No. 1-95/4/2020-1TD-CGA (E 2554)/88-91
Government of India
Ministry of Finance Department of Expenditure
Controller General of Accounts
PFMS Division (GIFMIS)

Mahalekha Niyantrak Bhawan
GPO Complex, INA, New Delhi
Dated: 06.06.2023

OFFICE MEMORANDUM

Subject: **Important instructions with regard to new development in Pension Module for PAOs in PFMS Portal.**

The undersigned is directed to refer to the subject cited above and to state that Pension Module under PFMS is being continuously upgraded with new developments and enhancements in the existing functionalities in view of Office Memorandum/Office Order/Gazette Notification etc. issued by Government of India from time to time. The instructions are communicated from time to time and reference is invited to this office OM of even numbers dated 14.01.2020 and 08.12.2021 (copies enclosed) may please be referred to and the same are also available on CGA's website. Copy of circular dated 21.04.2022 for change in grant, recovery head in gratuity recovery head at all login IDs of PAO users in Pension Module is also attached.

2.   To overcome routine issues in Pension Module, following new functionalities have been developed and being deployed live with effect from 06.06.2023: -

I.   New menu of Pension Module
II. JAVA Based DSC (Existing system of PPO allotment and DSC of ePPO)
III. Browser Neutral DSC in Pension Module
     (a) Allotment of PPO number, Generate and regenerate PDF of ePPO
     (b) ePPO DSC (Browser Neutral)
IV. ePPO verification and submission to CPAO
V.   ePPO DSC revert at PAO login
VI. ePPO re-upload at PAO login
VII. Shifting of DDO code within PAO Code in Pension Module – initiation at DH level
VIII. Capturing of two bank accounts details in Nepal Pension case for Nepal citizens where pension is opted from Embassy of India, Nepal (incorporation at Bhavishya level)

3.   Presently, pension cases are being forwarded by Head of Office (HOO) through Bhavishya to PFMS Pension Module which lands 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 has to allot PPO number. This office has now provided facilities for allotment of PPO number in two sub menu options in Pension Module i.e. JAVA based DSC or Browser neutral DSC either of both may be used by PAO in their Login. After implementation of new developments, PAO has to verify and submit the digitally signs ePPO and the same will be available in new sub menu option. **It may please be noted that authorities and sanctions will only be available at PAO login after ePPO is verified and submitted to CPAO.** DSC reversion at PAO login prior to submission to CPAO has also been provided in PAO login, if PAO finds any error in ePPO at the time of verification of ePPO.
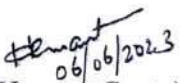
4.   In addition to above, a new sub menu "ePPO reupload" under menu of ePPO has also been provided at PAO login wherein ePPO may be reuploaded to CPAO website by PAO wherein request has been received from CPAO. Further, a new sub menu for shifting of pending sanction of any individual from inactive DDO code to active DDO code within PAO Code has also been provided in all levels i.e. DH, AAO and PAO where initiation is required to be done at DH level and verification at AAO level and approval at PAO Login. After approval at PAO login, PAO has to submit or re-push the pending sanction to new DDO Code.

5.   Bhavishya has provided facility for providing two bank accounts wherein employee/pensioner has opted to draw his/her pension from Embassy of India at Nepal and gratuity and commutation payments are required to be paid in Indian bank account. The same is also available in Pension Module and PAO users have to verify both the bank details available in Bank Details page in Pension. PAO has to submit sanctions for gratuity and commutation to DDO for preparation of bills.

6.   It may please be noted that following types of pension cases may not be processed through Pension Module: -

   a) Arrears of pension required to be paid by PAO/paid by PAO
   b) Provisional Pension/provisional gratuity paid by PAO
   c) Category II pension cases
   d) Dual family pension cases
   e) Family pension cases where spouse in not alive and have eligible son/daughter
   f) NPS superannuation/VRS/compulsory pension cases where pension is required to be paid by fund manager i.e. NSDL
   g) Family pension cases where co-authorization for disabled child is required
   h) EOP/EoFP cases

7.   User Manuals for aforementioned developments are attached for information and strict adherence please.

06/06/2023
(Hemant Gupta)
Asstt. 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.

Copy to:
   1. Sr.AO (GIFMIS) for uploading on website.

No. I-95/4/2020-ITD-CGA (E 2554) 259
Government of India
Ministry of Finance
Department of Expenditure
Controller General of Accounts
PFMS Division (GIFMIS)

Mahalekha Niyantrak Bhawan
GPO Complex, INA, New Delhi
Dated: 07.12.2021

OFFICE MEMORANDUM

Subject: **Important instructions with regard to issues in Pension Module as well as DSC of ePPOs for PAOs.**

The undersigned is directed to refer to the subject above and state that all pension processing PAOs under your control must verify all the contents of e-PPO prior to DSC. It is also intimated that no DSC will be reverted through back end operation by NIC PFMS after 30th December, 2021. It is important to mention that DSC reversion requires back end operations and is being exercised as an extraordinary measure and for interim period till the functionality of return flow of CPAO to PFMS is rolled out. As of now, DSC reversion can be avoided if the ePPOs are verified prior to DSC at any level in the PAO office. The appropriate action to be taken by PAO in such cases is mentioned in Annexure I.

2. In continuation to this office OM No. MF.CGA/ITD-IMS/Pension/Misc./ 2019/107-146 dated 14.01.2020 (copy enclosed) on the subject cited above, the following instructions are hereby communicated:

   a. There is no provision to **EDIT any data in the Pension Module except entry of PRAN Number at DH level.** Every rectification is to be done at source level i.e. at Bhavishya.

   b. After allotment of PPO Number, PAO must press generate e-PPO button so that ePPO is visible to all three levels i.e. DH, AAO and PAO for verification. Images of **photo and signature of pensioner and family pensioner are visible only to PAO**.

   c. DH, AAO and PAO must **verify** all the contents of e-PPO only after taking print out at PAO level before digitally signing. PAO must ensure that full e-PPO is **visible** i.e. with Photograph and signature of pensioner prior to DSC.

   d. Payment of CVP through DDO/Bank is pre-filled field prior to allotment of PPO number and as such, there is no requirement for selection now.

   e. Payment of Gratuity, CVP, Withheld Gratuity and Service Gratuity, if any, must be made on the sanctions which have been submitted and automatically forwarded to DDO through Pension Module by PAO. However, sanctions for Gratuity, CVP, Withheld Gratuity and Service Gratuity, if any, will not be automatically forwarded to DDO in case of

Pensioners who have opted to draw pension from Nepal. PAO users may take a print out of the same from Pension Module, ink-sign, stamp and forward the same to the DDO for preparation of bills through Sanction Module for payment.

f. There is a field available for change in the date of start of 'Reduced Pension Date' prior to allotment of PPO number in Pension Module at PAO Login. PAO may change the start of Reduced Pension Date if superannuation pension is a case processed after date of superannuation has already passed and pensioner has opted for commutation. Further, as DSC has been reverted on the request for change in start of reduced pension date, the PAO may change the date of start of reduced pension date prior to allotment of PPO number and thereafter, generate ePPO for verification at all three levels prior to DSC again.

g. Reference is also invited to Point number 7 of aforesaid OM wherein it was directed to *"verify all the contents of ePPO after taking print at any level with manual case before digitally signing by PAO"* and as per Point number 8 of above OM, it was also desired that *"If there is any problem due to technical issues, the same may be forwarded to pension helpdesk for rectification prior to DSC"*. Despite these above instructions, it has been observed that PAOs are not following the same scrupulously, resulting in return of cases by CPAO to PAO for rectification of errors causing undue delay in finalization of pension cases. Reasons for DSC reversion are also attached herewith (Annexure I) for ready reference.

5. All Pr.CCAs/CCAs/CAs (with independent charge), O/o Pr.PAO, AG Audit and O/o Pr.PAO, D/o Space are requested to please arrange to circulate above instructions/suggestions to all concerned immediately.

