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Government of India
Ministry of Finance Department of Expenditure
Controller General of Accounts
PFMS Division (GIFMIS)

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

OFFICE MEMORANDUM

Subject: Important instructions with regard to new development in Pension Module for PAOs in PFMS Portal – Online Return process of pension cases from CPAO to PAO

The undersigned is directed to refer to the subject cited above and to inform that the process flow for the online return of pension cases from CPAO to PAO through the Pension module at PFMS has been developed and deployed.

2. 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.

3. 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 also 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.

4. 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.

5. If errors are in e-PPO or complete case is wrong, 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 case 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.

6. 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 canceled 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 partial recovered amount will not allow DSC reversion at PAO login.

7. The User Manual for the aforementioned development is attached for information and strict adherence, please.

8. This issue with the approval of Competent Authority

Encl: As above



(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. Sr.AO (GIFMIS) for uploading on website.

Pension Module

User Manual

for

***“Return Flow of Pension Case
from CPAO”***

Contents

Quick Action Menu	2
Introduction	3
Return of Pension Case from CPAO at PAO Login:	3
Process at DH Login	7
Process at AAO Login	12
Process at PAO Login	15

Quick Action Menu

Sr No.	Name of Screen	Menu	Login	Action
1	Return of 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 DHLogin	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

The screenshot displays the PFMS portal interface. On the left is a vertical menu with various system options. The 'Sanctions' menu item is expanded, showing a sub-menu with 'e-PPO' selected. The 'e-PPO' sub-menu is further expanded to show a list of options, including 'ePPO returned by CPAO'. The main content area shows a header 'Agency Bank Account Validation Status' and a table with a warning message: 'All errors has occurred in this page, please contact administrator'. The URL at the bottom left is 'https://training.affm.gov.in/Pension/Pension/CPAO/ePPO/ePPORevert.aspx'. An 'Activate Windows' watermark is visible in the bottom right corner.

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

- View details of Pensioner and click on View ePPO

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	PEWS/2019/027667/227678/1	30/11/2018	CP00009809	30/11/2018	V6950	30/11/2018
Commuation	1573248	1573248	0	Paid	PEWC/2019/027667/227678/1	30/11/2018	CP00009610	30/11/2018	V6951	30/11/2018

- 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:
 - 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.

The screenshot displays a web application interface with a sidebar menu on the left and a main content area. The sidebar menu includes items like 'User Manuals', 'eSanctions', 'Masters', 'Pension', 'Users', 'Failed Transaction', 'Sanctions', 'Admin Master', 'NER Corrections', 'SNA SPARSH', 'Transfer Entry', 'Review Sanctions', 'Bank Reconciliation', 'Monthly Accounts Processing', 'Employee Info. System', 'Reports', 'Masters', 'Bank', and 'Register/ Track Issue'. The main content area is titled 'Payment Details' and contains a table with the following data:

Bill Type	Gross Amount	Net Amount	Recovery Amount	Bill Status	Sanction No	Sanction Date	Bill No	Bill Date	Voucher No	Voucher Date
Gratuity	1428800	1428800	0	paid	PEVG/2019/027667/227679/1	30/11/2018	CP00000809	30/11/2018	V8930	30/11/2018
Commutation	1573248	1573248	0	paid	PENC/2019/027667/227679/1	30/11/2018	CP00000810	30/11/2018	V6951	30/11/2018

Below the table, there are sections for 'Revision Case' (No Revision Available) and 'DSC Revert History' (No Records Available). A 'Hide ePPO' button is present. At the bottom, there are two radio buttons: one for 'It is certified that the DSC reversion on above e-PPO is to be reverted' (unchecked) and one for 'It is certified that e-ppo need to be re-uploaded' (checked). Below these are 'Forward To DH' and 'Reupload e-PPO' buttons.

