

Ministry of Finance
Department of Expenditure
Controller General of
Accounts GIFMIS (PFMS
DIVISION)

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Dated:29 July 2025

Office Memorandum


Subject: Uploading of Revised User Guide on TSA and Hybrid TSA Modules – UI/UX Changes

In compliance with the directions of Secretary (Expenditure) the entire UI/UX for Hybrid TSA on PFMS portal has been redesigned and upgraded, with a focus on simplification, standardization, and improved operational navigation for Maker and Checker roles at the Child Agency and Funding Agency levels. These changes have been implemented without altering the core business logic or validation architecture of the Hybrid TSA module.

2. The user interface and user experience (UI/UX) of the TSA and Hybrid TSA modules in the PFMS portal have been significantly enhanced to streamline workflows and improve ease of use. The updated interface incorporates simplified navigation, intuitive layouts, and consolidated dashboards for better transaction handling.

3. To aid smooth transition and user onboarding a comprehensive User Guide detailing all enhancements is available on the CGA website under the TSA/Hybrid TSA Guidelines section for easy access by stakeholders

4. All Ministries, Departments, Program Divisions, PAOs, and Implementing Agencies using the Hybrid TSA module are requested to widely disseminate this information to all concerned field units, thereby facilitating seamless adoption of the upgraded interface.


(Anupam Raj)

Dy. Controller General of Accounts
GIFMIS

To:

1. All Pr. CCAs/CCAs/CAS with independent charge with a request to get the OM circulated to concerned Program Divisions and Agencies.
2. Sr.AO (GIFMIS) to upload a copy on CGA's website

Public Financial Management System

(PFMS- GIFMIS)

TSA HYBRID Module

**Standard Operating Procedure for Making and
Approving Claims at Child Agency and Funding
Agency Level**

July 2025

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1 Creating a New Claim by Child Agency Maker

Following are the steps to be followed for making claims at Agency Maker Level:

Step 1: Accessing the Dashboard

- a. Child Agency Maker must log in to the PFMS portal (<https://pfms.nic.in/>) and navigate to **TSA Hybrid Dashboard** by clicking on collapsed menu icon at the left side.



From the dashboard, select the **Create New Claim** option or click on **Create New Claim** tab from the Menu Bar. The **Create New Claim** interface consists of four main sections:

- i. Scheme Details
- ii. Claim Details
- iii. Vendor Details
- iv. Deduction Details

Upon selection, the following screen will appear.

The screenshot shows the 'Create New Claim' form. The 'Scheme Details' section is expanded, showing four dropdown menus: 'Scheme Name*' (with a '--Select Scheme--' option), 'Project Name' (with a '--Select--' option), 'Bank Account Number*' (with a dropdown arrow), and 'Assignment*' (with a '--Select--' option). Below these are three more sections: 'Claim Details' with 'Claim Order Number' (text input) and 'Claim Amount (in INR)*' (text input with '0' entered); 'Vendor Details'; and 'Deduction Details'.

Step 2: Entering Scheme Details

- Select the appropriate **Scheme**, **Project** (if applicable), and **Bank Account Number** from the dropdown menus.

The screenshot shows the 'Create New Claim' form with selections made. 'Scheme Name*' is set to '1261-Member of Parliament Local Area Development Scheme (MPLAD)'. 'Bank Account Number*' is set to '1277889900'. The 'Assignment*' dropdown is open, showing a list of assignments with columns for Transaction ID, Limit Assigned, and Available Balance. The first assignment is '5082001069311 | 500000.00 | 54177.00'.

- Based on your selection, the corresponding **Assignment List** will be displayed.
- Choose the desired **Assignment**. The **Assignment Grid** will then be shown, including:

- Transaction ID
- Limit Assigned
- Available Balance

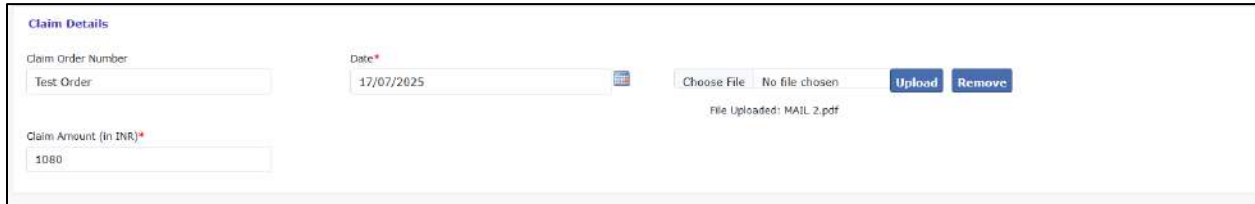
- Remove button (X) may be used to delete the assignment from the grid.

The screenshot shows the 'Create New Claim' form with the 'Assignment Grid' table displayed. The table has four columns: 'Transaction ID', 'Limit Assigned', 'Available Balance', and 'Remove'. The first row contains the data: Transaction ID 5082001069311, Limit Assigned 500000, Available Balance 54177, and a red X button in the Remove column.