6   This issue with the approval of competent authority.

(V. Muthu Kumar)
ACGA (GIFMIS)

To

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

Copy to:

1. The Chief Controller (Pensions), CPAO for information please.
2. The Sr.AO (GIFMIS – Shri KV Hamza) for uploading on website

Examples of reasons for DSC reversion

Sl. No.	Reasons	Action to be taken by PAO users
1	Non-verification of full details of Pensioner/family pensioner and spouse, nominee etc. i.e. name of pensioner/family pensioner mismatch with bank account, incorrect date of birth of employee/spouse, incorrect name of the family pensioner, incorrect date of joining in service of employee, non-availability of Nominee's separate bank details, non-availability of vigilance clearance of employee, wrong date of retirement, Pensioner is not the primary account holder of the bank account, Incorrect bank account number, Error in uploading of the single/joint photograph and signature of the pensioner or joint photo with family or son or daughter uploaded, Due to wrong fixation of pay, Due to the wrong booking of license fee, Non-withholding of DCRG in Bhavishya portal by HOO, Pension case passed without checking for penalty, non-availability of FMA	ePPO must be verified prior to DSC at all three levels
2	Non-availability of paid amount of arrears in e-PPO	Facility not available in Pension Module at present, so please process this case manually
3	Non-availability of provisional pension/ family pension paid in ePPO	
4	Non-availability of date of enhance and normal rate of family pension in e-PPO	System error, ePPO must be verified prior to DSC and any issue may be intimated to pension helpdesk for resolution
5	For correction in date of CVP and start of reduced pension in ePPO	ePPO must be verified prior to DSC and option to change the same is available prior to PPO allotment at PAO Login
6	Non-availability of photograph and signature of pensioner in ePPO	DSC done prior to loading of photographs and signature. Please wait for uploading of photograph and signature.
7	For change in the pension case as Old Pension Scheme from NPS	Data to be verified prior to processing pension case in Pension Module
8	Processing of family pension case where child/children are eligible for family pension and enhanced family pension is to be granted for 10 years whereas child/children age reaches 25 years prior to completion of 10 years of enhanced family pension rates	Facility not available in Pension Module at present, so please process this case manually
9	Non-availability of child/children of first wife and only second wife name available in family pension case in ePPO	
10	Non-availability of co-authorization for disabled child in ePPO	

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Government of India

Ministry of Finance
Department of Expenditure
Controller General of Accounts
IT Division

Mahalekha Niyantrak Bhawan,
GPO Complex, INA, New Delhi–110023
Dated: 14th January, 2020

Office Memorandum

Subject: Important instructions with regard to issues in Pension Module as well as DSC of PPOs for PAOs

Regarding the Pension Module functional on PFMS Portal, it has been observed that most of problems are arising due to non-verification of ePPOs prior to DSC. CGA office has arranged training programmes for all PAOs. Some PAOs however are still facing different types of issues.

In this regard, PAOs must follow instructions as under while handling cases in Pension Module: -

1) Prior to forwarding a request to CGA office for non-availability of Pension case in PAO, status of the case may be verified from the MIS Dashboard or Pension Search Cases both options i.e. PFMS as well as Bhavishya available at the all the levels i.e. DH, AAO and PAO in Pension module on PFMS.

2) Pension cases originally processed through Pension Module will only be available for revision.

3) Revision of pension cases done through COMPACT has to be processed through COMPACT till further instructions.

4) There is no provision to **Edit** any information in Pension Module and every rectification is to be done at source level i.e. at Bhavishya.

5) Calculation sheet in PFMS must be tallied with Bhavishya figures including DA rates at DH level first. If the DA rate of Bhavishya is different than PFMS rates, DH has option to opt for DA rates as per Bhavishya rates. If DH has opted for the same, the DA rate of PFMS will also be the same and calculation of the DA rates must be

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checked. If there is an error, the same may be reported to pension-pfms@gov.in along with screenshot of error. If there is any mismatch between PFMS and Bhavishya Calculation sheet, the same should not be passed at any level.

6) After allotment of PPO Number, PAO must press generate ePPO button, so that, ePPO with photograph and signature is visible to all three levels i.e. DH, AAO and PAO for verification.

7) **Verify** all the contents of ePPO after taking print at any level i.e. DH, AAO or PAO with manual case **before** digitally signing by PAO.

8) If there is any problem due to technical issues, the same may be forwarded to pension-pfms@gov.in for rectification **prior** to DSC.

9) If there is an error in ePPO prior to DSC and which has to be rectified, PAO may return the case to PAO Login from Pension Utilities and return the case to HoO through 'Manage Pension' option for rectification.

10) Payment of CVP through DDO/Bank is an optional field and it must be opted case to case basis at the time of allotment of PPO Number.

11) After DSC of ePPO, PAO must press Submit button for forwarding of Sanction of Gratuity, Service Gratuity, Withheld Gratuity and CVP (if any), so that, the same may be visible to DDO for preparation of bill.

12) After DSC, PDF of ePPO must be forwarded to CPAO with PPO booklet and other documents.

13) Payment of Gratuity, CVP, Withheld Gratuity and Service Gratuity must be made on the sanction which has been submitted and automatically forwarded to DDO through Pension Module by PAO.

14) If the payment of Gratuity, CVP, Withheld Gratuity and Service Gratuity has been paid through Sanction Module of PFMS instead of Pension Module then existing sanction pending at PFMS must be cancelled after due verification of payment from DDO. In these cases, reports related to payment in Pension Module will remain incomplete forever.

15) If DSC has been reverted on the request of PAO for change of payment option of CVP, the PAO may check the case in Utilities – Commutation details and change the payment option. Thereafter, they may generate ePPO for verification at all three levels prior to DSC of pension case again.

432/2026)ITDIICGA revision payments are at present payable by Bank. The PAO has to ink sign and forward the same to CPAO. Authority for the same is available in CAM Reports – Pension – Pension Authority Details – Revision – View Report.

17) CPAO has stopped allotment of PPO Number through their website for fresh Pension cases where Pension Module has been activated on PFMS portal. For other type of pension cases, PAOs may approach CPAO.

18) Provision to process NPS family pension/invalid pension is now available in Pension Module.

(Anupam Raj)
Asstt. Controller General of Accounts

To

All Pr. CCAs/CCAs/CAs (with independent charge) with a request to kindly circulate these instructions to Pension processing PAOs under their control

Copy to:

1. The Chief Controller (Pensions), CPAO, New Delhi for information.
2. PPS to CGA
3. PPS to Additional CGA (SG)
4. PPS to Additional CGA (HR&O)
5. PPS to Additional CGA (ARPR)
6. All Joint CGAs
7. The Sr. AO (ITD-Shri KV Hamza) for uploading on website.

Government of India
Ministry of Finance,
Department of Expenditure
Controller General of Accounts
PFMS Division

Mahalekha Niyantrak Bhawan,
GPO Complex, 'E' Block, INA, New Delhi-110023
Dated 18th April 2022

Subject: **Important instructions for PFMS Pension Module – functionality to change Gratuity Recovery Head and Grant Head by PAO user for applicable cases.**

In continuation to this office OM No. No. I-95/4/2020-ITD-CGA(E 2554)/259 dated 07/08.12.2021 on the subject cited above, it is to inform that the provision for change of Gratuity Recovery Head Details as well as Grant Head has been provided for PAO users in their respective Login ID.

2.   This functionality to change Gratuity Recovery Head as well as Grant Head has been provided to accommodate for the following scenarios being faced by PAO users in the pension module, *after they have Digitally Signed the PPO*, where the gratuity recovery head and/or granthead stand changed in the next Financial Year.

Scenario A: Returned Case is returned by the sanction module due to error '*Landing failure*' due to "*Recovery Head not found*" or "*Financial Year Closing*".
Scenario B: Rejected Sanction has been pushed for Gratuity payment, however, with inactive Financial head(s)/Financial year mapped. In such cases, it is mandated that the sanction generated is rejected in the PFMS sanction module itself(only for pending payment cases).
Scenario C: Yet to be received PPO has been digitally signed but is yet to be pushed to the Sanction module for Gratuity payment. Recovery head is available in the sanction.

3.   A user manual for this functionality is attached. It is requested that the PAOs refer to the same for ensuring appropriate action required at each level for such scenarios.

This issues with the approval of competent authority.

(V. Muthu Kumar)
Asstt. Controller General 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.