- If PAO Selects the button:
 - 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

Payment Details

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	Fail	PENG/2019/027667/227678/1	30/11/2018	CP00000809	30/11/2018	V5920	30/11/2018
Commutation	1573248	1573248	0	Fail	PENG/2019/027667/227678/1	30/11/2018	CP00000810	30/11/2018	V5921	30/11/2018

Revision Case

No Revision Available

DSC Revert History

No Records Available

Indic PPO

It is certified that the DSC reversion on above e-PPO is to be reverted It is certified that e-ppo need to be re-uploaded

Remarks:

[Forward To DH](#) [Reupload e-PPO](#)

- Thereafter, PAO will get the following message once pension case is forwarded to DH

Public Financial Management System-PFMS
 D/o Controller General of Accounts, Ministry of Finance

Welcome: MANOJ KUMAR SHARMA
 User Type: PAO
 Financial Year: 2023-2024

10:24:30 AM

e-PPO DSC Revert

PPO - 276671800382 Initiated For DSC Revert and forward to DH for Processing

CPAO Return Cases

PPO No:

[Reset](#)

Accept/Reject DSC Revert Process

PPO No:

Note:- Use This Frame To Take Action Regarding DSC Reversion After Approval By DH And AAO

[Reset](#)

Process at DH Login

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

The screenshot shows the PFMS interface with a navigation menu on the left and a main content area. The main content area displays a red error message: "An Error has occurred in this page. Please contact administrator". Below the error message, there is a table titled "Agency Bank Account Validation Status". The table has a header row and several data rows. The data rows include columns for "Create Pensioner", "Manage Pensioner", "EOP Manage Pension", "Sanction", "e-PPO", "Browser Neutral DSC", "Revision Cases", "JAVA Based", "Utilities", "DSC ePPO List", and "ePPO returned by CPAO".

- Select the pensioner from the dropdown list

The screenshot shows the PFMS interface with a navigation menu on the left and a main content area. The main content area displays the "e-PPO DSC Revert" process. A dropdown menu is open, showing a list of pensioners to be selected. The list includes the following entries:

PPO No.	Name
331952000898	(Mary Alice T)
331952100341	(ALMAN SAM)
433351801824	(Mangat Ram)
331952000869	(Satyakumar Dixit)
331951700533	(DILIPKUMAR KUNDU)

- 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	1428900	1428900	0	Paid	PEHG/2019/027667/227678/1	30/11/2018	CP0000909	30/11/2018	V6950	30/11/2018
Commutation	1573248	1573248	0	Paid	PEHC/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.

The screenshot shows a web form with a 'hide ePPO' button at the top right. Below it is a red text notification: 'It is certified that the DSC reversion on above e-PPO is to be reverted.' The form is divided into sections: 'Bill Details' with 'Payment made by PAO through Sanction module' (radio buttons for Yes and No, with No selected), and 'Recovered Challan Details' with 'Recovery made by PAO' (radio buttons for Yes and No, with No selected). The main question is 'Physical PPO booklet (Disburser Portion) is available at PAO office' with radio buttons for Yes and No, where Yes is selected. Below this is a 'Remarks' text box, currently empty. At the bottom, there are fields for 'PAO Initiated Remarks' (containing 'Approved...') and 'PAO Rejected Remarks'. A 'Forward To AAO' button is located at the bottom center. The footer contains links for 'About Us', 'Site Map', 'Privacy Policy', 'Contact Us', and copyright information for '©2009 Public Financial Management System, All Rights Reserved.'

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

This screenshot is identical to the one above, but the radio button for 'No' is selected for the question 'Physical PPO booklet (Disburser Portion) is available at PAO office'. The 'Remarks' text box is still empty. The rest of the form, including the 'Forward To AAO' button and footer, remains the same.

- 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)?

