No. 1-95/4/2020-1TD-CGA (E 994)/ 273-313
Ministry of Finance
Department of Expenditure
Controller General of Accounts
PFMS Division (GIFMIS)

Mahalekha Niyantrak Bhawan
GPO Complex, INA, New Delhi
Dated: 15.09.2023

<u>OFFICE MEMORANDUM</u>

Subject: Standard Operating Procedure for online Return process of pension cases from CPAO to PAO - New functionality in Pension module of PFMS jointly developed by CPAO and GIFMIS-PFMS.

The undersigned is directed to refer to the subject cited above and inform that the functionality for online return of pension cases from CPAO to PAO through the Pension module at PFMS has been developed and deployed. Following operating procedure in this regard is issued for guidance of all stakeholders and users.

2. **Current procedure:** Presently, pension case forwarded by Head of Office (HoO) through Bhavishya land in PFMS Pension Module at DH level for checking in "**Pension >>Manage Pensioner**" menu. After passing the pension cases at all levels i.e., DH, AAO and PAO, PAO allots PPO number and digitally sign the e-PPO. Thereafter, PAO verifies digitally signed ePPO and submits it to CPAO online. PAO has to send physical PPO booklet with attachment and PDF of ePPO to CPAO for further processing at CPAO. In the existing scenario, after verification of case at CPAO, CPAO issues e-SSA and forward the same to Bank for payment. In case of any mistake found in e-PPO or physical PPO, CPAO returns pension case back to PAO through offline mode and deletes the pension in their system. PAO has to take corrective action at their end if errors are in PPO Booklet and forward the case back to CPAO and re-upload e-PPO to CPAO in their Login. If any mistake is found in e-PPO, then the case needs to be returned to HoO i.e. Bhavishya and for this purpose DSC needs to be reverted back. Presently, DSC is being reverted at CGA office and for this purpose, a request is required to be forwarded by PAO to CGA office. This process is done offline mode and takes time.

3. To obviate problems and reduce the time period, this office and CPAO have jointly developed an online revert process flow of pension cases from CPAO to PAO and DSC reversion of Pension cases, if required, at PAO office itself. As and when, CPAO returns the pension case back to PAO, the same will now be available in PAO Login in Pension Menu at **Pension =>e-PPO=> e-PPO returned by CPAO.** PAO has to check the reason for return of Pension case and if errors are in physical PPO booklet or errors are in e-PPO or complete case is wrong, PAO has to take action accordingly, i.e., where errors are only in physical booklets, PAO may re-upload e-PPO after rectifying errors in physical booklet and forward the case to CPAO.

4. If there are errors in e-PPO or the complete case itself is not correct, PAO has to take action in initiating DSC reversion available at **Pension =>e-PPO=> e-PPO returned by CPAO.** After initiation by PAO, case will land at DH login for processing

of DSC reversion with all validation. DH will check the case and forward the same to AAO, AAO will verify the case and forward the same to PAO. PAO will revert the DSC and case will be available at PAO login in **Pension =>Utilities=>Return to PAO Login.** After taking action in this menu, PAO will again pass the case from Manage Pension case in pension module and take necessary action for re-DSC or returning case back to HoO for rectification of errors.

5. **Important Instructions before processing of DSC reversion:**

(i) Initiation of re-upload or DSC reversion is to be initiated only after receipt of physical booklets from CPAO and pensioner.

(ii) Revision cases available at any level in DH, AAO or PAO must be reverted back to HoO prior to DSC reversion of pension case.

(iii) Sanctions/bills pending at any level i.e., DDO, DH, AAO or PAO level must be permanently cancelled prior to DSC reversion.

(iv) Payment of sanctions i.e., Gratuity, Commutation, Withheld Gratuity, if done through sanction module, must be entered at DH level with complete details i.e., Bill Number, Bill Date, Voucher Number and Voucher Date.

(v) Recovery of paid amount, if any, must be entered at DH level with complete details i.e., Challan Number, Challan Date, Scroll Number and Scroll Date. Total amount must be recovered and partially recovered amount will not allow DSC reversion at PAO login.

6. A User Manual detailing these processes is enclosed for guidance of all stakeholders and users.

This issue with the approval of Competent Authority

(Anupam Raj)
Dy. Controller of Accounts (GIFMIS)

To,

1. All Pr.CCAs /CCAs /CAs (with independent charge) with a request to kindly circulate these instructions to Pension processing PAOs under their control.
2. Principal PAO, AG, Audit with a request to circulate these instructions to all the pension processing PAOs under your control.
3. Principal PAO, Department of Space with a request to circulate these instructions to all the pension processing PAOs under your control.
4. Principal PAO, Govt of NCT of Delhi with a request to circulate these instructions to all the pension processing PAOs under your control.

