Edit

Below the table, it indicates 'Showing 1 to 5 of 5 entries' and provides navigation buttons for 'Previous', '1', and 'Next'.

Fig 1.8 (A)

The screenshot shows the 'User Registration: Add/Edit' form in the CPMS application. The page header is identical to Fig 1.8. The left sidebar is also the same. The main content area displays the following form fields:

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

User Registration: Add/Edit

Title: Select Title (dropdown) | First Name: First Name (text input)
 Middle Name: Middle Name (text input) | Last Name: Last Name (text input)
 UserName: UserName (text input) | Role: Select Role (dropdown)
 CCA Name: Bihar Telecom Circle (dropdown) | Mobile No.: Mobile No. (text input)
 Email ID: Email ID (text input)
 Address: Address (text area)

Edit user details Fig 1.9 (A)

The screenshot shows the CPMS interface. The top header is green and contains the text 'CPMS' on the left, a menu icon in the center, and 'Head of Office(SSA Unit)' and 'User' with a profile icon on the right. A dark sidebar on the left lists 'Dashboard', 'Users', and 'Approval'. The main content area is titled 'Menu Rights Userwise' and contains a form with the following elements:

- User Name:** A text input field containing the name 'ankit'.
- Menu List:** A list of menu items, each with a right-pointing triangle and a checkbox:
 - Pensioner Details
 - Action
 - Reports
 - Audit Trial
 - Retiree Details
- Buttons:** Two buttons at the bottom: a blue 'Submit' button and a white 'Cancel' button.

Assign Access Rights Fig 1.9 (i) (A)

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 SSA offices/circle offices/corporate offices.

2.1 Normal Pension Case

2.1.1 Creation of Retiree Profile

- Once Dealing Hand user logs into the system, a list of retirees, will be visible to him along with all details as shown in the Fig 2.1 (a).
- Select Retiree details on the Menu options available on the left pane.
- This data seen has been directly imported from BSNL’s ERP system and is colour coded in Yellow. Since the data is from ERP, it will be non-editable.

The screenshot shows the CPMS interface with a sidebar menu on the left containing 'Dashboard', 'Retiree Details', 'Retiree Profile', and 'Action'. The main content area is titled 'Retiree Details' and features a table of retiree records. The table has columns for Name, Gender, Designation, PAN, Date of Birth, Date of Retirement, Date of Joining, Mobile No, CCAUnit, SSAUnit, and Action. The records are color-coded: green for manual entries and yellow for XML entries. A search bar and a '+ Add New' button are also visible.

Name	Gender	Designation	PAN	Date of Birth	Date of Retirement	Date of Joining	Mobile No	CCAUnit	SSAUnit	Action
Mr. ADASD SADAS ASDASD	Male	AC Mechanic	XXXXXX323E	04/09/2001	05/09/2018	03/09/2015	4345354345	Bihar Telecom Circle	Jorhat TD	Edit
Mr. ANIL GUPTA	Male	Assistant Manager	XXXXXX239H	02/04/1959	30/04/2019	08/04/1992	5765765675	Bihar Telecom Circle	Jorhat TD	Edit
Mr. ASD DAS	Male	ACADO	XXXXXX542J	23/10/1958	31/10/2018	05/11/1995	7002451690	Bihar Telecom Circle	Jorhat TD	Edit
Mr. ASDF	Male	ADG	XXXXXX234X	03/09/1969	30/09/2029	09/03/1989	9955663322	Bihar Telecom Circle	Jorhat TD	Edit
Mr. BHAGAT SINGH SAJWAN	Male	Telecom Technician	XXXXXX164D	10/10/1958	31/10/2018	03/09/1982	7579249924	Bihar Telecom Circle	Jorhat TD	Edit

Fig 2.1(a)

- To view the details, click on the ‘Edit’ button under the Action column.
- Once click on the ‘Edit’ button, a pop up window will open having basic information of the retiree.

IMPORTANT:-It should be ensured that for all BSNL Voluntary Retirement Scheme - 2019 retirees, the Type of Retirement is “BSNL Voluntary Retirement Scheme -2019” and the Date of Retirement is 31/01/2020. If there is any discrepancy, it should be immediately informed to the concerned CCA office. Also, mobile number being entered should be an active number so that alerts can be sent to the retiree.

- At this stage, if the Dealing Hand user feels that the retiree does not belong to his/her circle but another or the retiree details are not correct, he/she should immediately inform the respective circle CCA office.