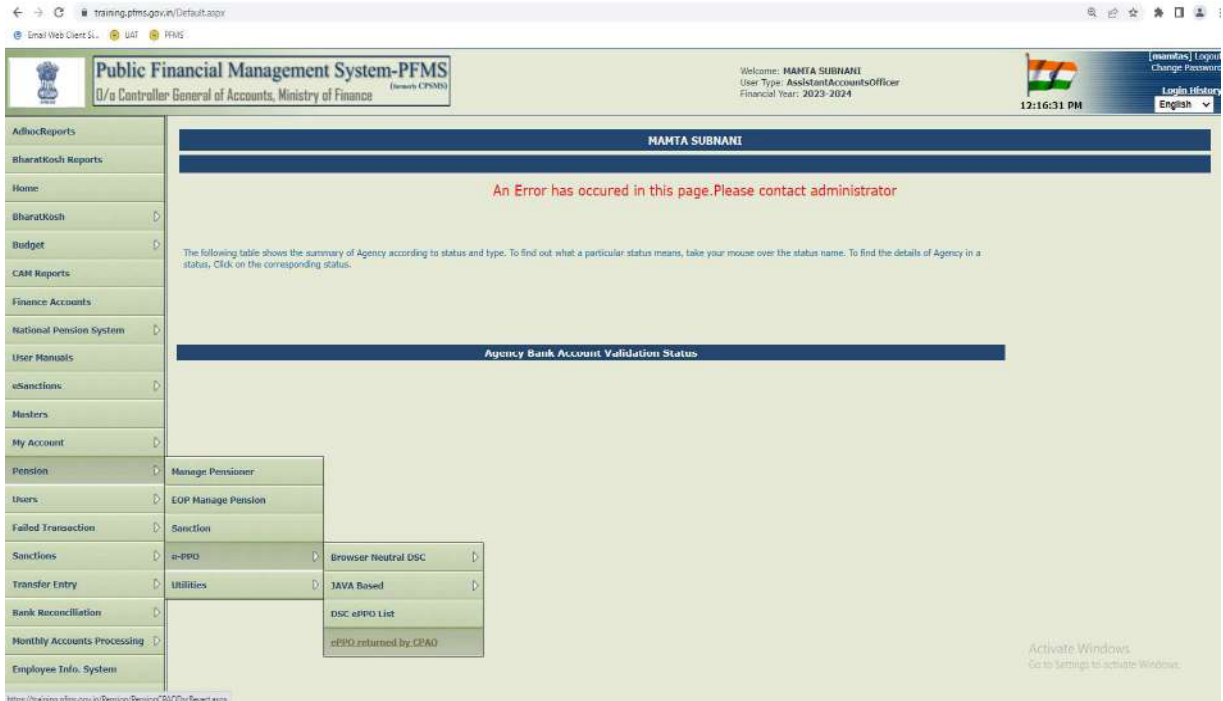


- Thereafter, the following message will be displayed to DH.