Copy to:
1. The Chief Controller (Pensions), CPAO for information please.
2. The Sr.AO (GIFMIS – Shri KV Hamza) for uploading on website

Pension Module

User Manual

for

"DSC through Java / browser neutral DSC"

Contents

Quick Action Menu

Sr No.	Name of Screen	Menu	Login	Action
1	PPO Allotment	Menu >> Pension>>ePPO>>Browser Neutral>>Alloc& Gen. of e-PPO	PAO	Allotment of PPO Number (Get PPO Number from CPAO button)
2	Generate e-PPO	Menu >> Pension>>ePPO>>Browser Neutral>>Alloc& Gen. of e-PPO	PAO	e-PPO generation for allotted PPO Number (Show PDF button)
3	e-PPO Approval	Menu >> Pension>>ePPO>>Browser Neutral>>ePPO Approval	DH	Verify and Action by DH(Approve/ Reject)
4	e-PPO Approval	Menu >> Pension>>ePPO>>Browser Neutral>>ePPO Approval	AAO	Verify and Action by AAO (Approve/ Reject – Dh status and remarks will be displayed)
5	e-PPO Digital Sign	Menu >> Pension>>ePPO>>Browser Neutral>>ePPO(DSC) Win	PAO	Verification and Action taken (DH & AAO Status and Remarks will be displayed)

2

Introduction

Presently, pension case forwarded by Head of Office (HOO) through Bhavishya lands in PFMS Pension Module at DH level for checking in "**Pension >> Manage Pensioner**" menu. All the details are required to be checked by DH, DH passes/reject the case with remarks and forwards the case to next level i.e.,AAO.AAO also verifies the details of the case and also checks the calculations. Thereafter, AAO passes/rejects the case with remarks and forwards the same to next level i.e., PAO. PAO also verifies the details of the case and checks the calculation and if intends to reject the case, the same is returned to HOO with remarks for rectification the case. If PAO find the case correct and passes the case:

The case available for PPO allotment at PAO Login in both options.

i) Through JAVA (existing module)
ii) Through Browser neutral DSC (Win)

PPO Number Allotment-There is no changes in allotment of PPO number in pension module of PFMS either through JAVA Base DSC or Browser neutral DSC

1) JAVA Based (existing Module)

At PAO login

In present scenario, PAO user needs to select ePPO>>JAVA Based>> PPO allotment

3

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O/o Controller General of Accounts, Ministry of Finance

Pension	▷	Manage Pensioner	
Users	▷	EOP Manage Pension	
Failed Transaction	▷	Sanction ▷	
Sanctions	▷	e-PPO ▷	Browser Neutral DSC ▷
Admin Master	▷	Utilities ▷	JAVA Based ▷ Old PPO Allotment
NER Corrections	▷		DSC ePPO List [JAVA Based]
Transfer Entry	▷		ePPO Verify & Submit to CPAO
Review Sanctions	▷		ePPO DSC Revert
Bank Reconciliation	▷		ePPO Reupload To CPAO
Monthly Accounts Processing	▷		ePPO returned by CPAO
Employee Info. System			

STEP-1   PPO Number generation

Click on Get PPO Number from CPAO after filling in the DDO code, file no,

Pensioner Name

4

STEP-2e-PPO generation

Click on *generate e-PPO* **Button**

STEP-3 DSC process on IE 11

(1) On clicking Digitally Sign Button, processing for Digital sign through JAVA is initiated for digital signature in ePPO.

5
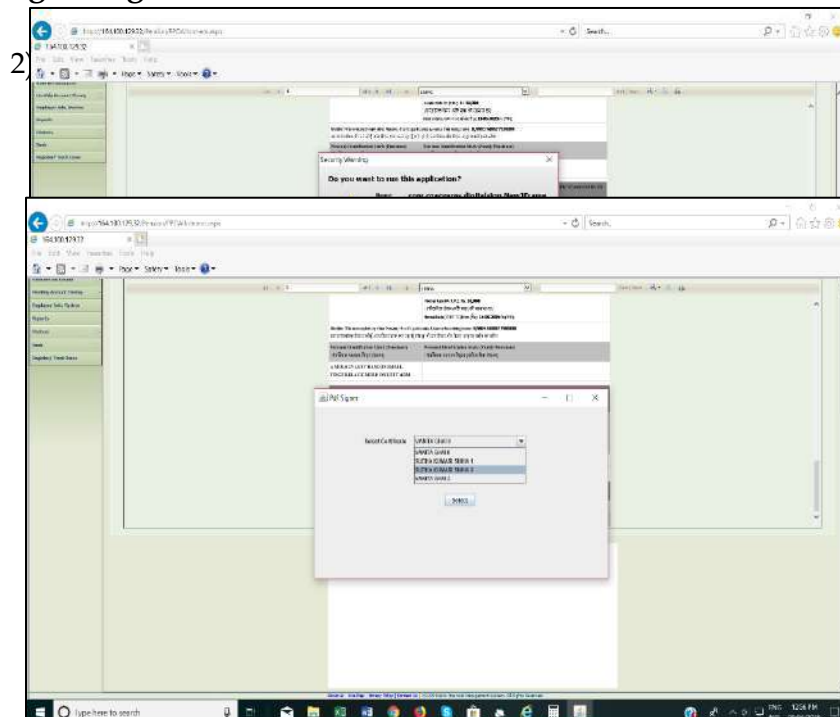
(3) Confirm dialog box appear, click on "yes" to sign in
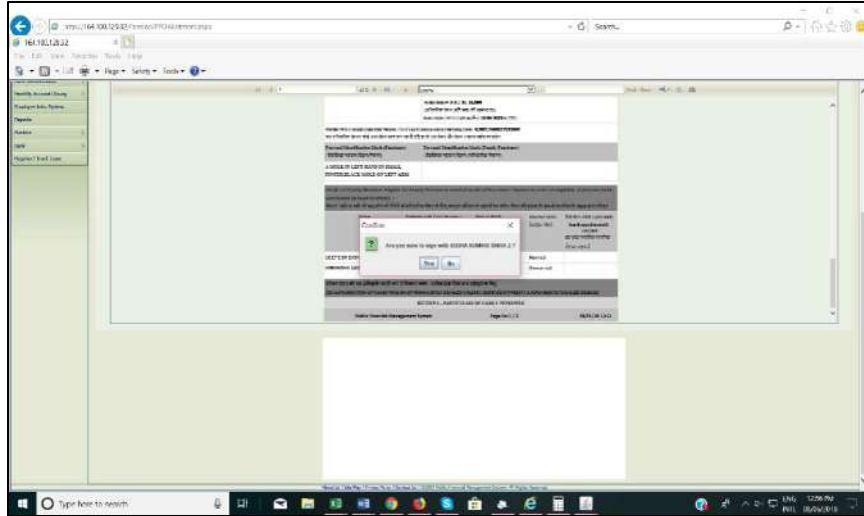
(4)Enter the User PIN and click on Login