Transaction ID	Limit Assigned	Available Balance	Remove
5082001069311	500000	54177	X

Step 3: Entering Claim Details

- a. Manually enter the Claim Order Number. Once entered:
 - A field to upload the **Claim Order Document** will appear.
 - **Date** field will also be enabled. Upload the document and enter the appropriate date.
- b. Enter the **Claim Amount**.



The screenshot shows the 'Claim Details' form. It includes a 'Claim Order Number' field with the text 'Test Order'. To its right is a 'Date*' field with the date '17/07/2025'. Further right is a file upload section with a 'Choose File' button, the text 'No file chosen', and 'Upload' and 'Remove' buttons. Below the file upload section, it says 'File Uploaded: MAIL 2.pdf'. At the bottom, there is a 'Claim Amount (in INR)*' field with the value '1080'.

Step 4: Entering Vendor Details

- a. Input vendor details. You can add one or multiple vendors (vendors must already be mapped in the system).



The screenshot shows the 'Vendor Details' form. It has two radio buttons: 'Individual Payment' (selected) and 'Bulk Payment'. Below them is a 'Select Vendor*' dropdown menu. To the right of the dropdown are 'Select Vendor' and 'Add Vendor' buttons.

You may also upload vendor details using a pre-prepared Excel file (useful for bulk payments such as salary disbursements).

For Single/Multiple Vendor Payments:

- i. Click on **Individual Payment**.
- ii. Add one or more vendors by selecting them from the dropdown.
- iii. Click on **Search** Hyperlink. List of Vendors will appear with its vendor code. User can search the Vendors by Vendor Name or Vendor Account Number or Vendor Unique Code. Select the vendor.

Transaction ID: 5082001069311 | 500000.00 | 51782.00

Vendor Name: Vendor Account Number: Vendor Unique Code: Search

Select

- [15234832]VENDORTSATEST2 [V2443800000001]
- [15238258]GURAJ THAKUR [V2748200000018]
- [15264572]VIKASH BH [VAD0800017841]
- [15264572]VIKASH BH [VAD0800017841]
- [15272832]MUKESH KUMAR [V2749000000001]
- [15533327]REEMA SINGH [VADLSD00046675]
- [15533332]REEMA SINGH [VADLSD00046676]
- [15533525]JIN LAISHRUP [VADLSD00046677]
- [15533530]DEEPAK KUMAR [VADLSD00046678]
- [15533531]ASHUTOSH YADAV [VADLSD00046679]

iv. Select the vendor.

Vendor Details

Individual Payment Bulk Payment

Select Vendor* VENDORTSATEST2 | V2443800000001 Select Vendor Add Vendor

v. Click on **Add vendor**. A grid will display the vendor's auto-populated details:

- Vendor Name
- Account Number
- IFSC Code

Vendor Details

Individual Payment Bulk Payment

Select Vendor* Select Vendor Add Vendor

Vendor Name	Account Number	IFSC Code	Components	Gross Amount	Remove
VENDORTSATEST2 V2443800000001	561561565545	UTIB0000053	Select		✖

vi. Select the Component from the Component list against which payment is to be made to vendors.

The screenshot shows the 'Vendor Details' section of a form. A dropdown menu for 'Components' is open, displaying a list of options including [1]Test, [01]Drinking Water Facility, [15]Administrative Expenses, [02]Education, [10]Sports, [11]Works relating to Animal Husbandry, Dairy and Fisheries, [03]Electricity Facility, [12]Works relating to Agriculture, [13]Works relating to Cluster Development for Handloom Weavers, [14]Works relating to Urban development, [04]Health and Family welfare, [05]Irrigation Facilities, [06]Non-Conventional Energy Sources, [07]Other Public Facilities, [08]Railways, Roads, Pathways and Bridges, and [09]Sanitation and Public Health. The 'Claim Amount (in INR)' is set to 1080. The 'Vendor Name' is VIKASH JHA | VABRBU00017841.

vii. Enter the Gross Amount.

The screenshot shows the 'Vendor Details' section of a form. The 'Gross Amount' field is set to 1000. The 'Components' dropdown is set to [1]Test. The 'Vendor Name' is VIKASH JHA | VABRBU00017841. The 'Account Number' is 215487896 and the 'IFSC Code' is HDFC0009937.

To add multiple vendors, user can select the vendors from the dropdown and add them. Remove button (X) may be used to delete the vendor from the list.

The screenshot shows the 'Vendor Details' section of a form. The 'Gross Amount' field is set to 1000. The 'Components' dropdown is set to [1]Test. The 'Vendor Name' is VIKASH JHA | VABRBU00017841. The 'Account Number' is 215487896 and the 'IFSC Code' is HDFC0009937. Below the form, there is a table with two rows of vendor data:

Vendor Name	Account Number	IFSC Code	Components	Gross Amount	Remove
VIKASH JHA VABRBU00017841	215487896	HDFC0009937	[1]Test	1000	X
VIKASH JHA VABRBU0005003	660977559	HDFC0005523	[15]Administrative Expenses	80	X

Note: The total gross amount of all vendors must be equal to the overall Claim Amount.