2.1.2 Service Book Verification

- Now DH should go to the **Action->Normal Pension->Service Book Verification**.
- DH to re-check the form and send it for approval to HoO for service book verification by clicking on “Send for Approval” button. (Fig 2.2)

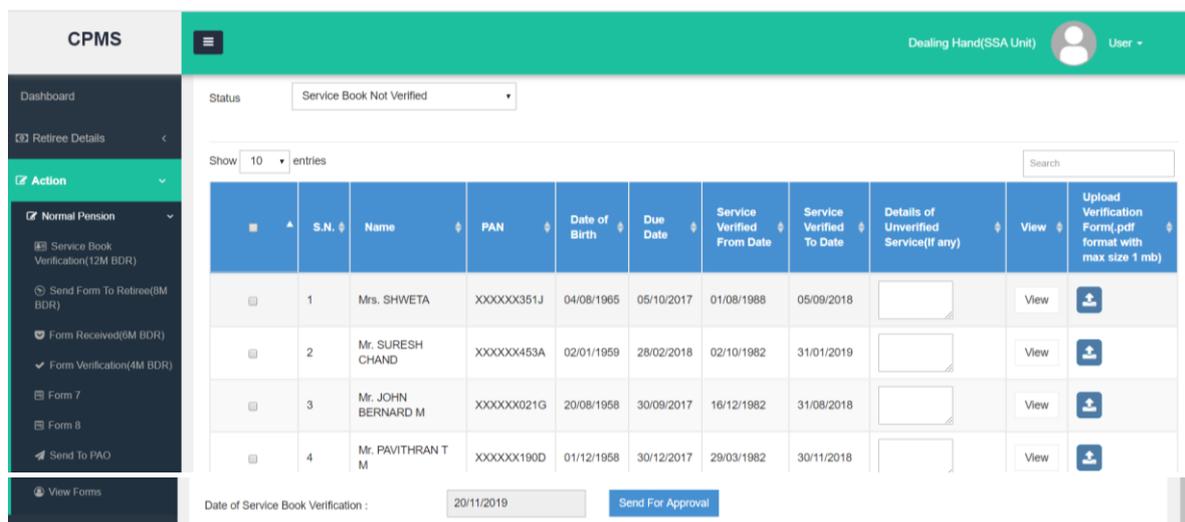


Fig 2.2

- After cases have been sent to the HoO for approval, the HoO will login and go to **Approval → Normal Pension → Service Book Verification** shown in Fig 2.2(a).

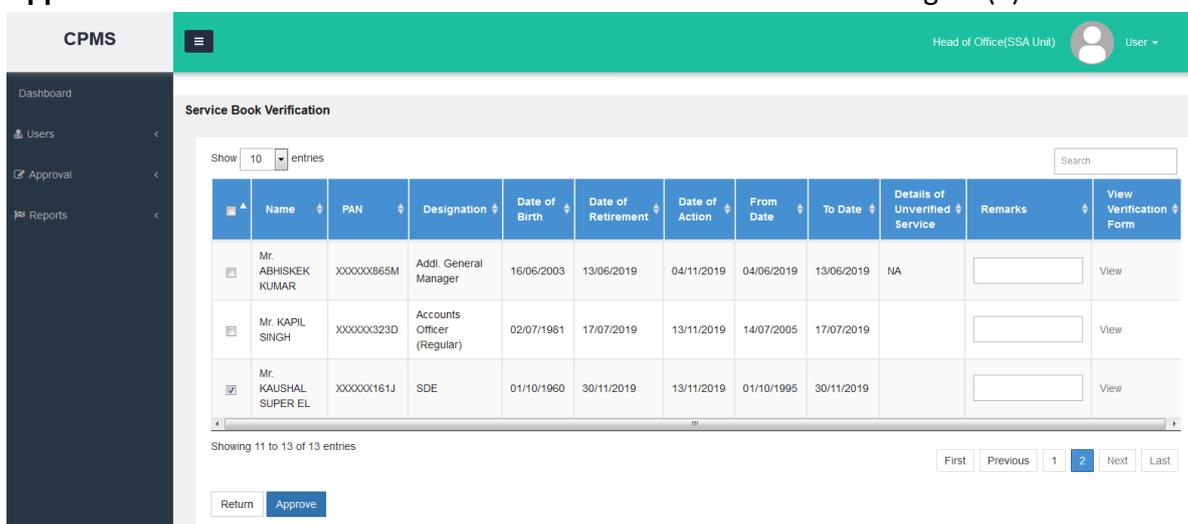


Fig 2.2(a)

- The HoO can either approve the cases or return to DH for correction in unverified period mentioned. If HoO approves the form, the form will appear in 'Send Form to Retiree' tab in DH login.
- Upon return, the HoO has to enter his/her remarks in the remarks column.
- Upon return, case will be visible at DH end under **Action→Normal Pension → Service Book Verification**. To that record select "Return From HoO" in the filter at the top of the page shown in Fig 2.2(b).

S.N.	Name	PAN	Date of Birth	Due Date	Service Verified From Date	Service Verified To Date	Details of Unverified Service(if any)	Remarks	View	Upload Verification Form(pdf format with max size 1 mb)
1	Mr. ASDF	XXXXXXXX34X	03/09/1969	30/10/2028	09/03/1989	30/09/2029			View	Upload
2	Mr. ADASD SADAS ASDASD	XXXXXXXX323E	04/09/2001	05/10/2017	03/09/2015	05/09/2018			View	Upload
3	Mr. ASD DAS	XXXXXXXX542J	23/10/1958	30/11/2017	05/11/1995	31/10/2018			View	Upload
4	Mr. ANIL GUPTA	XXXXXXXX239H	02/04/1959	30/05/2018	08/04/1992	30/04/2019		unapprove	View	Upload
5	Mr. RAM KUMAR	XXXXXXXX956L	01/04/2000	30/04/2059	01/02/2019	31/03/2060		reject	View	Upload

Fig 2.2(b)

- Here DH see the remarks of the HoO, make the necessary corrections and resend the case for HoO's approval.