Copy to:

1. PPS to CGA
2. Additional CGA (A & FR)
3. CC (Pensions)

Pension Module

User Manual

for

"Return Flow of Pension Case from CPAO"

Contents

Quick Action Menu

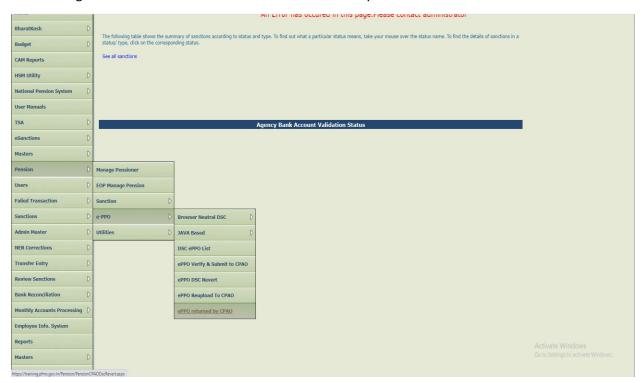| Sr No.	Name of Screen	Menu	Login	Action
1	Return pf Pension Case from CPAO at PAO Login	Menu >> Pension>> ePPO>>PPO (pension case) return by CPAO	PAO	Initiation and forward of pension case to DH
2	Process at DH Login	Menu >> Pension>> ePPO>>PPO (pension case) return by CPAO	DH	Review, data entry and forward the case to AAO with/without remarks
3	Process at AAO Login	Menu >> Pension>> ePPO>>PPO (pension case) return by CPAO	AAO	Review and forward of case to PAO with/ without remarks
4	Process at PAO Login	Menu >> Pension>> ePPO>>PPO (pension cases) return by CPAO	PAO	Review and pass/reject the case

Introduction

Pension case is processed in Pension Module of PFMS portal and forwarded the case to CPAO for processing and onward submission to Bank for payment. However, at the time of processing pension case at CPAO, errors are found in pension case either in physical booklet or ePPO or technical errors, CPAO returns the case back to PAO office along with physical documents. PAO has to take necessary action in rectifying errors in physical booklet and reverting back to CPAO. PAO has to also re-upload ePPO to CPAO website at PAO Login.

If the errors are found in ePPO, DSC needs to be reverted back and after DSC reversion, the case is to be reprocessed at PAO Login or returned back to HoO. Presently, DSC reversion is being done at CGA office. Now, new functionality of online return of pension case from CPAO to PAO has been devised and the same is as under: -
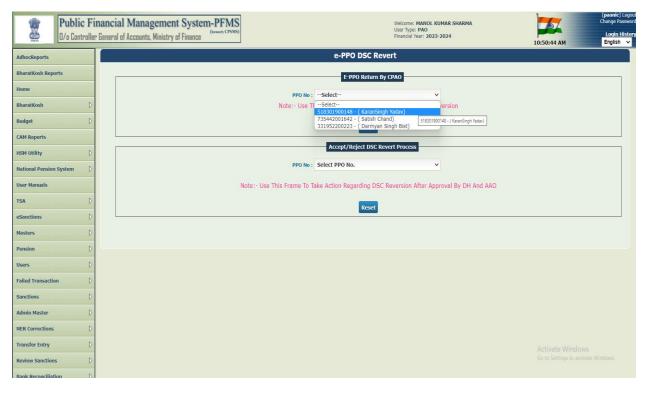
Return of Pension Case from CPAO at PAO Login:

As and when CPAO returns the case back to PAO, they will find PPO number of pension cases in their Login

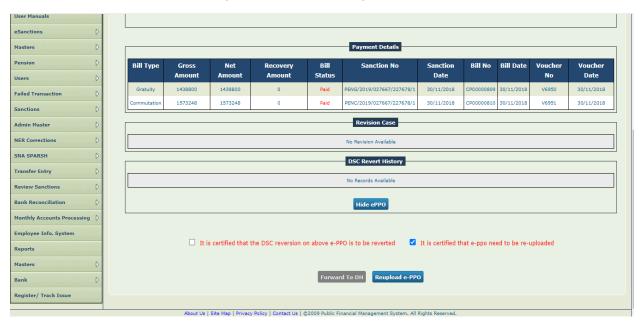- Login>>Menu>>Pension>>ePPO>>ePPO returned by CPAO