For Bulk Payments: If user want to add many vendors at once:

i. Select **Bulk Payment** radio button option.

Vendor Details

☐ Individual Payment ☒ Bulk Payment

Customization Name

FY 2025-26 Excel payment[Self]

ii. A list of pre-uploaded Excel sheets (excel based bulk customization file) will be displayed.

Note: Maker has to create Excel Based Bulk Customization file by following Path:
Masters>Bulk Customization>Bulk Customization Using Excel

Vendor Details

☐ Individual Payment ☒ Bulk Payment

Customization Name

FY 2025-26 Excel payment[Self]

Report Details

1 of 1 Find | Next

Vendor Details for Bulk Upload : "FY 2025-26 Excel payment[Self]"

S. No.	Vendor Name	Vendor Code	Bank Name	IFSC Code	Bank Account No.	S. No.	Deduction Code	Deduction Description	Component Code	Component Name	Transaction Amount (In Rs.)	Net Payable (In Rs.)
1	Vendor7418e2	V244380000001	AXIS BANK	UTIB0000863	561561365545	1	TDS	TDS			80.00	
						2	IT	IncomeTax			50.00	
						3	GP	Gross Payment	1	Test	200.00	110.00
2	Vikas19	VABRGAC0058003	HDFC BANK LTD	HDFC0009523	660927590	1	TDS	TDS			20.00	
						2	IT	IncomeTax			30.00	
						3	GP	Gross Payment	1	Test	200.00	150.00

iii. Choose the required excel sheet (excel based bulk customization file) to auto-populate prefilled vendor details in a grid.

Note: Deduction details are automatically populated from the uploaded Excel file and displayed under the **Report Details** section. This replaces the manual **Deduction** section.

Step 5: Submitting the Claim

- In case of Individual Payment, the Deduction Details section will auto-populate based on the vendors selected. User can add the required deductions in the table and can select more than one category of deduction by clicking on “+” button.

Deduction Details

☒ Yes ☐ No

Vendor Name	Gross Amount	Deductions			Net Amount	Remove
		Category	Amount	Add		
YASH JHA YABRBU00017641	1000	Contributory Pension Scheme	10	+	990	✖
VIKAS19 VABRGAC0058003	80	Accommodation Recovery	8	+	72	✖

- Click **Save as Draft** if you wish to save the claim for submission at a later time. A confirmation popup will confirm the claim is saved as draft.



- c. To submit the claim, click **Submit**. A confirmation popup will appear—click **OK** to proceed.
- d. Upon successful submission, a final confirmation popup will be displayed. The claim will then be available for the Agency Checker to approve.

Claim Amount (in INR)*
1080

training.pfms.gov.in says
Do you want to submit the claim for Rs. 1080.
OK **Cancel**

Vendor Details

☒ Individual Payment ☐ Bulk Payment

Select Vendor*

Enter Vendor Name **Add Vendor**

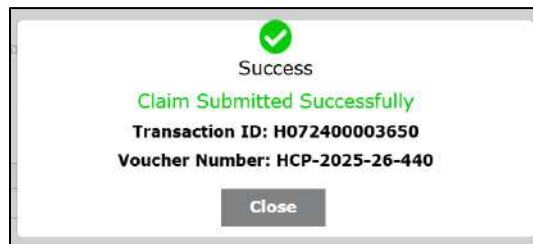
Vendor Name	Account Number	IFSC Code	Components	Gross Amount	Remove
VIKASH JHA VABRBU0017841	215487896	HDFC0000837	[1]Test Select	1000	X
VIKAS19 VABRGA00050002	660977559	HDFC0005523	[15]Administrative Expenses Select	80	X

Deduction Details

☒ Yes ☐ No

Vendor Name	Gross Amount	Deductions			Net Amount	Remove
		Category	Amount	Add		
VIKASH JHA VABRBU0017841	1000	Contributory Pension Scheme	10	+	990	X
VIKAS19 VABRGA00050002	80	Accommodation Recovery	8	+	72	X

Save As Draft **Submit** **Reset**



2 View Draft and Submitted Claims - Child Agency Maker

1. Accessing and Submitting Draft Claims

This feature allows the Child Agency Maker to view, edit, and submit previously saved draft claims.

Steps:

- Navigate to the **Saved as Draft Claims** option on dashboard or click on **View Draft Claim** tab from the Menu Bar.
- The table contains the list of all saved draft claims will be appeared on the screen automatically.
- In case, there is a requirement to check the saved draft claims against specific scheme, user can select **Scheme Name** and **Project Name** if applicable.
- The Status field will be pre-set to **Saved as Draft**.
- Click on **Search** button.
- A table will appear displaying all draft claims, including the Transaction Id, Claim Amount, Date and Submitted By.