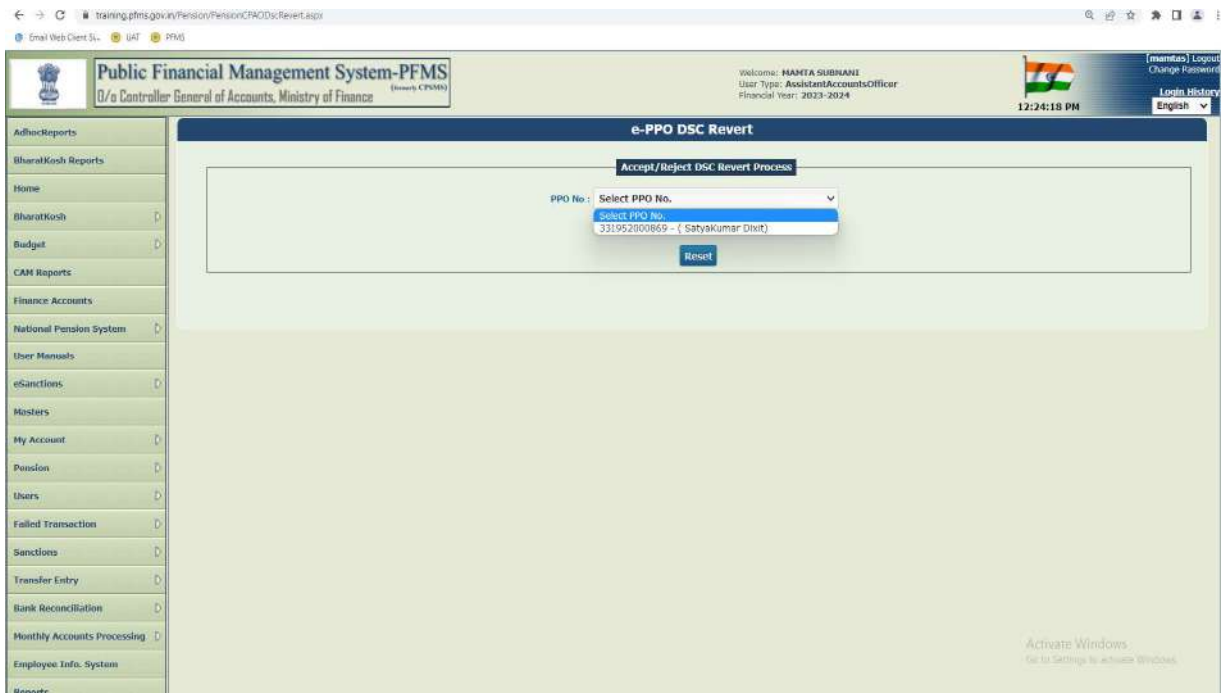


Process at AAO Login

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



- AAO User will select Pensioner PPO Number from dropdown



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

Pensioner/Family Pensioner Details										
Pensioner Name : Hemant Kumar Chauhan				File No : 1720			PAN : SARUPC6870A			
Pension Class : Superannuation Pension				Date of Retirement : 30/11/2018						
Return Reason of CPAO : Joint photograph, signature of the pensioner, family pensioner details missing or blank ePPO generated										
Payment Details										
Bill Type	Gross Amount	Net Amount	Recovery Amount	Bill Status	Sanction No	Sanction Date	Bill No	Bill Date	Voucher No	Voucher Date
Gratuity	1428800	1428800	0	Paid	PENG/2019/017667/227678/1	30/11/2018	CP00000809	30/11/2018	V6950	30/11/2018
Commutation	1573248	1573248	0	Paid	PENG/2019/017667/227678/1	30/11/2018	CP00000810	30/11/2018	V6951	30/11/2018
Revision Case										
No Records Available										
DSC Revert History										
No Records Available										
Hide ePPO										
<input type="checkbox"/> It is certified that the DSC reversion on above e-PPO is to be reverted										

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

Hide ePPO										
<input checked="" type="checkbox"/> It is certified that the DSC reversion on above e-PPO is to be reverted										
Bill Details										
Payment made by PAO through Sanction module <input type="radio"/> Yes <input checked="" type="radio"/> No										
Recovered Challan Details										
Recovery made by PAO <input type="radio"/> Yes <input checked="" type="radio"/> No										
Physical PPO booklet (Disburser Portion) is available at PAO office <input checked="" type="radio"/> Yes <input type="radio"/> No										
Remarks: *										
PAO Initiated Remarks : Approved....										
DH Remarks : Approved....										
Forwarded To PAO										