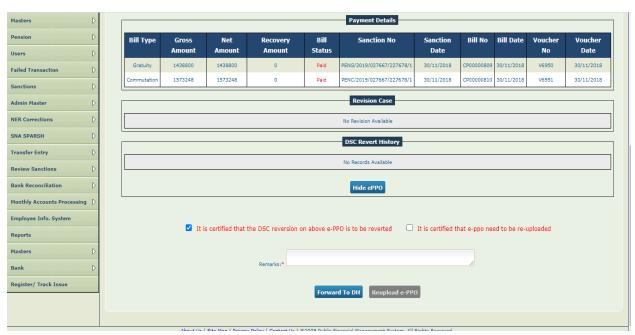- PAO has to select the PPO No. from ePPO returned by CPAO

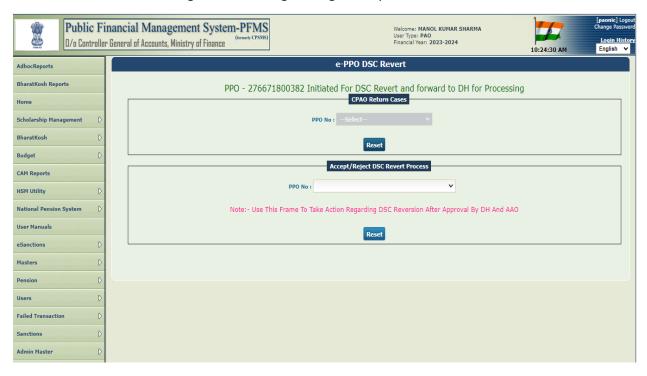- View details of Pensioner and click on View ePPO

- View ePPO details of pensioner and select the checkbox as per return reason remarks i.e. if errors are in physical booklet or ePPO is not visible/damaged at CPAO, the PAO has to select following:

  o It is certified that e-PPO need to be re-uploaded, PAO will be able to reupload the ePPO. Process flow of re-upload of ePPO is already available at this office OM dated 06.06.2023.

- If PAO Selects the button:

  o It is certified that the DSC reversion on above e-PPO is to be reverted, DSC reversion process will be initiated by PAO and PAO will be able to add remarks in the column and forward the case to DH for processing
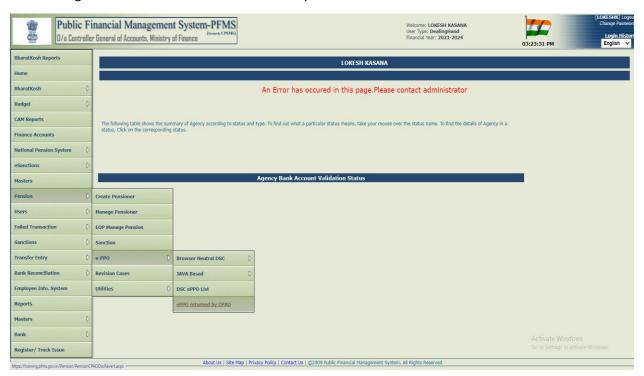
- Thereafter, PAO will get the following message once pension case is forwarded to DH
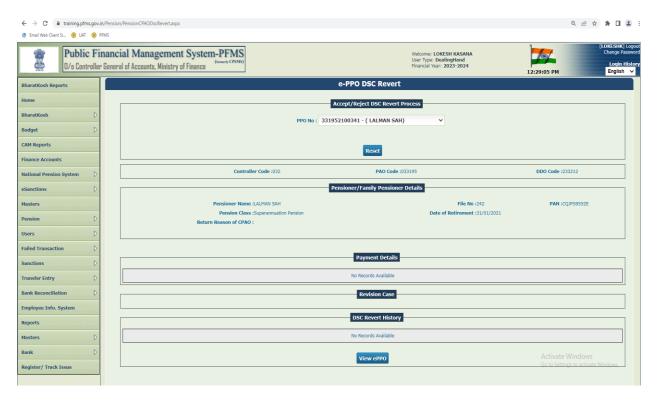
Process at DH Login

- Login>>Menu>>ePPO>>ePPO returned by CPAO
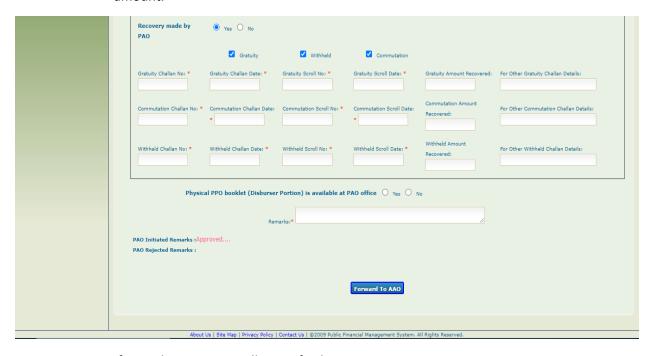