The screenshot shows the 'View Draft Claim' tab selected in the top navigation bar. Below the navigation bar, there are filter fields for 'Scheme Name' (set to '1261-Member of Parliament Local Area Development Scheme (MPLAD)'), 'Project Name' (set to '--Select--'), and 'Status' (set to 'Saved As Draft'). A 'Search' button is located below the filters. Below the search area, a table displays a list of draft claims with the following columns: Sr.No., CPSMS Transaction Id, Amount, Date, and Submitted By.

Sr.No.	CPSMS Transaction Id	Amount	Date	Submitted By
1	H072400003536	15	17/07/2025	Test
2	H072400003401	2300	17/07/2025	Nik
3	H072400003466	2133	17/07/2025	Nik
4	H072400003463	1120	17/07/2025	Nik
5	H072400003874	1680	16/07/2025	Nik
6	H072400002861	1150	16/07/2025	Nik
7	H072400002848	10	16/07/2025	Test

- Click on the hyperlink of the desired **CPSMS transaction ID** to open it.

The screenshot displays the 'Maker and Checker Process' interface for the TSA Hybrid system. It features a top navigation bar with tabs: 'Create New Claim', 'View Draft Claim', 'View Submitted Claim', 'View Approved Claim', and 'View Returned Claim'. The main content area is divided into several sections:

- Scheme Details:** Includes dropdowns for 'Scheme Name' (1251-Member of Parliament Local Area Development Scheme (MPLAD)) and 'Project Name' (---Select---). It also has fields for 'Bank Account Number' (1277889000) and 'Assignment' (---Select---).
- Transaction Table:** A table with columns: Transaction ID, Limit Assigned, Available Balance, and Remove. The first row shows Transaction ID: 898355149311, Limit Assigned: 900000, Available Balance: 91262, and a Remove button with a red X icon.
- Claim Details:** Includes 'Claims Order Number' (19), 'Date' (17/07/2025), and 'Claims Amount (in INR)' (2300). There is a file upload section with 'Choose File', 'No file chosen', and 'Upload'/'Remove' buttons.
- Vendor Details:** A section for vendor information.
- Deduction Details:** A section for deduction information.
- Transaction Details (For Office Record):** Includes 'Transaction ID' (H072490002491), 'Voucher No.' (HCP-2025-26-411), 'Submitted By' (Nik Jha), and 'Date' (17/07/2025).

- h. The Claim details will appear along with an additional section: Transaction Details (For Office Records), displaying the Transaction ID and Voucher Number.
- i. The user can either make changes or submit the claim directly. The same Transaction ID and Voucher Number will be retained upon submission.

2. Viewing Submitted Claims

This function enables the Agency Maker to view all claims that have been submitted to the Child Agency Checker.

Steps:

- a. Navigate to the Submitted claim option on dashboard or click on **View Submitted Claim** tab from the Menu Bar.
- b. The table containing the list of all Submitted Claims will be appeared on the screen automatically.
- c. In case, there is a requirement to check the submitted claim against specific scheme, user can select **Scheme Name** and **Project Name** if applicable.
- d. The Status field will be pre-set to **Submitted**.
- e. Click on **Search tab** to view the list of submitted claims under the Scheme.

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

Welcome: **Nik Jha**
 User Type: **AGENCYDO**
 Agency: **TSA Hybrid_7**
 Agency Unique Code: **DLSD00002835**
 Financial Year: **2025-2026**

10.50000028350311
 Change Pass
 Login In
 English

Create New Claim View Draft Claim View Submitted Claim View Approved Claim View Returned Claim

Scheme Name* 1261-Member of Parliament Local Area Development Scheme (MPLAD) Project Name --Select--

Status Submitted

Search

Sr.No.	CPSMS Transaction Id	Amount	Date	Submitted By
1	H072400002877	2000	16/07/2025	Test
2	H072400002831	1995	16/07/2025	Nik
3	H072400002812	1980	16/07/2025	Nik
4	H072400002806	1400	16/07/2025	Nik
5	H072400002799	1000	16/07/2025	Test
6	H072400002729	1250	16/07/2025	Test
7	H072400002694	400	15/07/2025	Nik
8	H072400002690	300	15/07/2025	Nik

3. Viewing Approved Claims

This feature allows the Child Agency Maker to view claims approved by the Child Agency Checker.

Steps:

- Navigate to the **Approved claim** option on dashboard or click on **View Approved Claim** tab from the Menu Bar.
- The table containing the list of all Approved Claims will be appeared on the screen automatically.
- There is a functionality to check the approved claim against specific scheme, user can select **Scheme Name** and **Project Name** if applicable.
- The Status field will be pre-set to **Approved by Checker**.
- Click on **Search** tab to view the list of approved claims under that Scheme.

Create New Claim View Draft Claim View Submitted Claim View Approved Claim View Returned Claim

Scheme Name* 1261-Member of Parliament Local Area Development Scheme (MPLAD) Project Name --Select--

Status Approved by Checker

Search

Sr.No.	CPSMS Transaction Id	Amount	Date	Submitted By
1	H072400002837	14000	16/07/2025	Test
2	H072400002833	400	16/07/2025	Test
3	H072400002824	200	16/07/2025	Test
4	H072400002794	12	15/07/2025	Nik
5	H072400002696	50	15/07/2025	Nik
6	H072400002691	40	15/07/2025	Nik
7	H072400002680	100	15/07/2025	Nik
8	H072400002626	2100	11/07/2025	Test

4. Viewing Returned Claims

This functionality is used by Agency Maker to edit the claims retuned by Agency Checker. User can make necessary changes and re-submit to the Agency Checker for approval.