IMPORTANT:- Before feeding Service Book information and updating, it has to be ensured that the Service Book is actually verified for the period mentioned.

IMPORTANT: Please send the cases for approval in batches by selecting multiple at a time for faster processing and clearing of cases

2.1.3 Send Form to Retiree (8M BDR)

- To process all verified Service Book records, DH go to **Action→Normal Pension → Send Form to Retiree** (Fig 2.3)

S.N.	Name	PAN	Designation	Date of Birth	Date of Retirement	Due Date
1	Mrs. SMT. VEERA K SMT. VEERA K TISHIKESH TISHIKESH	XXXXXX0561J	SDE	30/09/1959	06/03/2016	06/09/2015
2	Mr. RAM SHARMA	XXXXXX0343R	AC Mechanic	03/09/1986	06/09/2018	06/12/2017
3	Mr. RAHUL BANSAL	XXXXXX0450L	ACADO	01/01/1959	31/12/2018	31/03/2018
4	Mr. SHIV KUMAR SINGH	XXXXXX0173N	Technician (Telecom)	01/06/1956	31/05/2018	31/08/2017
5	Mr. KK	XXXXXX0969K	AAO	01/12/1970	10/10/2018	10/01/2018
6	Mr. RAKESH KUMAR	XXXXXX0****	ATI	27/04/1967	17/04/2019	17/07/2018
7	Mr. ABC	XXXXXX0851L	AAO	01/01/1960	31/12/2049	31/03/2049
8	Mr. RAMBHAWAN KUMAR SINGH	XXXXXX0331L	CANTEEN CLERK	09/05/1962	02/05/2019	02/09/2018
9	Mr. LAL KUMAR RAO	XXXXXX0267G	Gestner Operator	18/03/1959	18/04/2019	18/07/2018
10	Ms. SHEETAL SINGHAL	XXXXXX0234F	CA	02/10/1965	01/05/2016	01/08/2015

Fig 2.3

- After checking the details DH send the cases to HoO for approval by clicking on Send For Approval
- After cases have been sent to the HoO for approval, the HoO login and login and go to **Approval** → **Normal Pension** → **Send Form to Retiree** shown in Fig 2.3(a).

Name	PAN	Designation	Date of Birth	Date of Retirement	Date of Action	Email Id	Remarks
KANNAPAN A	AEWPR2201P	AC Mechanic	20/10/1960	05/05/2015	30/08/2018		
TRAVEESH HEGDE	GHJNG4561J	SDE	20/12/1957	31/12/2017	31/08/2018	raveeshgd@yahoo.co.in	
TAMAL	BLCPM3984M	Account Officer (L / A)	01/07/1958	30/06/2018	06/09/2018		
RAM	CAUPS1226Y	Account Officer (L / A)	02/09/1961	03/04/2018	14/09/2018		

Fig 2.3(a)

- The HoO can either approve the cases or return to DH. If approved, the retiree login is created, and his/her credentials are intimated via SMS. The Retiree can login now and fill up his pension related forms
- Upon return, DH go to **Action** → **Normal Pension** → **Send Form to Retiree** and then selecting "Return From HoO" in the filter at the top of the page. See the remarks of

the HoO, make the necessary corrections and resend the case for HoO's approval shown in Fig 2.3(b)

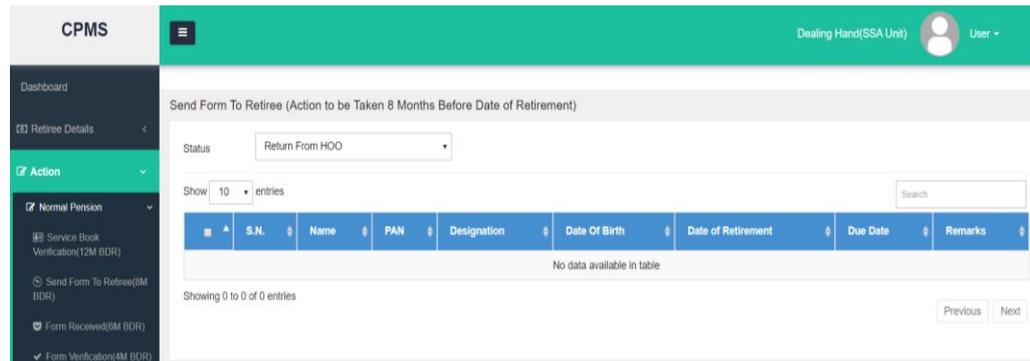


Fig 2.3(b)

IMPORTANT: Please send the cases for approval in batches by selecting multiple at a time for faster processing and clearing of cases

2.1.4 Form Received (6M BDR)

- After the forms have been filled by the retiree, they will be visible to the DH under **Action→Normal Pension→Form Received** (Fig 2.4).