- Select the pensioner from the dropdown list

- View details of user and click on View ePPO

- View ePPO and select the checkbox and move further

Bill Type	Gross Amount	Net Amount	Recovery Amount	Bill Status	Sanction No	Sanction Date	Bill No	Bill Date	Voucher No	Voucher Date
Gratuity	1438800	1438800	0	Paid	PENG/2019/027667/227678/1	30/11/2018	CP00000809	30/11/2018	V6950	30/11/2018
Commutation	1573248	1573248	0	Paid	PENC/2019/027667/227678/1	30/11/2018	CP00000810	30/11/2018	V6951	30/11/2018

- DH will enter the details of the payment if paid through PD/Sanction Module.
- DH will select Yes or NO if it has to enter recovery details
  - Yes, if yes following screen will be available to the DH, DH will select what type of payments are recovered from pensioner. Thereafter, DH will add details of each recovery vide Challan Number, date of Challan Number, Scroll Number and Scroll Date and amount.

  - If DH Selects No, DH will move further.

- DH will have to select
  - Physical PPO booklet (Disburser Portion) is available at PAO office
  - If selected Yes, DH will add remarks and forward the case to AAO.

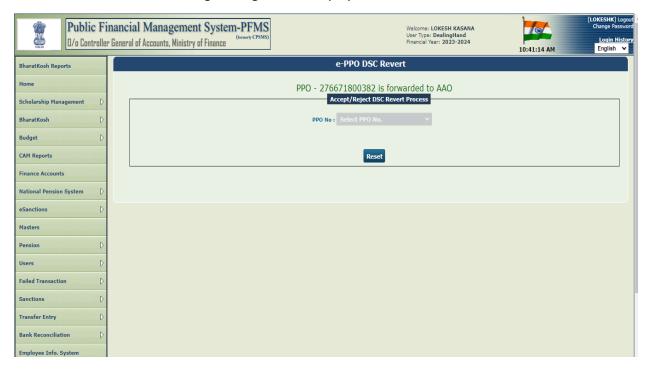 - If selected No, DH will not be able to proceed further

- As and when DH click on forward to AAO, the following confirmation POP up will appear.

training.pfms.gov.in says

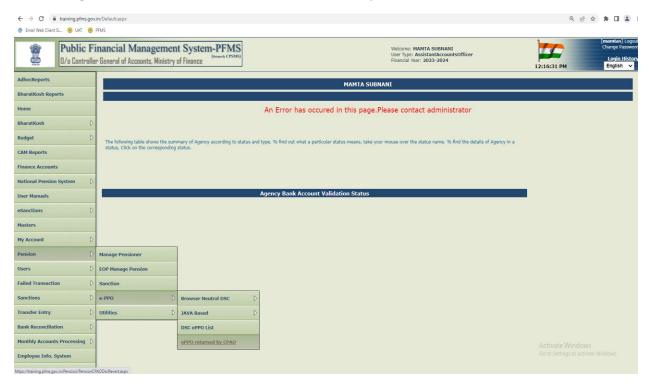Do you want to process the DSC Revert (Without Financial Change)?

OK   Cancel

- Thereafter, the following message will be displayed to DH.

Public Financial Management System-PFMS
(formerly CPSMS)
O/o Controller General of Accounts, Ministry of Finance