Steps:

- Navigate to the **Claim Returned by Checker** option on dashboard or click on **View Returned Claim** tab from the Menu Bar.
- The table containing the list of all Returned Claims will be appeared on the screen automatically. The Status field will be pre-set to Returned by Checker. Click on **Search** tab to view the list of returned claims under that Scheme.

Home Create New Claim View Draft Claim View Submitted Claim View Approved Claim View Returned Claim					
Scheme Name* 1261-Member of Parliament Local Area Development Scheme (MPLAD)		Project Name --Select--			
Status Returned by Checker		<input type="button" value="Search"/>			
Sr.No.	Transaction Id	Amount	Date	Submitted By	
1	H072400003815	40	23/07/2025	Test	
2	H072400003575	50	18/07/2025	Nil	
3	H072400003479	1350	17/07/2025	Nil	
4	H072400002877	2000	18/07/2025	Test	
5	H072400002866	1440	16/07/2025	Nil	
6	H072400003856	1200	18/07/2025	Nil	

- User can click on Transaction ID hyperlink and check, edit and resubmit the returned claim against specific scheme to the Checker.

Home Create New Claim View Draft Claim View Submitted Claim View Approved Claim View Returned Claim			
Scheme Details			
Scheme Name* 1261-Member of Parliament Local Area Development Scheme (MPLAD)		Project Name --Select--	
Bank Account Number* 1277889900		Assignment* --Select--	
Transaction ID	Limit Assigned	Available Balance	Remove
568206100511	50000	52797	<input type="button" value="X"/>
Claim Details			
Vendor Details			
Deduction Details			
Transaction Details (For Office Record)			
Transaction ID: H072400003815		Voucher No.: HCP-2025-26-443	
Submitted By: Test Maker		Date: 23/07/2025	
Remarks for Returning the Claim: Testing Purpits			

3 Claim Approval Process at Child Agency Checker Level

1. Accessing the Dashboard

- a. Child Agency Checker must log in to the PFMS portal (<https://pfms.nic.in/>) and navigate to **TSA Hybrid Dashboard** by clicking on collapsed menu icon at the left side.



2. Approving/Returning Claim by Agency Checker

- a. Navigate to the **Pending for Approval** option on dashboard or click on **Pending for Approval** tab from the Menu Bar.
- b. The table containing the list of all pending for approval claims will be appeared on the screen automatically.

Sr.No.	CPSMS Transaction Id	Amount	Date	Submitted By
1	H072400002831	1995	16/07/2025	Nk
2	H072400002832	1980	16/07/2025	Nk
3	H072400002808	1400	16/07/2025	Nk
4	H072400002799	1600	16/07/2025	Test
5	H072400002729	1250	16/07/2025	Test
6	H072400002684	400	15/07/2025	Nk
7	H072400002690	300	15/07/2025	Nk
8	H072400002682	200	15/07/2025	Nk

- c. In case, there is a requirement to check the pending for approval claim against specific scheme, user can select **Scheme Name** and **Project Name** if applicable. The Status field will be pre-set to **Pending for Approval**. Click on **Search** button. A table will appear displaying all pending for approval claims, including the Transaction Id, Claim Amount, Date and Submitted By.

Transaction ID	Limit Assigned	Available Balance
508200199011	500000	50001

- d. Details of claim will appear after clicking on the **Transaction ID** hyperlink. The four pre-filled standard sections of the claims will appear along with addition section **Transaction Details (For Office Record)**, displaying the Submitted Claim Transaction ID and Voucher Number.
- e. Agency Checker user verifies all details and selects either
- Approve** button - A confirmation message will appear. To proceed with Digital Signature right away, user will click on **Yes** button and will automatically

User Guide – Maker and Checker Process - TSA Hybrid
 redirect to the apply Digital Signature page. On clicking **No** button user can keep the claim for later DSC application.



- ii. **Return Button** - The claim will be sent back to the Agency Maker for editing and resubmission.

3. Applying Digital Signature (DSC) by Agency Checker

- a. Navigate to the **Pending for Digital Signature** option on dashboard or click on **Pending for Digital Signature** tab from the Menu Bar.
- b. The table containing the list of all claims pending for digital signature will be appeared on the screen automatically.