6
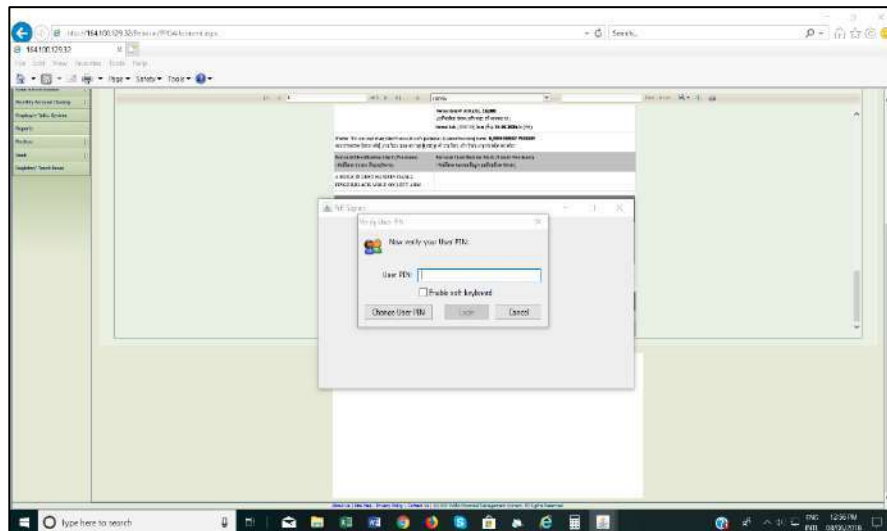
(5) Digital signing is successful and its confirmation appears in a dialog box.
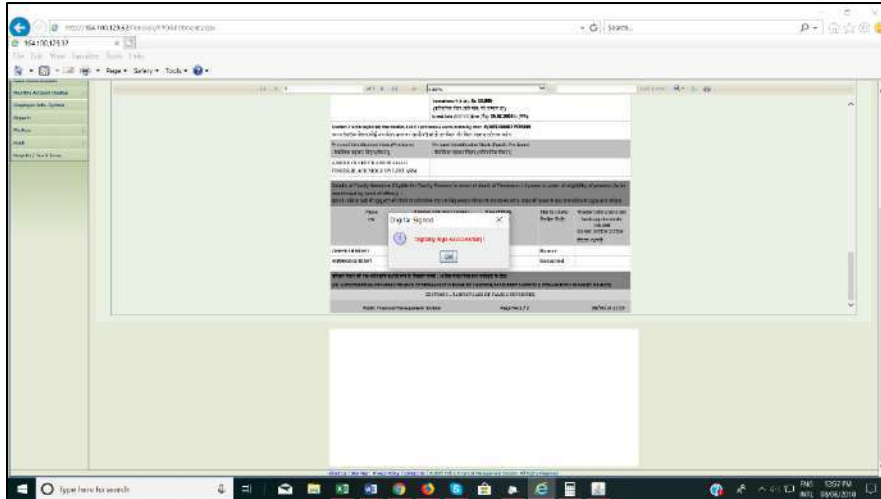
(II) The introduction of browser neutral DSC, which allows DSC in ePPO to be performed using any browser, such as Google Chrome, Firefox, or Microsoft Edge.

Install and run "Download DSC Window Application (version:1.0.1.2)" to digitally sign ePPO pdfs using Window DSC through Pension>>ePPO>>Browser neutral DSC>> DSC ePPO (win). Window should be Window 10 or above

(Those users who have already created e bills or monthly accounts are exempt from installing the DSC window application.)

At PAO login

PAO need to login and go to the page using menu mentioned below:

Menu >> Pension>>Alloc& Gen. of ePPO (Win)

7

Screen -1

This will open the page shown in Screen -2, here User need to select DDO Code, File No, from the drop-down list (Screen-3), Pensioner Namewill be auto displayed then click on **"Get PPO Number from CPAO"** button.

Screen -2

This will generate a PPO number which will get displayed in the PPO No. box in non-editable format and a message will be displayed on top – **"PPO Allotment successfully"**.

Pension Case type will be displayed in front of Pensioner Name.

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Screen -3

E-PPO Generation
At PAO login

Menu >> Pension>> Alloc& Gen. of EPPO

Once PPO Number is allotted, User needs to go to **Generate e-PPO** section of this page as shown in Screen-4. Select the PPO No. from the dropdown list (Screen-5) and click **"Show PDF"**button**.**

Screen -4

PPO Allotment

--Select--
N33195210076 (ANSHUL SINGH)
N33195210054 (TESTUSERTHREE)
N33195210047 (MILI KHANA)
N33195210032 (SAURABH KALA)
N33195210010 (FAMILY CASE)
920012000042 (Ajeet Kumar Rajbhar)
920012000040 (Sahasranaman n r)
684472006167 (Gautam Ghosh)
331952200199 (NEPAL TEST CASE)
331952200180 (TESTUSERFOUR)
331952200177 (Nayanmani Das)
331952200124 (MUNESH KUMAR)
331952200069 (SHIDARTHA)
331952200025 (RAJPAL SINGH)
331952200010 (Saurabh Chaturvedi)
331952100570 (RUPESH KUMAR)
331952100558 (AJAY)
331952100543 (Manohar Chhotubhai Valmiki)
331952100509 (DHARAM PAL)

DDO Code:*

File No:*

Pensioner Name:*

PPO No: from CPAO

PPO Date:

Note: PAO may please check the date of reduced pension for correctness b...   EPPO.

PPO No: 331952100543 (M. ▼   Show PDF   Reset   ReGenerate ePPO

Note: After viewing,please proceed to DSC of eppo in Pension module. (Pension-> Eppo DigitalSign).

Screen -5

Once PPO Number is selected, User needs to click the"**Show PDF"** button, the e-PPO will be generated and displayed. User needs to check all the details, download option is provided for User to Download the pdf (Screen - 6).

Using **Regenerate e-PPO** button e-PPO can be regenerated if found incorrect.

The e-PPO generated or regenerated needs to be Vetted / Approved at DH and AAO level before passed to PAO level for DSC.

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Screen -6

Now this e-PPO will be available at respective DH level for Approval/Rejection action.

e-PPO Approval / Rejection
DH Level Login

User need to login and go to the page using menu mentioned below:

Menu >> Pension>> Pension e-PPO Approval

Screen -7

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User needs to Select the PPO number for the drop-down list (Screen-8). Only PPO Number pending for Approval will be available in the drop-downlist to respective login Id.**"Show EPPO"** button will be activated once the PPO no. is selected from the list (Screen-9).

Screen -8

Screen -9

Click **"Show EPPO"** button, the pdf will be displayed, for User to verify, with **Download** and **Print** option (Screen – 10).

12

Screen -10

After Verifying the e-PPO PDF details, User needs to verifywhether generated pdf is correct or incorrect. User shall scroll down the pages using scroll bar at the right side and validate all the details.

➔ If generated PDF is correct then User need to select '**Yes'** check box, write Remarks and click on **Approve**Button(Screen-11).**Approve** button will become activated as soon as User checks the '**Yes'**checkbox.

13

Screen -11

Success message will be displayed (Screen-12).

Screen -12

→ If generated PDF is incorrect then User need to select 'N**o'** check box, write Remarks and click on **Reject** Button Screen -13. **Reject**button will become activated as soon as User checks the '**No'** checkbox.

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O/o Controller General of Accounts, Ministry of Finance

Screen -13

Success message will be displayed (Screen-14).

Screen -14

AAO Level Login

User needs to login and go to the page using menu mentioned below:

Menu >> Pension>> e-PPO Approval

Screen -15

User needs to Select the PPO number from the drop-down list (Screen-16). Only PPO Number pending for AAO Approval will be available in the drop-down list to respective login Id. **"Show EPPO"** button will be activated once the PPO no. is selected from the list (Screen-17).

Screen -16

Screen -17

Click **"Show EPPO"** button, the pdf will be displayed, for User to verify, with **Download** and **Print** option (Screen – 18).

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➔ DH Remarks and e-PPO Status will be displayed to AAO for reference. AAO User needsto take action - **Approve or Reject by selecting the 'Yes' or 'No'** checkbox(Screen-18).

Screen -18

After Verifying the PDF details, User needs to verify whether generated pdf is correct or incorrect.

➔ If generated PDF is correct then User needs to select '**Yes'** check box, write Remarks and click on **Approve** Button (Screen -19).

Screen -19

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Approve button will become activated as soon as User checks the '**Yes**'checkbox.Success message will be displayed (Screen-20).

Screen -20

➔ If generated PDF is incorrect then User need to select N**o** check box, write Remarks and click on **Reject** Button Screen -21. **Reject** button will become activated as soon as User checks the '**No'**checkbox.

Screen -21

Success message will be displayed (Screen-22).

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Screen -22

e-PPO Digital Sign
PAO Level Login

Menu>> Pension>> EPPO Digital Sign

Screen -23

User needs to select the PPO number from the dropdown list (screen-24), meanwhile the **"Show PDF"** button will remain inactive until the PPO No is selected.

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EPPO Digital Sign

EPPO

Download DSC Window Application (Version : 1.0.1.2)

PPO No: --Select--   [Show EPPO]   [Digitally Sign]

Screen -24

Now click **"Show PDF"** button (only those PDF of ePPO are available which have been approved/ rejected by DH and AAO) (Screen 25).