The screenshot shows the CPMS interface with a sidebar menu on the left containing options like 'Dashboard', 'Retiree Details', 'Action', 'Normal Pension', 'Service Book Verification(12M BDR)', 'Send Form To Retiree(8M BDR)', 'Form Received(6M BDR)', 'Form Verification(4M BDR)', 'Form 7', 'Form 8', 'Send To PAO', and 'View Forms'. The main content area is titled 'Form Received (Action to be Taken 6 to 8 Months Before Date of Retirement)'. It features a 'Status' dropdown menu set to 'Cases received with physical copy', a 'Show 10 entries' filter, and a search box. Below this is a table with columns: S.N., Name, PAN, Designation, Date of Birth, Date of Retirement, Date of Action, Due Date, Form Send Date by Retiree, Date of received of form in physical, and Forms.

S.N.	Name	PAN	Designation	Date of Birth	Date of Retirement	Date of Action	Due Date	Form Send Date by Retiree	Date of received of form in physical	Forms
1	Mr. RAHUL SINHA	XXXXXX543T	ADT	08/08/1963	31/08/2007	31/08/2018	28/02/2007	18/08/2018	31/08/2018	Form1 FormA Form5 Form3 Undertaking
2	Mrs. MEERA K	XXXXXX561J	SDE	28/03/1963	06/03/2016	29/08/2018	06/09/2015	29/08/2018	29/08/2018	Form1 FormA Form5 Form3 Undertaking
3	Mr. VIJAYADAS S J	XXXXXX561J	Jt. Chief Engineer	31/05/1971	01/11/2017	04/10/2018	01/05/2017	31/08/2018	04/10/2018	Form1 FormA Form5 Form3 Undertaking
4	Mrs. PALANIAMMAL A	XXXXXX561J	ASSTT. TECH	16/07/1958	31/07/2018	04/10/2018	31/01/2018	31/08/2018	04/10/2018	Form1 FormA Form5 Form3 Undertaking
5	Mr. THAKUR PRASAD MAURYA	XXXXXX561J	DGM	01/08/1958	31/07/2018	15/10/2018	31/01/2018	31/08/2018	15/10/2018	Form1 FormA Form5 Form3 Undertaking

Fig2.4

- Now DH can view the forms by clicking on the forms under the Forms Column shown in Fig (2.4).
- 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.
- If now, any error is detected by DH, then case has to be returned to retiree with remarks. DH click on the Return button under the Return column and mention the error in forms filled shown in Fig 2.4(a).

CPMS

Dealing Hand(SSA Unit) User

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
1	Mrs. SHWETA VRS	XXXXXX890H	AAO	04/08/1965	05/09/2018	05/03/2018	Form1 FormA Form5 Form3 Profile Details Undertaking FMA		
2	Mr. KAUSHAL SUPER EL	XXXXXX161J	SDE	01/10/1960	30/11/2019	30/05/2019	Form1 FormA Form5 Form3 Profile Details Undertaking		

Showing 1 to 2 of 2 entries

Date of receipt of form in Physical : 13/11/2019

Send For Approval

CPMS

Dealing Hand Data Returned Successfully to Retiree !!

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
1	Miss. SHWETA THREE	XXXXXX

Showing 1 to 1 of 1 entries

Date of receipt of form in Physical :

Reason for returning the case.

Please check and correct the marital status of wife.

Correction in Personal Details Correction in Family Details
 Correction in Nomination Form1 Correction in Nomination FormA
 Correction in Bank Details
 Correction in Commutation and FMA
 Correction in Nomination Check List

Confirm Close

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Fig 2.4(a)

- Retiree correct the error and resubmit the forms. Care must be taken to ensure that all details are correct because any errors are detected they can easily be corrected at this stage itself.
- After cases have been sent to the HoO for approval, HoO go to **Approval** → **Normal Pension** → **Form Received** shown in Fig 2.4(c).