The screenshot shows the PFMS interface with a table of claims pending for digital signature. The table has columns for Sl. No., Scheme Name, Transaction ID, Amount, and Action. The data is as follows:

Sl. No.	Scheme Name	Transaction ID	Amount	Action
1	PM-1000, 1000-1000-1000-1000-1000	H072400002778	1000	Apply DSC
2	PM-1000, 1000-1000-1000-1000-1000	H072400002779	1000	Apply DSC
3	PM-1000, 1000-1000-1000-1000-1000	H072400002780	1000	Apply DSC
4	PM-1000, 1000-1000-1000-1000-1000	H072400002781	1000	Apply DSC
5	PM-1000, 1000-1000-1000-1000-1000	H072400002782	1000	Apply DSC
6	PM-1000, 1000-1000-1000-1000-1000	H072400002783	1000	Apply DSC
7	PM-1000, 1000-1000-1000-1000-1000	H072400002784	1000	Apply DSC
8	PM-1000, 1000-1000-1000-1000-1000	H072400002785	1000	Apply DSC
9	PM-1000, 1000-1000-1000-1000-1000	H072400002786	1000	Apply DSC
10	PM-1000, 1000-1000-1000-1000-1000	H072400002787	1000	Apply DSC
11	PM-1000, 1000-1000-1000-1000-1000	H072400002788	1000	Apply DSC
12	PM-1000, 1000-1000-1000-1000-1000	H072400002789	1000	Apply DSC
13	PM-1000, 1000-1000-1000-1000-1000	H072400002790	1000	Apply DSC
14	PM-1000, 1000-1000-1000-1000-1000	H072400002791	1000	Apply DSC
15	PM-1000, 1000-1000-1000-1000-1000	H072400002792	1000	Apply DSC
16	PM-1000, 1000-1000-1000-1000-1000	H072400002793	1000	Apply DSC
17	PM-1000, 1000-1000-1000-1000-1000	H072400002794	1000	Apply DSC
18	PM-1000, 1000-1000-1000-1000-1000	H072400002795	1000	Apply DSC
19	PM-1000, 1000-1000-1000-1000-1000	H072400002796	1000	Apply DSC
20	PM-1000, 1000-1000-1000-1000-1000	H072400002797	1000	Apply DSC
21	PM-1000, 1000-1000-1000-1000-1000	H072400002798	1000	Apply DSC
22	PM-1000, 1000-1000-1000-1000-1000	H072400002799	1000	Apply DSC
23	PM-1000, 1000-1000-1000-1000-1000	H072400002800	1000	Apply DSC
24	PM-1000, 1000-1000-1000-1000-1000	H072400002801	1000	Apply DSC
25	PM-1000, 1000-1000-1000-1000-1000	H072400002802	1000	Apply DSC
26	PM-1000, 1000-1000-1000-1000-1000	H072400002803	1000	Apply DSC
27	PM-1000, 1000-1000-1000-1000-1000	H072400002804	1000	Apply DSC
28	PM-1000, 1000-1000-1000-1000-1000	H072400002805	1000	Apply DSC
29	PM-1000, 1000-1000-1000-1000-1000	H072400002806	1000	Apply DSC
30	PM-1000, 1000-1000-1000-1000-1000	H072400002807	1000	Apply DSC
31	PM-1000, 1000-1000-1000-1000-1000	H072400002808	1000	Apply DSC
32	PM-1000, 1000-1000-1000-1000-1000	H072400002809	1000	Apply DSC
33	PM-1000, 1000-1000-1000-1000-1000	H072400002810	1000	Apply DSC
34	PM-1000, 1000-1000-1000-1000-1000	H072400002811	1000	Apply DSC
35	PM-1000, 1000-1000-1000-1000-1000	H072400002812	1000	Apply DSC
36	PM-1000, 1000-1000-1000-1000-1000	H072400002813	1000	Apply DSC
37	PM-1000, 1000-1000-1000-1000-1000	H072400002814	1000	Apply DSC
38	PM-1000, 1000-1000-1000-1000-1000	H072400002815	1000	Apply DSC
39	PM-1000, 1000-1000-1000-1000-1000	H072400002816	1000	Apply DSC
40	PM-1000, 1000-1000-1000-1000-1000	H072400002817	1000	Apply DSC
41	PM-1000, 1000-1000-1000-1000-1000	H072400002818	1000	Apply DSC
42	PM-1000, 1000-1000-1000-1000-1000	H072400002819	1000	Apply DSC
43	PM-1000, 1000-1000-1000-1000-1000	H072400002820	1000	Apply DSC
44	PM-1000, 1000-1000-1000-1000-1000	H072400002821	1000	Apply DSC
45	PM-1000, 1000-1000-1000-1000-1000	H072400002822	1000	Apply DSC
46	PM-1000, 1000-1000-1000-1000-1000	H072400002823	1000	Apply DSC
47	PM-1000, 1000-1000-1000-1000-1000	H072400002824	1000	Apply DSC
48	PM-1000, 1000-1000-1000-1000-1000	H072400002825	1000	Apply DSC
49	PM-1000, 1000-1000-1000-1000-1000	H072400002826	1000	Apply DSC
50	PM-1000, 1000-1000-1000-1000-1000	H072400002827	1000	Apply DSC

- c. In case, there is a requirement to check the claims pending for DSC against specific scheme, user can select **Scheme Name** and **Project Name** if applicable. User may also enter Payment Transaction ID to search specific claim file. Click on **Search** button. A table will appear displaying all claims pending for DSC, including the Scheme Name, Transaction ID, Amount and Action.
- d. Select one or more claims and click **Apply DSC** button.