EPPO Digital Sign

EPPO

Download DSC Window Application (Version : 1.0.1.2)

PPO No: 331952200124 (MI ✔   [Show EPPO]   [Digitally Sign]

Screen -25

➔ PAO User will be able to view the **Status and Remarks of DH and AAO**, for reference (Screen – 26).
➔ User needs to verify the details of generated PDF (Screen -25).Meanwhile the **Digitally Sign** button will remain Inactivated.

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Screen -26

➔ Once the details are verified, User needs to select the checkbox for generated pdf whether it's correct or not.

➔ If the generated pdf found Okay, User needs to select **"Yes"** check box as shown in Screen – 27. This will activate the **"Digitally Sign"** button.

21
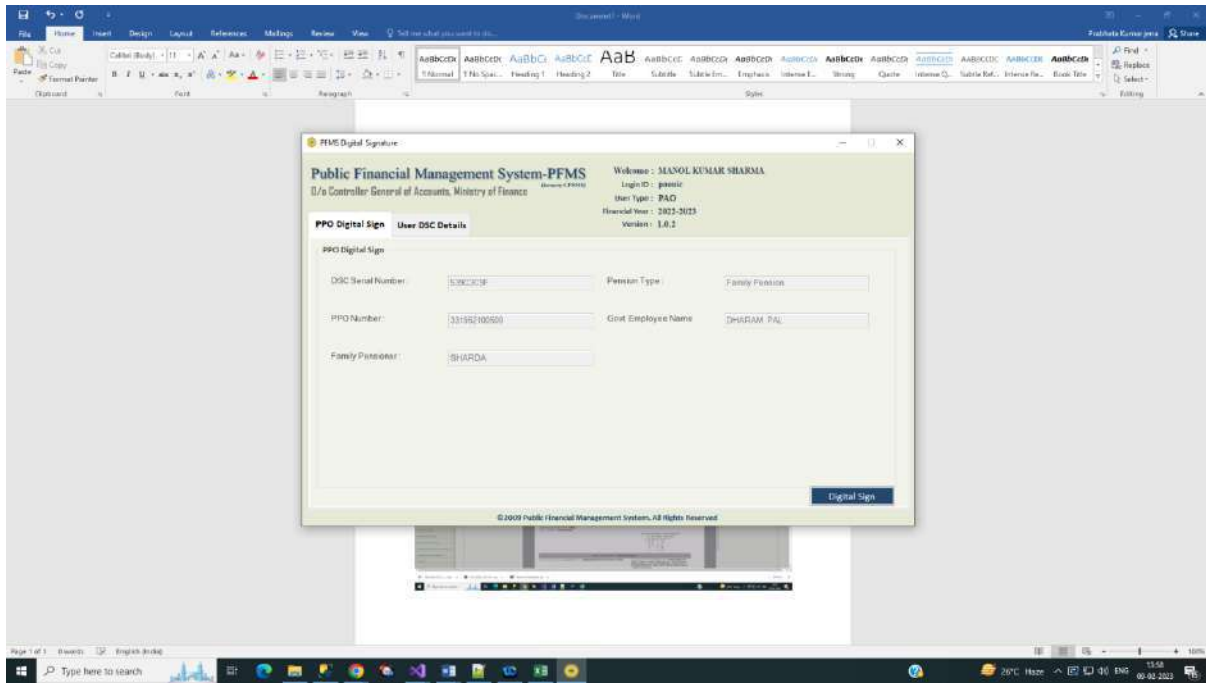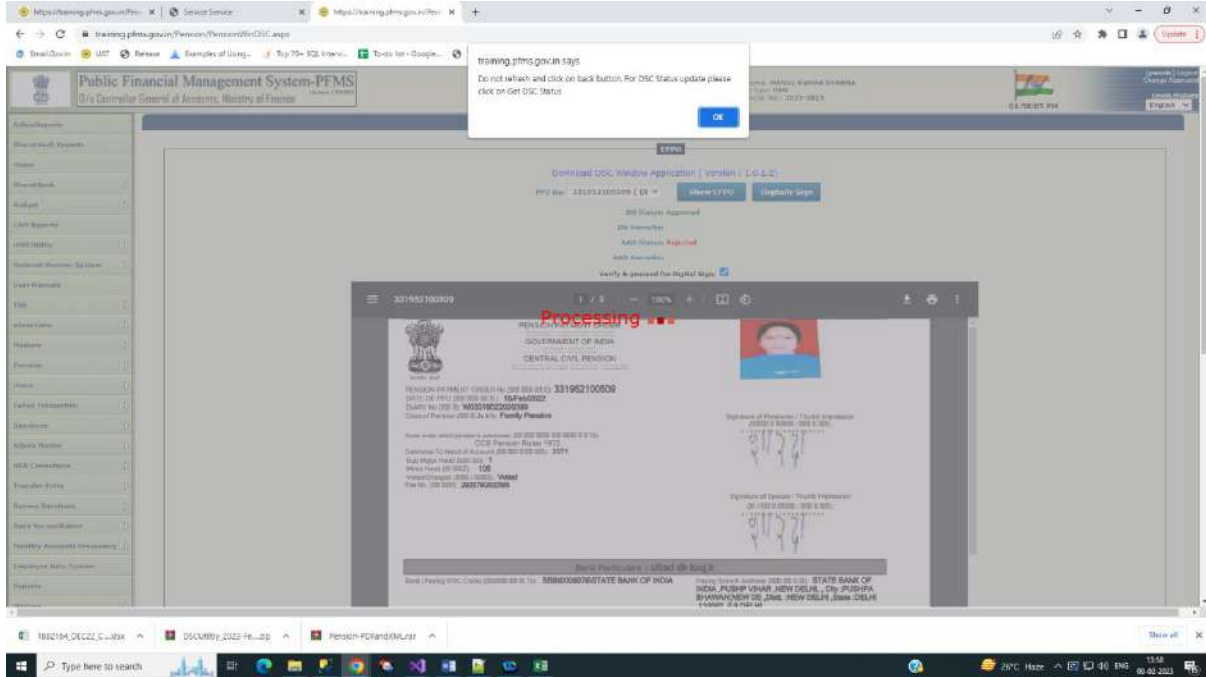
Screen -27

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https://www.govtstaff.com

When User clicks on **"Digitally Sign"** button, confirmation and success message will be displayed.

User can Digitally Sign the e-PPO from here, and after that this digitally signed e-PPO will be available at PAO login for **Digitally signed e-PPOVerification and Submission to CPAO** for further processing.

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

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Public Financial Management System - PFMS
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Pension Module

User Manual
for
"e-PPO Verification & Submission to CPAO", "DSC Reversion prior to submission to CPAO" & "e-PPO Re-upload after submission to CPAO" at PAO Login

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Contents

Quick Action Menu

Name of Screen	Menu	Login	Action
e-PPO Verify & Submit to CPAO	Menu>>Pension>> e-PPO Verification and Submission to CPAO	**PAO**	Verification and e-PPO Submission to CPAO
DSC Revert prior to submission to CPAO	Menu>>Pension>>PAO DSC Revert	**PAO**	DSC Reversion of e-PPO prior to submission to CPAO
e-PPO Re-upload after submission to CPAO	Menu>>Pension>>e-PPO Re-upload to CPAO	**PAO**	Re-upload ofePPOat CPAO website

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Introduction

This Manual will help the User to understand the process for

a) **Verification of ePPOby PAO and Submission to CPAO**
b) **DSC Revert of ePPO prior to submission to CPAO**
c) **ePPO Re-upload on CPAO website after submission of case to CPAO**

Presently, pension case forwarded by Head of Office (HOO) through Bhavishyalands in PFMS Pension Module at DH level for checking in "**Pension>>Manage Pensioner**" menu. All the details are required to be checked by DH, DH passes/reject the case with remarks and forwards the case to next level i.e. AAO.AAO also verifies the details of the case and also checks the calculations. Thereafter, AAO passes/rejects the case with remarks and forwards the same to next level i.e. PAO. PAO also verifies the details of the case and checks the calculation and if intends to reject the case, the same is returned to HOO with remarks for rectification the case. If PAO find the case correct and passes the case, the case lands for PPO allotment at PAO Login. Once PAO generates the e-PPO and digitally signs, the ePPO lands at CPAO website.