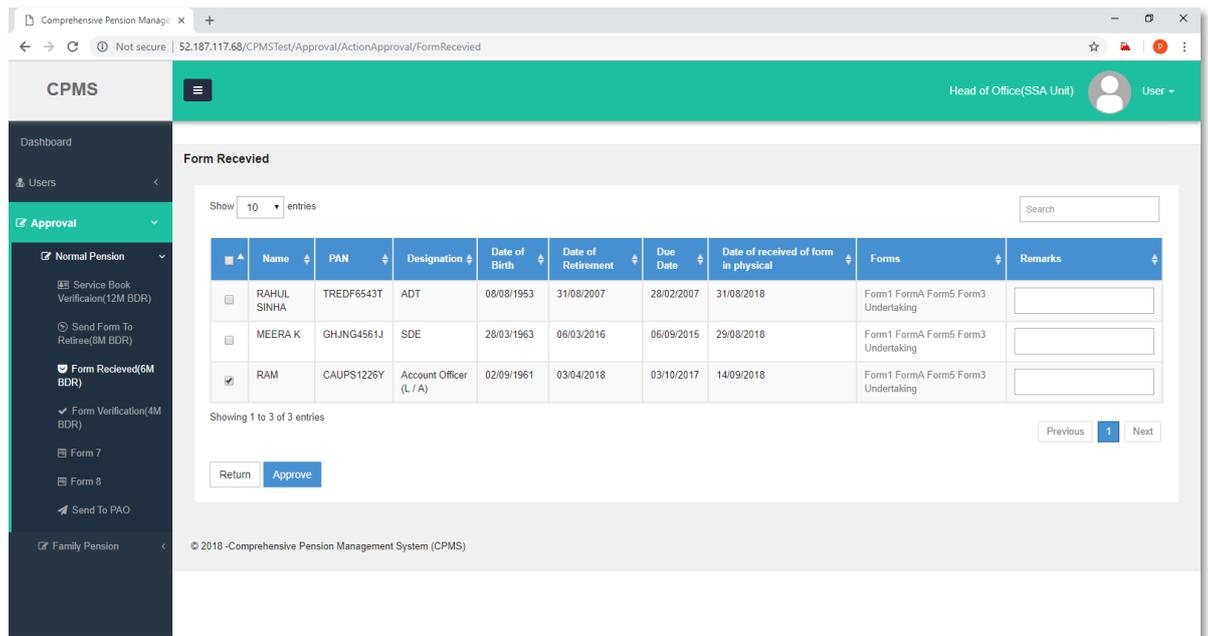


Fig 2.4(c)

- HoO can either approve the cases or return to the DH for correction. Upon approval, the case moves to Form Verification under the DH's login.
- Upon return, the HoO enter remarks in the remarks column and click to Return button.
- Upon return, DH go to **Action**→**Normal Pension** → **Send Form Received** select "Return From HoO" in the filter at the top of the page view the remarks of the HoO, make the necessary corrections and resend the case for HoO's approval shown in Fig 2.4(d)

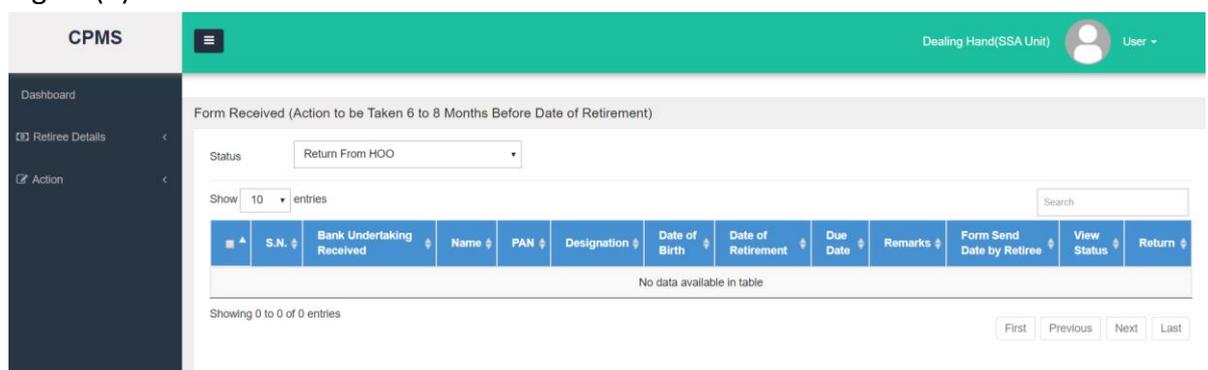


Fig 2.4(d)

IMPORTANT:-

1. Photographs uploaded (Single and Joint) should be of good quality and clear.
2. Signature should legible and visible clearly
3. Address can only have alphanumeric characters and no special characters should be entered. Instead space should be used if needed.
4. Bank Account Details should match the mandate form submitted by the retiree

5. Family member name and Details (DoB/Marital Status) should be verified with Service Book.

IMPORTANT: Please send the cases for approval in batches by selecting multiple at a time for faster processing and clearing of cases

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 go to **Action**→**Normal Pension**→**Form Verification**. (Fig 2.5)
- DH click the icon under View Forms column to view the forms.
- DH can view the images uploaded by the retiree by clicking on the icon under the View Images column.
- If now, any error is detected by DH, then case has to be returned. To return the case click on the Return button under the Return column.
- Retiree correct the error and resubmit the forms.
- After Checking and verifying the form send it for the approval to HoO by clicking on “Verify” Button
- HoO go to **Approval** → **Normal Pension** → **Form Verification** shown in Fig 2.5(a).

The screenshot displays the CPMS Form Verification interface. The main content area shows a table with the following data:

Name	PAN	Date of Birth	Date of Retirement	Due Date	Form Received Date	View Forms	Remarks
BHAGWANT SHAHI	GHJNG4561J	01/10/1957	30/09/2017	30/09/2016	31/08/2018		
RAM	CAUPS1226Y	02/09/1961	03/04/2018	03/04/2017	14/09/2018		

Below the table, there are 'Return' and 'Approve' buttons. The interface also shows a search bar and pagination controls (Previous, 1, Next). The left sidebar contains a navigation menu with 'Form Verification(4M BDR)' selected.