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

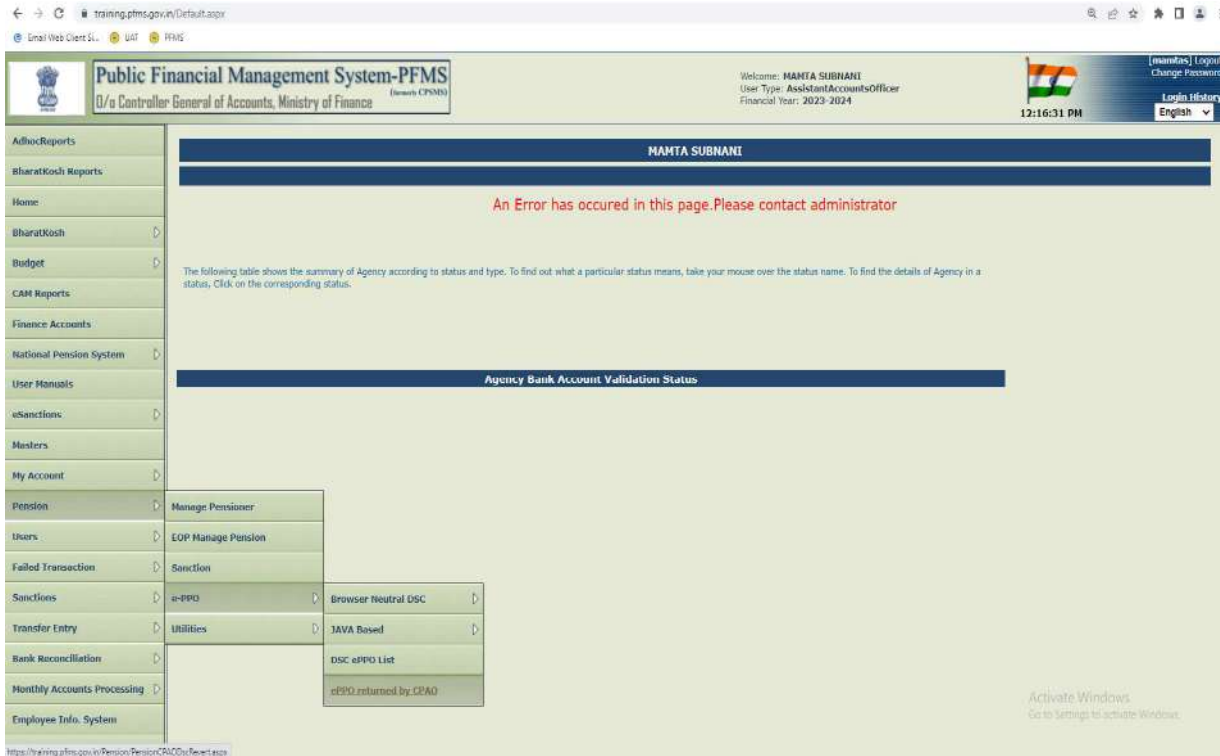
training.pfms.gov.in says

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



Process at PAO Login

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



- PAO User will select Pensioner PPO Number from dropdown

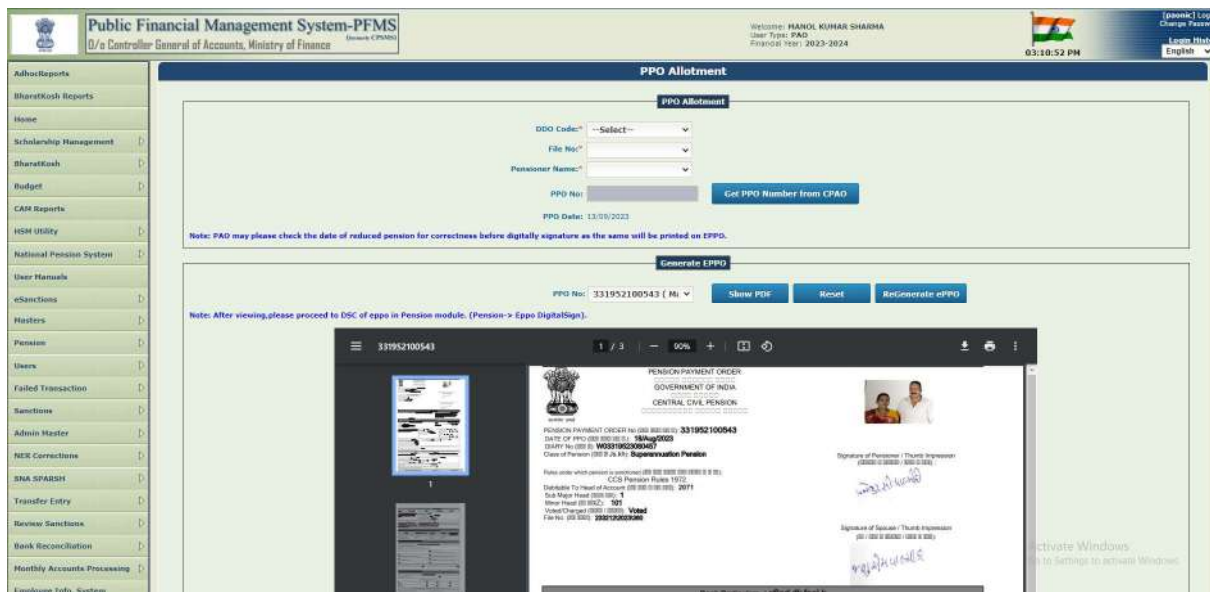
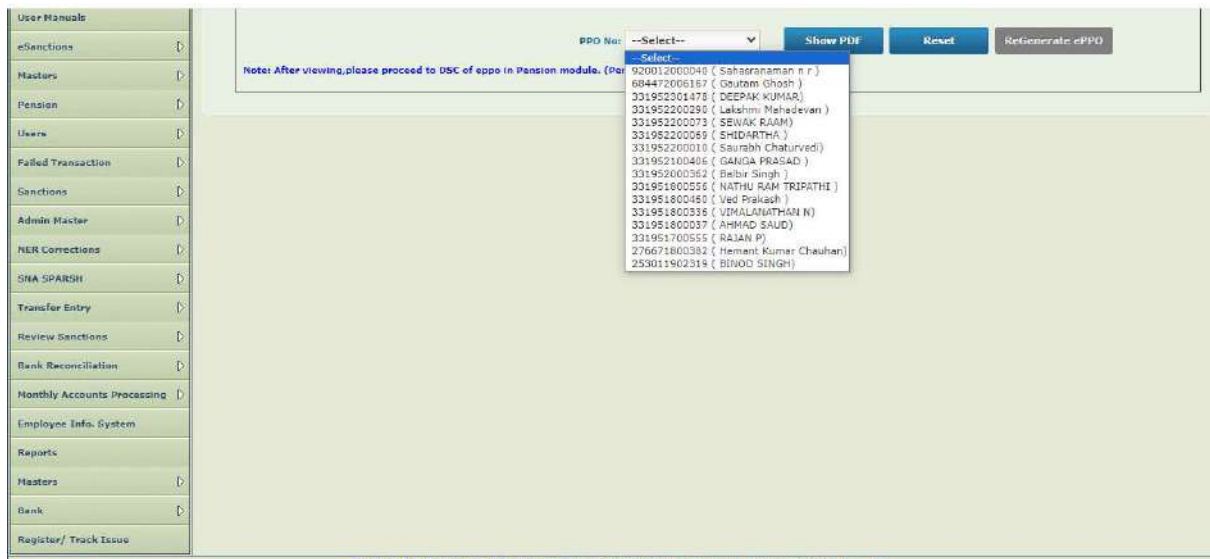