However, in the new scenario as and when PAO digitally signs ePPO, the same case will be available at**new Menu i.e. Verification and Submission to CPAO**for final verification. In this menu, PAO will be able to view digitally signed PDF of ePPO and after final verification, may submit the same to CPAO. If the ePPO is not correct, PAO will be able to revert DSC prior to submission of ePPO to CPAO. After submission of ePPOto CPAO, authorities will be available in Pension module under CAM reports. PAO will be able to submit sanctions to DDO for preparation of bills for payment.

For this purpose, new menu at each Login has also been provided as under: -
DH level

Pension	▷	Create Pensioner
Users	▷	Manage Pensioner
Failed Transaction	▷	EOP Manage Pension
Sanctions	▷	Sanction
Transfer Entry	▷	e-PPO
Bank Reconciliation	▷	Revision Cases
Employee Info. System		Utilities

AAO level

PAO level

a)e-PPO Verification and Submission to CPAO

Before Transmission of digitally signed e-PPO to CPAO and its intimation to Bhavishya, PAO User must verify the Digitally Signed document for any discrepancy (like incomplete data, missing photograph, signatures and corrupt document etc.).

After PAO User is satisfied with the details, PAO User may submitDigitally Signed e-PPO to CPAO. After submission of ePPO to CPAO, PAO User will be able to push the Sanctions (Gratuity, commutation etc.) to DDO for further processing.

The detailed steps for the same are given as under:

PAO Login Menu

PAO User needs to login and go to the page using menu mentioned below:

Menu>> Pension>> e-PPO Verify and Submit to CPAO (Screen-1).

Screen-1

This will open the **e-PPO Verify & Submit to CPAO**page, now PAO User needs to select the required DDO Code and PPO number from the drop-down list to which action needs to be taken.

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Screen-2

Select Details

PAO User needs to select the DDO Code and PPO number from dropdown list(Screen-2); as soon as PAO User selects the required details, Pensioner details like – PPO Number, PAN, Pensioner Name, Pension Class and e-PPO will be displayed(Screen-3).e-PPO Download and Print options are also available at the right most corner of the display frame.

Screen-3

PAO User **has to thoroughly check ePPO and Scroll down PDF of ePPO**. PAO user will findfollowing two radio buttons for selection in taking necessary action(Screen-4):

➢ The details in the selected e-PPO have been Verified and found to be Correct,

&

➢ The details in the selected e-PPO have been Verified and found to be Incorrect

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○ The details in the selected e-PPO have been Verified and found to be Correct   ○ The details in the Selected e-PPO have been found Incorrect

Screen-4

PAO User has to select first radio button when the PDF of ePPO is checked and found correct (Screen-5) thereafter PAO user has to click **"Submit to CPAO"** button. After submission to CPAO, the digitally signed ePPO will land CPAO's website. Otherwise PAO User may click on "**Reset**" button, it will take the User to Screen-2.

Screen-5

Before final submission, PAO User will be asked for the final time to check before final transmission – **"Are you sure to transmit the Verified e-PPO to CPAO"**(Screen-6).

Screen-6

PAO User needs to click "OK", if e-PPO details are found correct and User is satisfied that all the details are correct, it will be forwarded to CPAO, otherwise click "Cancel".

Once the confirmation is clicked OK, success message – **"ePPO Verified Successfully"** (Screen-7) will be displayed on the screen, and file will **be forwarded to CPAO for further processing.**

Screen-7

This completes the e-PPO verification and Submission to CPAO process from PFMS Pension.

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If the e-PPO details are checked and found Incorrect, PAO user may select the radio button for – **"The details in the selected e-PPO have been found Incorrect",**thereafter click **"DSC Revert"** button (Screen-8).

Screen-8

When PAO User clicks on **"DSC Revert Button"**the page will be redirected to the **e-PPO DSC Revert** page, and PAO User needs to complete the process of DSC Reversion (Screen-9).

Screen-9

Note: If the case is pending with PAO for DSC Revert, then case will not be available for verification and submission page.

b) DSC Reversion prior to submission to CPAO

For DSC Reversion, PAO User has to enter the required details i.e. PPO or PAN number (Screen-10) and click search button.

Screen-10

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After entering the data, details of case will be displayed such as Pensioner/Family Pensioner Details, Payment Details, Revision Case and DSC Revert History. PAO User has to View PDF of e-PPO and check the entire details properly before acting (Screen-11).Thereafter, PAO user has select to select the check box – "Certified that the Digital Signature on this e-PPO is to be reverted." (Screen-12)

Screen-11

Screen-12

PAO User needs to select the Reason for DSC Revert (Screen-13). Based on the Reason selection, DSC will be Reverted with/without financial change (with or without editing power to Head of Office) (Screen-14). PAO user will be able to revert DSC with one or multiple reasons by selecting appropriate reason(s).

Screen-13

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Radio buttons for **DSC Revert with/without Financial Change** will be auto selected as per the Reason selection by User. Thereafter, PAO user has toclick "**Proceed with DSC Revert".**System will ask for the confirmation: **"Do you want to process the DSC Revert?"** and PAO User has to take the action for the same.

PAO User can select multiple options from dropdown (max three options)

Screen-14

Max 3 reason selected for DSC revert which are available here also

Screen-15

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training.pfms.gov.in says

Do you want to process the DSC Revert?

OK   Cancel

Screen-16

Wrong photograph uploaded   ⌄

Dsc Revert without Financial Change   Dsc Revert with Financial Change

Proceed with DSC Revert   Cancel DSC Revert

Screen-17

training.pfms.gov.in says

Do you want to process the DSC Revert?

OK   Cancel

Screen-18

e-PPO DSC Revert

DSC revert for PPO accepted
Search PPO

Search By :   PPO No   PAN
PAN NO: AYYPS4197A

Search   Reset

Screen-19

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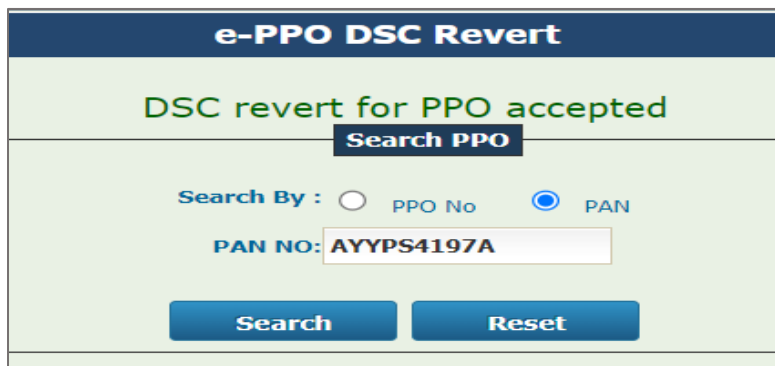
User will get the Success message for DSC Reversion (Screen-19).**Thereafter, same case will be available in utilities at PAO login in Pension Module of PFMS.**

Note:

(a) **DSC revert option at PAO login will only be available for 2 times prior to submission to CPAO.**

(b) After reversion of DSC without financial change, PAO may revert case back toHoO, if required. HoO will not be able to change data where financial impact is available. Only Photograph, signature, undertakings etc. will be available for change at HoO level.

(c) After reversion of DSC with financial change, PAO has to mandatorily return pension case to HoO for editing/correction. HoO will be able to edit case as usual.

(d) In any case, HoO has forwarded the case back to PAO without change/editing the data, the case will be converted to without financial change and PAO office will not be able to convert the case back to with financial change.

(e) Now, PAO has to again pass, digitally sign and then revert DSC revert with financial change. Thereafter, PAO will be able to return the case back to HoO with financial change.

DSC Reversion can be done through Direct Menu:

At PAO Login>> Pension Menu>>ePPO DSC Revert (Screen-20)

Screen-20

c) e-PPO re-upload at PAO login after submission to CPAO

When the pension case has been processed and submitted to CPAO, digitally signed ePPO is available at CPAO's website. At the time of checking of case in CPAO, some errors are found in physical booklets, PDF of ePPO is not available; CPAO returns the case back to PAO office for rectification and request for re-upload of ePPO. This page provides the feature of re-upload of ePPO at PAO login (Screen-21).