Fig 2.5(a)

- Here, the HoO will be able to see the cases that have been sent by the DH for approval. He/She can view the forms by clicking on the icon under the View Forms

column. The HoO can either approve the cases or return to the DH for correction. Upon return, the HoO has to enter his/her remarks in the remarks column. Upon approval, the case moves to Form 7 under the DH's login. **All forms filled by retiree along with annexures should be countersigned by this stage.**

- 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.

Comprehensive Pension Management System (CPMS) interface showing the 'Verification of Forms' screen. The status is 'Forms Not Verified'. The table displays one entry with the following details:

S.N.	Bank Undertaking	Name	PAN	Date Of Birth	Date of Retirement	Due Date	Form Received Date	View Forms	View Images	Return Back	Verify
1	Bank UnderTaking	RAM	CAUPS1226Y	02/09/1961	03/04/2018	03/12/2017	14/09/2018				Verify

Showing 1 to 1 of 1 entries

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Fig2.7

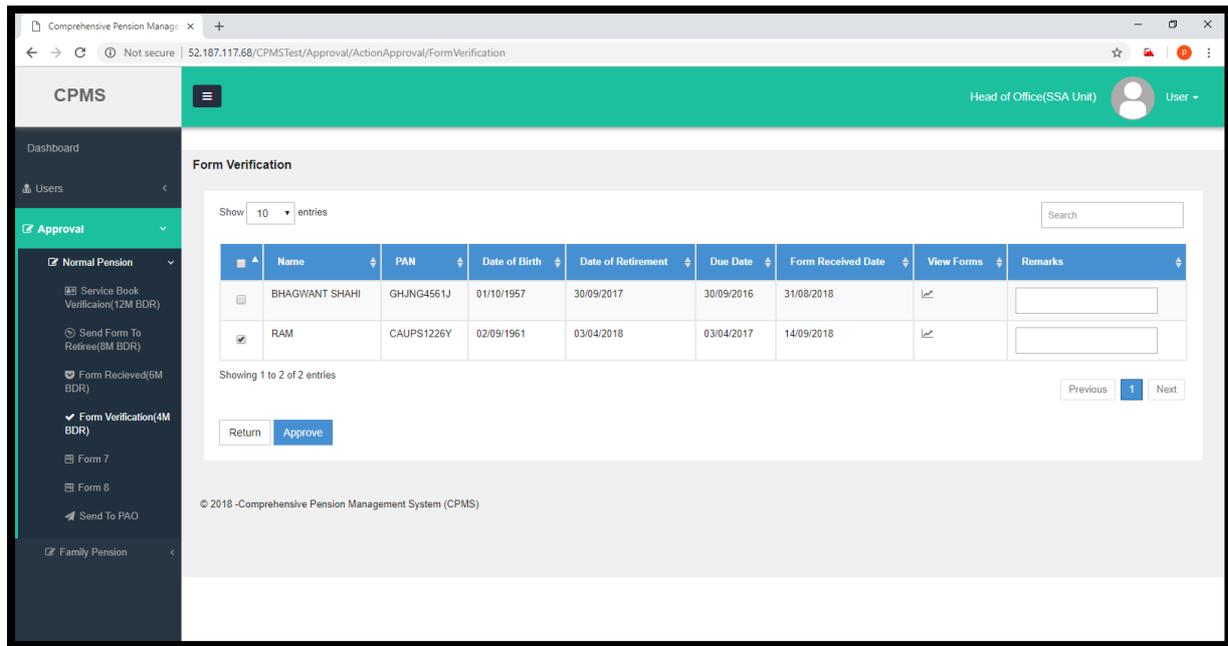


Fig 2.8

IMPORTANT: Please send the cases for approval in batches by selecting multiple at a time for faster processing and clearing of cases

2.1.6 Form 7

- After HoO's approval, the case is fit for Form 7.
- DH go to **Action**→**Normal Pension**→**Form 7**. Click on the icon under Form 7.
- Some information in Form 7 is auto populated. Others have to be entered. (Fig 2.6)
- Once this form is filled and next stage initiated it cannot be edited in HoO

S.N.	Name	PAN	Designation	Date Of Birth	Date Of Retirement	Form 7
1	Mr. RAJ KUMAR	XXXXXX561J	ACCA	01/08/1960	08/08/2018	
2	Mr. BHAGWANT SHAHI	XXXXXX561J	Account Officer (L / A)	01/10/1957	30/09/2017	
3	Mr. VISHWA NATH SINGH	XXXXXX424H	ADG	25/09/1964	11/09/2018	
4	Mr. RAM PRASAD	XXXXXX623P	ACS & GM (Legal)	01/01/1959	31/12/2018	
5	Mr. MAHENDER KUMAR	XXXXXX514F	CANTEEN MANAGER	12/11/1957	30/10/2017	
6	Mr. SACHIN KUMAR	XXXXXX983F	ADG	02/01/1958	31/01/2018	
7	Mr. JAYAWANT WAGHMERE	XXXXXX376N	Technician (Telecom)	14/04/1959	30/04/2019	
8	Mr. AZAD	XXXXXX042B	ADG	01/01/1961	31/01/2019	
9	Mr. SHYAM SUNDER AGGARWAL	XXXXXX968A	Principal General Manager	08/02/1959	28/02/2019	
10	Mr. SACHIN LAMBA	XXXXXX810U	DDG	01/10/1970	31/12/2019	

Fig 2.6

- For BSNL Voluntary Retirement Scheme 2019 Retirement Gratuity and Commutation, shall be deferred and shall be as per BSNL Voluntary Retirement Scheme 2019.
- Certain information in Form 7 is auto populated such as Name and Date of Birth. The DH has to enter other details such as details non-qualifying service shown in Fig 2.6(a).