Welcome: LOKESH KASANA
User Type: DealingHand
Financial Year: 2023-2024

[LOKESHK] Logout
Change Password
Login History
10:41:14 AM   English ∨

BharatKosh Reports

Home

Scholarship Management

BharatKosh

Budget

CAM Reports

Finance Accounts

National Pension System

eSanctions

Masters

Pension

Users

Failed Transaction

Sanctions

Transfer Entry

Bank Reconciliation

Employee Info. System

e-PPO DSC Revert

PPO - 276671800382 is forwarded to AAO

Accept/Reject DSC Revert Process

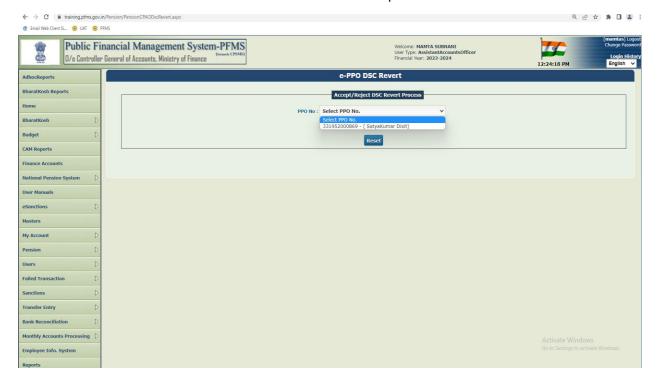PPO No : Select PPO No. ∨

Reset

Process at AAO Login

- Login>>Menu>>Pension>>ePPO>>ePPO returned by CPAO

- AAO User will select Pensioner PPO Number from dropdown

o AAO User will view details of the pensioner and click on View ePPO, select the checkbox to move further

- Once ePPO details are reviewed AAO will add the remarks and forward the case to PAO

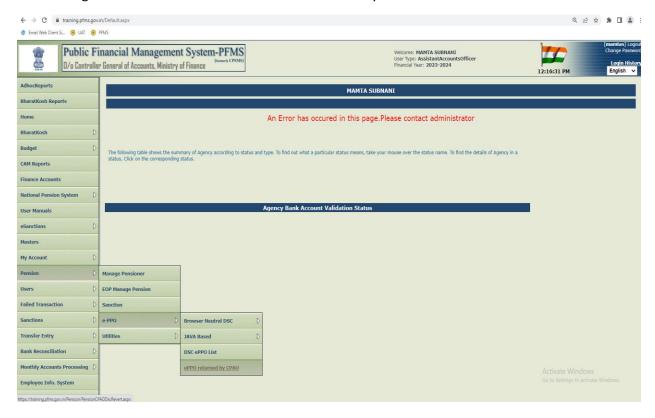- As and when AAO clicks on forward to PAO, the following confirmation POP up will appear.

training.pfms.gov.in says

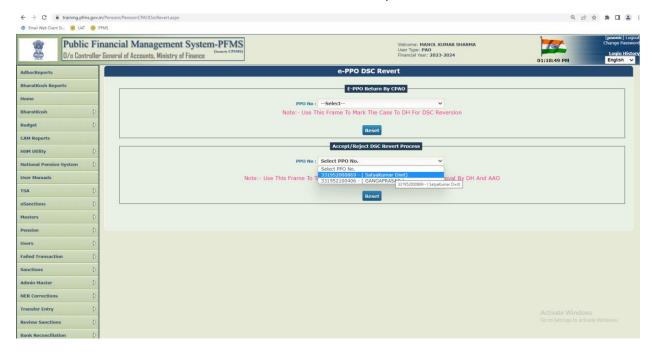Do you want to process the DSC Revert (Without Financial Change)?

OK   Cancel

Process at PAO Login

- Login>>Menu>>Pension>>ePPO>>ePPO returned by CPAO

- PAO User will select Pensioner PPO Number from dropdown

- PAO User Click on View ePPO. PAO User has to view pensioner details, payment details and recovery details, if any and Accept/Reject DSC Revert Process.

- Click on Accept/Reject DSC Revert/Return to DH/Return to PAO Initiation
- If PAO Returns to DH Pension case will be sent again to the DH for edits.
- If PAO Returns to PAO Initiation case will be sent at initiation and PAO will decide as per the case to initiate the DSc revert of the Case for 3 level passing
- If PAO clicks on Accept DSC Revert following action will be taken
  - PAO will be able to find the user at following section
    - Browser Neutral DSC>> Alloc. Gen. of ePPO(win)

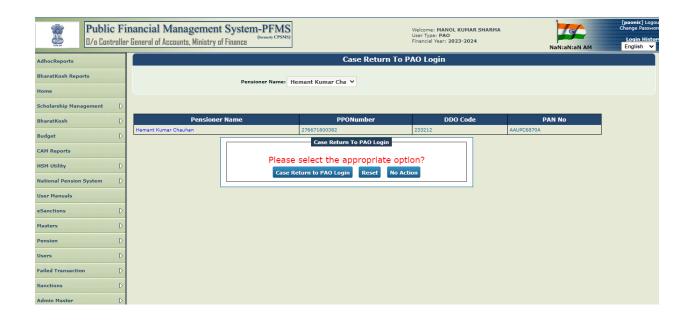- PAO can click on Regenerate ePPO and it will be submitted further

- Utilities>>Return Case at PAO Login

- Select from the dropdown and click on the name.

- PAO can select the action required.

---**** End of Document****---