- e. If the Agency Checker chooses to reject a transaction at this stage, the claim's transaction lifecycle will not be restored, and the assignment limit will be restored. A **valid reason** for rejection must be selected using dropdown

4. Viewing Approved and Digitally Signed Claims

- a. Navigate to the **Approved and Signed** option on dashboard or click on **Approved and Signed** tab from the Menu Bar.
- b. The table containing the list of all claims approved and digitally signed will be appeared on the screen automatically to view all digitally signed transactions.
- c. In case, there is a requirement to check the claims approved and signed against specific scheme, user can select **Scheme Name** and **Project Name** if applicable. User may also enter Payment Transaction ID to search specific claim file. Click on **Search** button. A table will appear displaying all approved and digitally signed claims, including the Scheme Name, Transaction ID, Amount and Date.
- d. User can also generate **PPA (Print Payment Advice)** by clicking on the Hyperlink provided on the Transaction ID.

Public Financial Management System-PFMS
O/e Controller General of Accounts, Ministry of Finance

Welcome: MR. Jha
User Type: AGENCYDA
Agency: TSA Hyderabad
Agency Unique Code: 015000002835
Financial Year: 2025-2026

Menu: pending for Approval | pending for Digital Signature | **Approved and signed** | Rejected Claims

Scheme Name: 1261-Member of Parliament Local Area Development Scheme (MPLADS)
Payment Transaction ID:

Scheme Name	Transaction ID	Amount	Date
MPLADS LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400002542	11	16/07/2025
MPLADS LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400002628	2100	16/07/2025
MPLADS LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400002762	44	16/07/2025
MPLADS LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400002214	10	16/07/2025
MPLADS LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400002282	1000	16/07/2025
MPLADS LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400002369	2100	16/07/2025
MPLADS LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400002318	1000	16/07/2025
MPLADS LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400002309	1000	16/07/2025
MPLADS LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400002390	1000	16/07/2025
MPLADS LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400001516	50	16/07/2025
MPLADS LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400001898	40	16/07/2025
MPLADS LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400001914	100	16/07/2025

5. Viewing Rejected Claims by Child Agency Checker

- a. Navigate to the **Rejected Claims** option on dashboard or click on **Rejected Claims** tab from the Menu Bar.
- b. The table containing the list of all rejected claims will be appeared on the screen automatically to view all claims rejected during the DSC process.
- c. In case, there is a requirement to check the rejected claims against specific scheme, user can select **Scheme Name** and **Project Name** if applicable. User may also enter Payment Transaction ID to search specific claim file. Click on **Search** button. A table will appear

User Guide – Maker and Checker Process - TSA Hybrid
displaying all rejected claims, including the Scheme Name, Transaction ID, Amount, Reason of Rejection and Date.

<div> <div></div> <div>Pending for Approval</div> <div>Pending for Digital Signature</div> <div>Approved and Signed</div> <div>Rejected Claims</div> </div>				
<div> <div>Scheme Name:</div> <div>1261-Member of Parliament Local Area Development Scheme (MPLADS)</div> </div> <div> <div>Payment Transaction ID:</div> <div></div> </div> <div> <div>Search</div> <div>Reset</div> </div>				
Scheme Name	Transaction ID	Amount	Reason of Rejection	Date
MPL LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400009817	46	Invalid Category	23/07/2025
MPL LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400003621	44	Invalid Category	26/07/2025
MPL LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400003569	26	Incorrect Amount Mentioned	16/07/2025
MPL LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400008883	60	Incorrect Amount Mentioned	16/07/2025
MPL LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400002866	1440	Incorrect Amount Mentioned	17/07/2025
MPL LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400002868	1460	Incorrect Amount Mentioned	17/07/2025
MPL LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400003931	1999	Incorrect Amount Mentioned	16/07/2025
MPL LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400002951	1252	Incorrect Amount Mentioned	16/07/2025
MPL LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400002956	1266	Incorrect Amount Mentioned	16/07/2025
MPL LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400003937	14000	Invalid Category	17/07/2025
MPL LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400002944	400	Invalid Category	16/07/2025
MPL LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400001719	400	Invalid Category	16/07/2025
MPL LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400007780	400	Incorrect Amount Mentioned	16/07/2025
MPL LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400002894	230	Incorrect Amount Mentioned	15/07/2025
MPL LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400002568	44	Incorrect Amount Mentioned	16/07/2025
MPL LOCAL AREA DEVELOPMENT SCHEME MPLADS	H072400002512	36	Incorrect Amount Mentioned	16/07/2025

4 Fund Transfer Approval – Funding Agency Level

As Per DoE's OM No. 03/(30)/PFMS/2022 dated 3rd June 2025, There will be only one level to approve the consolidated demand.