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

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 2.6(b)

- It should be noted that the fields related to dues will remain disabled.
- Also since retirees cannot apply for commutation at this stage for BSNL Voluntary Retirement Scheme 2019, the lump sum commutation will be zero
- After the verification, DH will click on tab **“Submit and Calculate”** to calculate the pensionary benefits.
- After this the DH will see the calculated Form 7. Then save the generated Form 7 shown in Fig 2.6(c).

CPMS

52.187.117.68 says
Are you sure to save this calculation?
OK Cancel

Dealing Hand(SSA Unit) User

(ii) Amount to be retained for accommodation and licence fee for retention of Govt. accommodation beyond retirement (Rule 72(1) and 72(4)). Nil

(iii) Amount intimated by Directorate of Estates for being withheld on account of unassessed licence fee (Rule 72(5)) Nil

(iv) Amount to be adjusted towards Government dues other than those pertaining to Government Accommodation (Rule 73) Nil

(v) Net amount to be released immediately Rs. 300000/-

E. Family Pension -

(i) At enhanced rate Rs. 5000/-

(ii) Period for which Family Pension at enhanced rate is Payable. From the date following the date of death, for a period of 7 years, or for the period up to 67 years i.e. 01/12/2026, whichever is earlier

(iii) At normal rate Rs. 3000/-

3. Head of Account to which the amount of pension, retirement/death gratuity and family pension are to be debited. -

Save Calculation & Submit

Fig 2.6(c)

- DH click on **save calculation and submit button** and send it to HoO.
- HoO go to **Approval**→**Normal Pension**→**Form 7**.Click on the Current View to see the Form 7 shown in Fig2.6(d).

CPMS

Head of Office(SSA Unit) User

<input type="checkbox"/>	Mr. SURESH WADEKAR	XXXXXXXX099S	ACCA	09/10/1956	01/11/2018	Current View	<input type="text"/>
<input type="checkbox"/>	Mr. OM PURI	XXXXXXXX769H	ADG	03/02/1956	03/03/2018	Current View	<input type="text"/>
<input type="checkbox"/>	Mr. RAM	XXXXXXXX767K	AAO	03/02/1956	08/01/2018	Current View	<input type="text"/>
<input type="checkbox"/>	Mr. LALA RAM	XXXXXXXX717G	Senior Accountant	20/08/1966	15/11/2018	Current View	<input type="text"/>
<input type="checkbox"/>	Mr. PRABHAT SINGH	XXXXXXXX417N	ADG	14/01/1959	31/01/2019	Current View	<input type="text"/>
<input type="checkbox"/>	Mr. ARPITA NAND MISHRA	XXXXXXXX324C	ACCA	03/02/1956	08/01/2018	Current View	<input type="text"/>
<input type="checkbox"/>	Mr. COMPULSORY FIRST APRIL	XXXXXXXX553C	ADET	05/03/1956	08/01/2018	Current View	<input type="text"/>
<input type="checkbox"/>	Mr. VIVEK KUMAR BHASHKAR	XXXXXXXX256C	AAO	14/05/1959	31/05/2019	Current View	<input type="text"/>
<input checked="" type="checkbox"/>	Mr. KAUSHAL SUPER EL	XXXXXXXX161J	SDE	01/10/1960	30/11/2019	Current View	<input type="text"/>
<input type="checkbox"/>	Ms. RR	XXXXXXXX216Y	Account Officer (L / A)	03/02/1956	03/03/2018	Current View	<input type="text"/>

Showing 1 to 10 of 10 entries

Return Approve

First Previous 1 Next Last

Fig2.6(d)

- HoO will Approve/ Return the form. After approval, the case will move to Form 8 at DH's login.
- In case of Return, DH go to **Action**→**Normal Pension** → **Form 7**, select "Return From HoO" in the filter at the top of the page view the remarks of the HoO, make the necessary corrections and resend the Form 7 for HoO's approval shown in Fig2.6(e).

The screenshot shows the CPMS interface for Form 7. The header includes 'CPMS' and 'Dealing Hand(SSA Unit) User'. The left sidebar has a menu with 'Action' selected. The main content area is titled 'FORM 7 (Action to be Taken : 4 to 6 Months Before Date of Retirement)'. It features a 'Status' dropdown set to 'Form Return Back from HOO'. Below is a table with one entry:

S.N.	Name	PAN	Designation	Date Of Birth	Date Of Retirement	View	Remarks	Form7
1	Mr. SANDEEP NET QUALIFYING TEST	XXXXXX201P	AAO	06/01/1959	31/01/2019	View		

Showing 1 to 1 of 1 entries. Navigation buttons: First, Previous, 1, Next, Last.