Menu:

Screen-21

PAO User has to enter PPO number and click the **Search** button (Screen-22).

Screen-22

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Screen-23

All the details will be displayed including Controller Code, PAO Code, DDO Code, Pensioner/ Family Pensioner Details and ePPO Re-Upload History (if any) (Screen-24).

User needs to click **View e-PPO** button and check the details. PDF of ePPO will be shown.

Screen-24

Once e-PPO is checked properly, display can be hide using **Hide e-PPO** button(Screen-25)
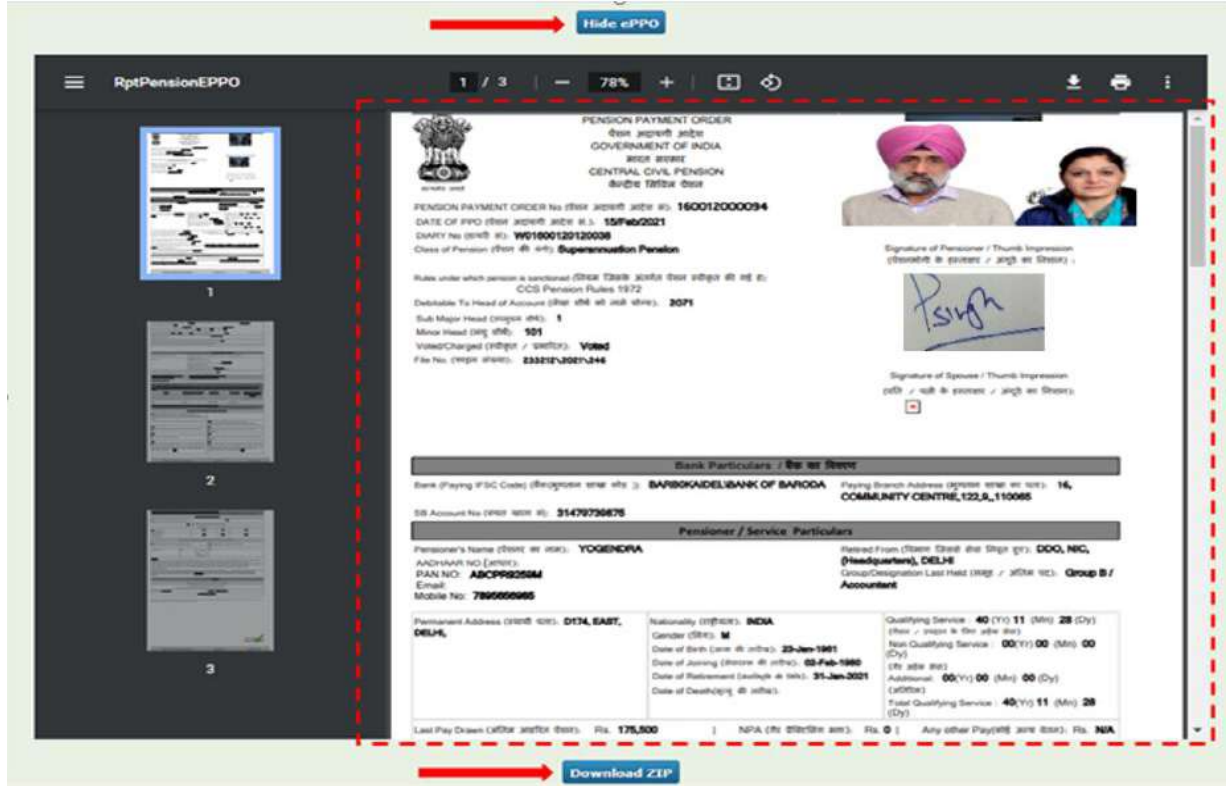
Screen-25

PAO User has to Click on **Download ZIP** button first and check the Zip files (Screen-26).

Screen-26

A Zip Folder will be downloaded. PAO User has to extract Zip Folder and there will be three filesnamelyXML signed file, Bank Undertaking PDF and e-PPO PDF (Screen-27). All three files may be opened and checked properly. If all the files are correct, PAO User may select Radio Button correct (Screen-26). Thereafter Repush button will be available at PAO User (Screen-28).
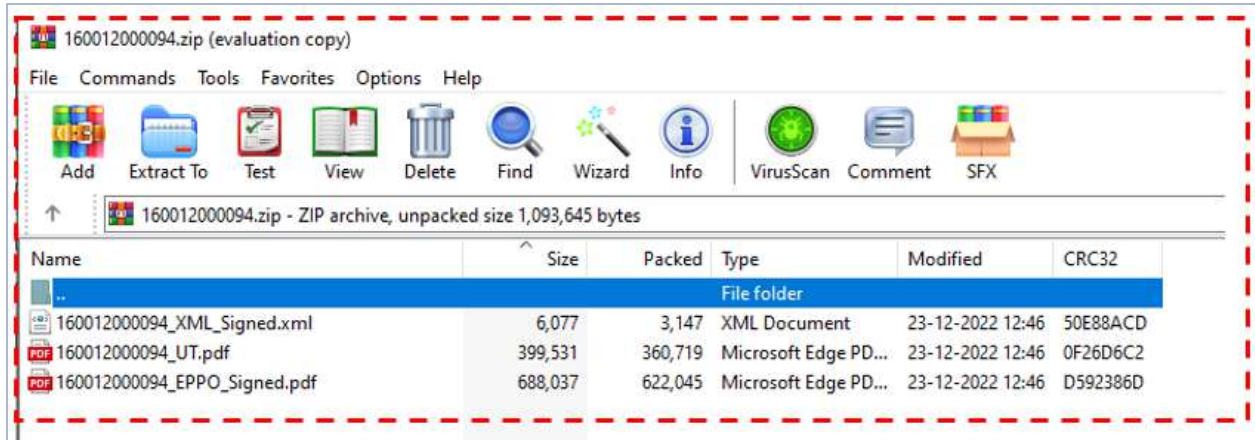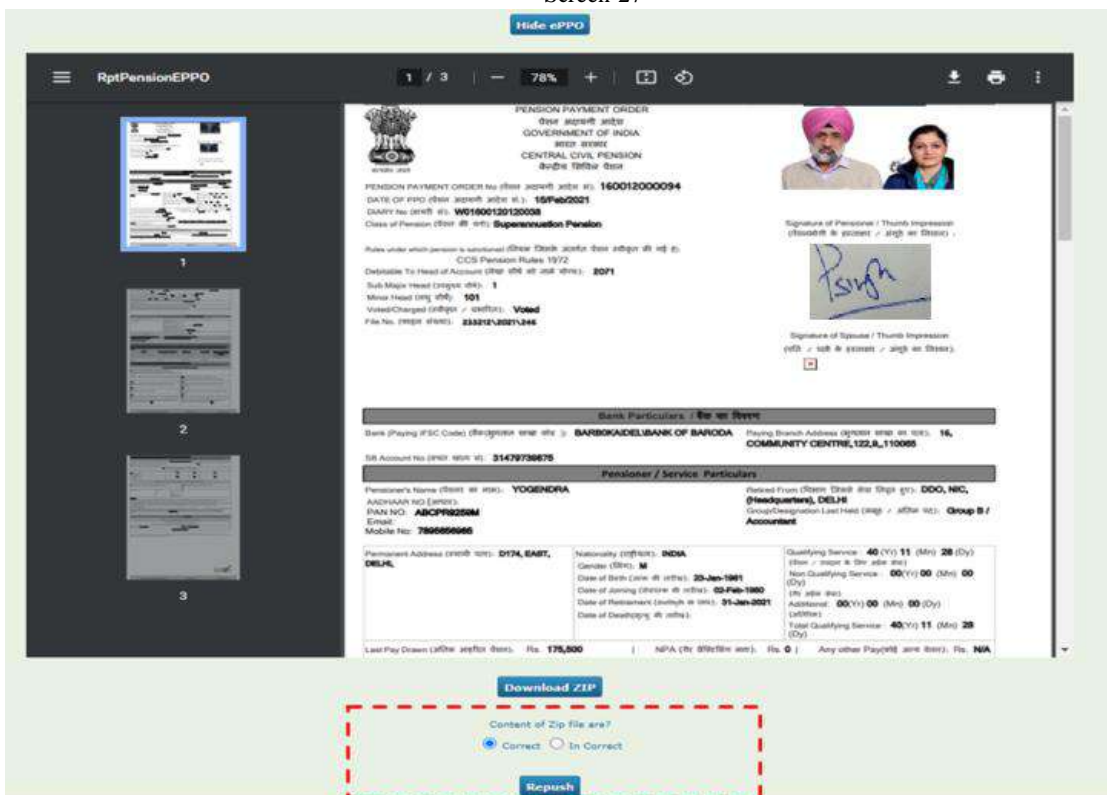
Screen-27