Steps:

- a. Funding Agency Checker must log in to the PFMS portal (<https://pfms.nic.in/>) and navigate to TSA Hybrid Fund Transfer Menu by clicking on collapsed menu icon at the left side. The interface displays two tabs:
 - i. **Pending for DSC** – Transactions awaiting digital signature.
 - ii. **Already Signed** – Transactions already signed.

1. **Pending for DSC at Funding Agency Checker Level:** The table containing the list of all the transactions pending for DSC will be appeared on the screen automatically under Pending for DSC tab.

The screenshot shows the PFMS Fund Transfer interface. At the top, there is a header with the PFMS logo, the text 'Public Financial Management System-PFMS', and the user's login details: 'Welcome: Rachita Gupta', 'User Type: AGENCY/DA', 'Agency: TSA Hybrid', 'Agency Unique Code: UPGR00017488', and 'Financial Year: 2025-2026'. Below the header, there is a 'Fund Transfer' section with a 'Scheme Name' dropdown set to '1251-Member of Parliament Local Area Develop...' and a 'Bank Account Number' dropdown set to '1234567845'. A 'Search' button is present. Below the search section, there are two tabs: 'Pending for DSC' (selected) and 'Already Signed'. The 'Pending for DSC' tab displays a table with the following data:

Select All	Fund Transfer ID	Number of Recipient Agencies	Amount
<input type="checkbox"/>	CD92021300240	2	1011
<input type="checkbox"/>	CD92021300203	1	1000
<input type="checkbox"/>	CD92021300191	1	2100
<input type="checkbox"/>	CD92021300195	1	10
<input type="checkbox"/>	CD92021300181	1	1000
<input type="checkbox"/>	CD92021300177	1	1000
<input type="checkbox"/>	CD92021300168	1	90
<input type="checkbox"/>	CD92021300166	1	100
<input type="checkbox"/>	CD42500000354	1	70
<input type="checkbox"/>	CD42500000352	1	400
Total Amount (Rs:)			6781

At the bottom of the table, there is an 'Apply DSC' button.

- b. In case, there is a requirement to check transaction against specific scheme, user can select **Scheme Name** and **Project Name** if applicable.
- c. The **Bank Account Number** field will be auto populated.
- d. Click on **Search** button.
- e. Click on the **View Assignment** hyperlink to view related assignments based on the selected **Scheme** and **Bank Account Number**.
- f. A table will appear displaying all transactions pending for DSC, including the Amount Fund Transfer ID and Number of Recipients agencies

- g. Select one or more transactions and click **Apply DSC**. The digital signature process will proceed, and the transaction will be forwarded to the RBI for payment processing.

List of Assignments				
Transaction ID	Sanction Number	Sanction Date	Total Amount	Balance Amount
S082001069311	TEST MPLAD	28/04/2025	50000000	4990939
Grand Total (Rs:)			50000000	4990939
Close				

- h. Click on the **No. of Recipient Agencies** hyperlink to view the files that have been consolidated for processing at the Funding Agency level.

List of Recipient Agencies of Fund Transfer Id : C092021300240				
Consolidation ID.	Recipient Agency Name	Bank Account Number	Consolidated Amount	Consolidation Date & Time
PCC11362	TSA Hybrid[UPGR00017488]	1277889900	1000	03/07/2025 11:10:55
PCC11370	TSA Hybrid[UPGR00017488]	1277889900	11	14/07/2025 15:22:20
Grand Total (Rs:)			1011	
Close				

- i. Click on the **Consolidation ID** hyperlink to view how many files have been grouped for visibility at the **Recipient Agency** level.

List of Claim for Consolidation ID: PCC11362			
Transaction ID.	Child Agency Name	Bank Account Number	Claim Amount
H072400002318	TSA Hybrid_7 [DLSD00002835]	1277889900	1000
Grand Total (Rs:)			1000
Close			

2. Viewing Fund Transfers Already Approved by Funding Agency Checker

- Go to the **Already Signed** tab to view all transactions that have been approved and signed by the Checker at the Funding Agency level.
- The table containing the list of all the transactions already approved and signed will be appeared on the screen automatically under **Already Signed** tab.
- In case, there is a requirement to check transaction against specific scheme, user can select **Scheme Name** and **Project Name** if applicable.
- The **Bank Account Number** field will be auto populated. Click on **Search** button.

User Guide – Maker and Checker Process - TSA Hybrid

Public Financial Management System-PFMS
(Formerly CPMS)

U/o Controller General of Accounts, Ministry of Finance

Welcome: Rachita Gupta
User Type: AGENCYDA
Agency: TSA Hybrid
Agency Unique Code: UPGR00017488
Financial Year: 2025-2026

U/o Controller General of Accounts, Ministry of Finance
Change Password
Login History
English

Fund Transfer

Scheme Name: 1261-Member of Parliament Local Area Developn
Bank Account Number: 1234567845
[View Assignment](#)
[Search](#)

[Pending for DSC](#) [Already Signed](#)

Fund Transfer ID	Number of Recipient Agencies	Amount
C04250000277	1	460
C04250000321	1	100
Total Amount (Rs:)		560

- e. User will be able to view all the signed Fund Transfer IDs.