Fig 2.6(e)

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 concerned CCA.

2.1.7 Form 8

- After HoO's approval, DH go to **Action**→**Normal Pension**→**Form 8**. Some part of information is auto populated in Form 8. The DH will click on the icon under Form 8 column to fill details. **There will be no recoveries made in SAMPANN for retirees under the BSNL VRS Scheme 2019. Therefore, DH should simply click on Save and Send For Approval.** (Fig 2.7).

The screenshot shows the CPMS interface for Form 8. The header includes 'CPMS' and 'Dealing Hand(SSA Unit) User'. The left sidebar has a menu with 'Action' selected. The main content area is titled 'FORM 8 (Action to be Taken : 4 to 6 Months Before Date of Retirement)'. It features a 'Status' dropdown set to 'Form Not Sent to HOO'. Below is a table with one entry:

S.No.	Name	PAN	Designation	Date Of Birth	Date Of Retirement	Form 8
1	Mr. KAUSHAL SUPER EL	XXXXXX161J	SDE	01/10/1960	30/11/2019	

Showing 1 to 1 of 1 entries. Navigation buttons: First, Previous, 1, Next, Last. An 'Edit' button is visible above the 'Form 8' column.

CPMS

Dealing Hand(SSA Unit) User

Dashboard

Retiree Details

Action

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

1. Name : Mr. KAUSHAL SUPER EL

2. Designation : SDE

3. Date of Birth : 01/10/1960

4. Date of Retirement : 30/11/2019

5. Recovery Type : Recovery Amount :

Recovery Type	Amount	Delete
<input type="text" value="Remarks (if any)"/>		

Fig 2.7

- DH click “Save and Send for Approval”.
- The HoO go to **Approval**→**Normal Pension**→**Form 8**. HoO click on Current View to view the form. HoO must ensure that no recoveries are made in the Form 8 generated by the DH.
- HoO either approve/ Return the form.
- If HoO approves the form it will be processed further.
- In case of Return, DH go to **Action**→**Normal Pension** → **Form 8** select “Return From HoO” in the filter at the top of the page, view the remarks of the HoO, make the necessary corrections and resend the Form 8 for HoO’s approval shown in Fig 2.8

CPMS

Head of Office(SSA Unit) User

Dashboard

Users

Approval

Reports

Form 8

Show 10 entries

Search

<input checked="" type="checkbox"/>	Name	PAN	Designation	Date of Birth	Date of Retirement	Current View	Remarks
<input checked="" type="checkbox"/>	Mr. KAUSHAL SUPER EL	XXXXXX161J	SDE	01/10/1960	30/11/2019	Current View	<input type="text"/>

Showing 1 to 1 of 1 entries

Fig 2.8

- 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.

2.1.8 Send to PAO

- After HoO's approval, DH go to **Action**→**Normal Pension**→**Send to PAO**. After viewing, the DH clicks on the icon under Send to PAO column to open the checklist shown in Fig 2.8.

CPMS

Dealing Hand(SSA Unit) User

Dashboard

Retiree Details

Action

Send to PAO (Action to be Taken : 4 to 6 Months Before Date of Retirement)

Status: Form(s) Not Sent to PAO

Show 10 entries

S.N.	Name	PAN	Date of Birth	Date of Retirement	Due Date	Current View	Status	Send To PAO
1	Mr. KAUSHAL SUPER EL	XXXXXX161J	01/10/1960	30/11/2019	30/07/2019	Form7 / Form8		

Showing 1 to 1 of 1 entries

Forward to PAO

First Previous 1 Next Last

Fig 2.8

- DH must see if all the required forms have been submitted. DH select the person eligible for family pension from the list of family members from the dropdown shown in Fig 2.8(a).

CPMS

Dealing Hand(SSA Unit) User

Dashboard

Retiree Details

Action

Form Name

Form 3

Form 5 with all enclosure

Nomination Form 1

Nomination Form A

Bank Undertaking

Form 7

Form 8

Form Name

Retirement Order

LPC

NDC

Eligible for Family Pension (After the sudden death of Pensioner): RITA

Send For Approval

Fig2.8(a)

- DH click on "Send For Approval" and record send for HoO's approval.
- HoO go to **Approval**→**Normal Pension**→**Send to PAO**.
- To View the record, click on the icon under the Approve column.
- HoO ensured that all papers as per checklist are also sent to CCA in physical copy as well shown in Fig 2.8(b).

Fig 2.8(b)

- HoO either click Approve /Return. After approval, the case is sent to the Pension section of the concerned CCA office automatically.
- Upon return DH go to **Action→Normal Pension → Send to PAO** and select “Return From HoO” in the filter at the top of the page, view the remarks of the HoO, make the necessary corrections and resend the case for HoO’s approval shown in Fig2.8(c).

Fig 2.8(c)

IMPORTANT:- 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

- At any point of time, DH and HoO can view the list of all the retirees and their generated forms that are to be sent to CCA office.
- Printout of all the forms and documents must be taken. These have to be sent to the concerned CCA in physical files. Only after the receipt of these forms generated by the system, the CCA offices would be able process the cases further. (Fig 2.9)

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 2.9