Screen-28

As and when PAO clicks on Repush button, ePPO will be Re-uploaded to CPAO's website successfully (Screen-29)

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ePPO 160012000094 Reuploaded Successfully

Search PPO

PPO No : 160012000094

Search   Reset

Screen-29

If files are corrupted or incorrect, PAO User may select Incorrect option available. Thereafter, Radio Button "Recreate Zip" will be made available (Screen-30).

Screen-30

Zip folder will be recreated successfully (Screen-31) and PAO user has to again download zip folder. Rechecking is required before finally re-uploading the files. If the documents are correct, PAO user may re-push the ePPO to CPAO.

Note: After recreation of Zip Folder and the file documents are still incorrect, then there is no need to re-upload of ePPO by PAO User and action for DSC reversion is required for correction of data.

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Screen-31

After cross checking the files again, click on **"Re-push"** button (Screen-32).

Screen-32

PAO User will get the successful message once the files get re-pushed successfully (Screen-33).

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Screen-33

Reports

For the assistance of PAO office, following two typesof Reports have also been provided in CAM Report under Pension

- **CAM Report>> DSC Reversion**
  - o It will contain following sections
    - S. No.
    - Name
    - PAN No. /PPO No.
    - DSC reversion date
    - Reason
    - With/without financial Change

- **CAM Report >>ePPO Re-upload Report**
  - o It will contain following sections
    - S. No.
    - Name
    - PPO No.
    - ePPO Re-upload date

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Pension Module

User Manual

For

"Shifting of pending sanctions from inactive DDO to active DDO withinPAO"

Contents

Shifting of Inactive to Active DDO – DHLevel (without clearance)

Quick Action Menu

Name of Screen	Menu	Login	Action
Clearanceof pending sanction	Menu>> Pension>>Utilities>>DDO change by PAO	**DH**	Clearance of pending sanction from PFMS to Pension Module
Shiftingof pending sanction to active DDO	Menu>> Pension>>Utilities>>DDO change by PAO	**DH**	Initiatingpending sanctionsin Pension Module from Inactive to Active DDO
Shiftingof pending sanction to active DDO	Menu>> Pension>>Utilities>>DDO change by PAO	**AAO**	Verifying of pending sanctions in Pension Module from Inactive to Active DDO
Shiftingof pending sanction to active DDO	Menu>> Pension>> Utilities>>Shifting of pending sanction to active DDO	**PAO**	Final Approval for all the cases from inactive DDO to active DDO

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Introduction

Pension case is processed from one DDO Code and forwarded to concerned PAO. All the bills for pensionary benefits are paid by the original DDO Code from where the case has been forwarded to PAO. In some of cases, DDO Codes get inactive and sanctions are pending for payment to the beneficiaries. In that scenario, case needs to be shifted to new DDO Code and PAO has to forward the pending sanctions to new DDO Code. For this purpose, process for shifting of pending sanctions from inactive DDO Code to active DDO Code is required. The following process has been envisaged in Pension Module: -

d) **Shifting of pending sanctions from inactive DDO to active DDO within PAO by 3 Level Passing**

At the time of shifting of pending sanctions from inactive DDO to active DDO within PAO, it will be essential to verify which sanctions are pending for payment under the inactive DDOs. There are following three scenarios for which sanctions are pending in inactive DDOs: -

I)   Sanctions are available at any level i.e. DDO, DH, AAO and PAO login **in Sanction Module of PFMS** in deactivated DDO code.

II)   Sanctions are available in sanction generation form at PAO login in deactivated DDO code in Pension Module of PFMS

III) Sanctions are available in Re-push failed/returned sanctionmenu available in Utilities in Pension Module of PFMS at PAO login in deactivated DDO code

For Item No. I) above, it will be mandatory to clear the sanction from PFMS Sanction Module first, so that, next step of shifting of sanction from inactive to active DDO may be taken up. Clearance of sanction from PFMS Sanction Module will be taken up by DH user only.

Once the final action to save the shifting decision is taken, the newly assigned DDO will be able to view the sanctions which are re-assigned to them for further processing. The case may be available at active DDO with new file number (i.e. next available number in the DDO).

Clearance of pending Sanctions – DH Level

DH User will login in their account and selects menu option in DDO Change by PAO in Utilities in Pension Module. DH will require to process clearance of the Sanction initially to shift DDO as sanctions are pending in PFMS Sanction Module at any level i.e. DDO, DH, AAO and PAO.

e) Menu>>Pension>>Utilities>>DDO change by PAO

f) User can view the Controller code and PAO, select the inactive DDO and click on search button

The image shows PFMS screen for "Shifting Pension Case From Inactive To Active DDO"

g) Select Pensioner details and click on Clearance of Sanction once and user will get the message that "Sanction is Cancelled" at PFMS Sanction Module. Now sanctions will be available at Pension >> Sanction >>Failed sanction/returned sanction

h) Thereafter, DH may search again the status of sanctions and now sanction will be available for shifting of DDO

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i) Now DH will add and view the following details
   - Controller Code, PAO code, DDO code of inactive DDO
   - Default Controller Code, PAO code will be automated for active DDO as well(PAO code and Controller code will be same of active and inactive DDO)
   - Select active DDO code
   - Add remarks
   - click to **Forward to AAO**

Shifting of Inactive to Active DDO – DHLevel(without clearance)

DH User will login to their account and selects menu option in DDO Change by PAO in Utilities in Pension Module. No action is required for clearance of sanction to be taken by DH User as no sanction is pending at PFMS Sanction Module.

j) Menu>>Pension>>Utilities>>DDO change by PAO

k) User can view the Controller code and PAO, select the inactive DDO and click on search button

l) Select Pensioner details and click on **Shift DDO**

m) Add and view the following details

> o Controller Code, PAO code, DDO code of inactive DDO

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- o Default Controller Code, PAO code will be automated for active DDO as well(PAO code and Controller code will be same of active and inactive DDO)
- o Select active DDO code
- o Add remarks
- o click to **Forward to AAO**

Shifting of Inactive to Active DDO (AAO Level)

AAO selects a case for which DDO shifting needs to be done and verifies the details of the new DDO.

n) Menu>> Pension >> Utilities>> DDO Change by PAO

o) Select Pensioner PAN Number from dropdown

p) Review the details of pensioner and DDO and add the remarks
q) Click on Forward to PAO

Shifting of Inactive to Active DDO (PAO Level)

PAO selects a case for which DDO shifting needs to be done and verifies the details of the new DDO.

Menu>> Pension >> Utilities>> DDO Change by PAO

r) Select Pensioner PAN Number from dropdown

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s) Review the details of pensioner and DDO and add the remarks
t) If PAOfinds its incorrect, they have to put their remarks and select Return to DH
u) After clicking on Return to DH, the case will land at DH level and DH will have to review the case with PAO remarks. Thereafter, full process will be carried out again by each user.

v) If PAO finds its correct, they have to click Approve button
w) After clicking on Approve button PAO User will have to check the status of sanctions at what stage the same are available i.e. Sanction submission stage or sanction available at Re-push failed/returned sanction stage.
x) If the sanction is available at submission stage, PAO has to submit the sanction

y) If the sanction is available at Repush failed/permanently cancelled sanction, PAO has to repush the sanction

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