- PAO User Click on View ePPO. PAO User has to view pensioner details, payment details and recovery details, if any and Accept/Reject DSC Revert Process.

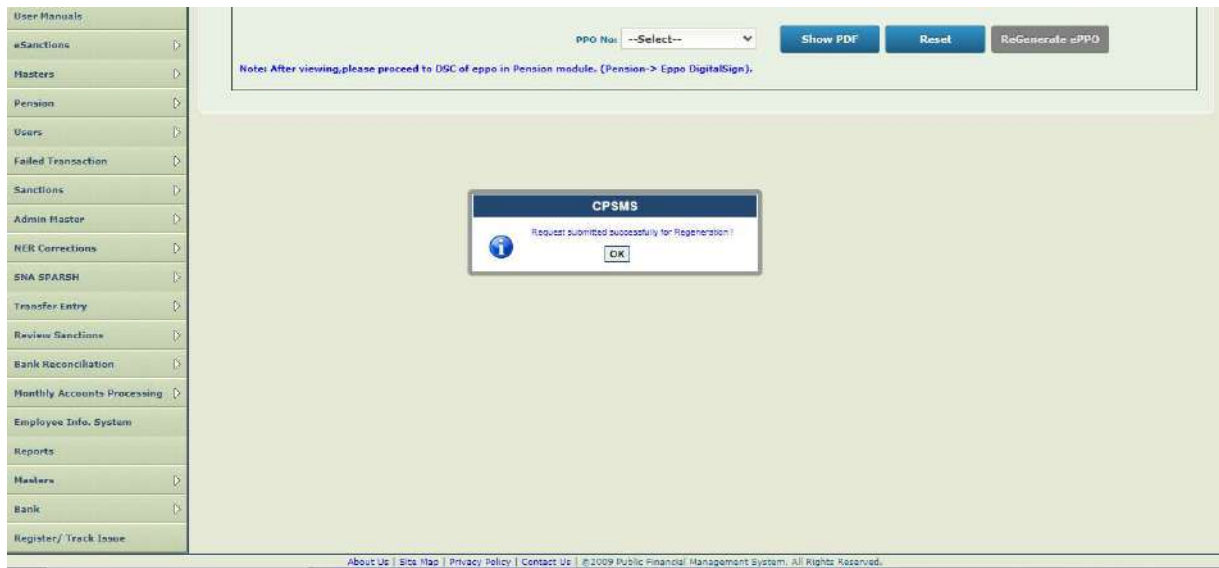
- Click on Change Financial Change, if DSC Revert is required With/Without financial Change

- 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.

Public Financial Management System-PFMS
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Welcome: MANOJ KUMAR SHARMA
User Type: PAO
Financial Year: 2023-2024

Case Return To PAO Login

Pensioner Name: Hemant Kumar Cha

Pensioner Name	PPONumber	DDO Code	PAN No
Hemant Kumar Chauhan	276671800382	233212	AAUPC6870A

- PAO can select the action required.

Public Financial Management System-PFMS
D/o Controller General of Accounts, Ministry of Finance

Welcome: MANOJ KUMAR SHARMA
User Type: PAO
Financial Year: 2023-2024

Case Return To PAO Login

Pensioner Name: Hemant Kumar Cha

Pensioner Name	PPONumber	DDO Code	PAN No
Hemant Kumar Chauhan	276671800382	233212	AAUPC6870A

Case Return To PAO Login

Please select the appropriate option?

Case Return to PAO Login Reset No Action

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