

GOVERNMENT OF ODISHA
FINANCE DEPARTMENT

OFFICE MEMORANDUM

No. 32888 /F.,
FIN-TRY-MISC-17/2016

Dated-13.11.2017

Sub:- Procedure for submission of pension application through online in IFMS, Odisha.

The retiring / retired Government employees eligible for pension and Legal heirs of deceased Government servant eligible for Family/LTA (Life Time Arrear) pension are required to submit their pension application in the prescribed form as per the Orissa Civil Service (Pension Rules 1992) read with OCS (Pension) Amendment Rules, 2015 to the Head of Offices. Subsequently, after detailed verification of the records available in the office, the Head of Office forwards the pension application along with the Service Book to the Pension Sanction Authority (PSA) for onward transmission of pension papers to the Pension Issuing Authority (PIA). The Pension Payment Order (PPO) is issued by the Pension Issuing Authority i.e. A.G (A&E), Odisha and transmitted to the Disbursing Officer (Treasury Officer) for final disbursal of the pension to the retiring or retired Government employees and family pensioner.

In the aforesaid procedure relating to pension application processing, there is a high degree of manual intervention in all stages. The retiring/ retired Government employee/ family pension applicant remains unaware of the developments taking in various offices in different stages of pension application processing. Often the retiring/ retired employee/ family pension applicant has to run from one Office to another to know the status of processing of his/ her pension application. In order to infuse transparency into the system and ensure hassle free processing of pension application, IFMS, Odisha has been enabled to provide the facility for online pension application processing system. Hereafter, the online pension module will be used by the retiring/ retired employees/ family pension applicant, Head of Office, Pension Sanction Authority and Pension Issuing Authority to process the pension application. The operational procedure relating to online submission and processing of pension application is outlined below:

COVERAGE : All State Government employees/ legal heirs of the deceased Government Servant eligible for pension/ family pension under OCS Pension Rules 1992 can submit their pension application forms using the Online Pension Module of IFMS Odisha to their respective Head of Offices.

1. Processing of pension application forms in the online pension application module from the level of Head of Office will be mandatory.
2. The processing of the pension application in the office of the Head of Office and Pension Sanctioning Authority will be made as per the usual official process in the

file. After obtaining the approval from the competent authority, the application will be processed in the online pension module in two levels i.e. Operator & Approver for transmission of the approved / rejected application to the appropriate person or authority.

3. The Head of Office / Pension Sanctioning Authority will authorize the officer / official to work as ‘Approver’ or ‘Operator’ as the case may be in processing of online pension application. In case the authorized official is not the Head of Office / PSA, he/she may forward the document to the next level and the hardcopy of application should be signed by the competent authority.
4. The process to be adopted for submission of online pension/ family pension application by the retiring employees/ legal heirs of deceased Government Servant eligible for Family/ LTA, processing at the level of Head of Office, Pension sanctioning Authorities (PSA) and Pension Issuing Authority i.e. Office of the Principal Accountant General (A&E) are explained as follows:

SUBMISSION OF PENSION APPLICATION:

Role of Applicant

1. The retiring/ retired employee shall submit the online Pension Application using the pensioners Portal (<https://www.odishatreasury.gov.in/PensionPortal>). The retiring/ retired employee shall fill up the details in Pension Application Form available under the menu Citizen Services of “Pensioners portal”. The IFMS Odisha also provides a link to the Pensioners’ portal for the convenience of the user.
2. Applicant, after selecting the type of pension shall enter her/his GPF Account No. or the HRMS Employee ID to auto populate the Pension Application Form with the personal details such as: Name, personal identification mark, PAN No., Aadhaar No., contact No. name of the last office attended etc. The information relating to remaining fields of the page on personal details, family details and nominee details shall be provided by the applicant in the online portal and submitted to Head of Office.
3. Before submission of Pension Application in **Form –“E”**, the applicant may also upload her/his thumb impression/signature, joint photograph, identification documents etc. duly attested by the Head of Office. The photographs may be uploaded in the jpg or jpeg format.
4. After submission of online pension application, the applicant shall take the printout of the Pension Application **Form – E”** along with “**Form - C & D”** from the Portal and submit the hard copy of application to the Head of Office, under her/his signature in presence of two witnesses whose signature should also be recorded in the hard copy of the application (**Form-C**). The pension application **Form – E, C & D** will be submitted along with joint photograph and relevant documents duly attested by the Head of Office.

5. In case, the applicant is not able to submit online application, she/he shall submit the application in prescribed form (Form E, C & D) duly filled in, along with relevant documents directly to Head of Office who shall initiate the process for submission of “Pension Application Form” in Pension Portal on behalf of the retiring/ retired employee.
6. The online submission of Application is also applicable for grant of Family Pension on the death of Government servant. At the time of submission of online Application, the applicant shall enter GPF Account No. or the HRMS Employee ID of the deceased Government employee to auto populate the Pension Application Form and select the type of pension as “Family Pension”, thereby enter the date of online Application in Pension Portal, the applicant shall take the print out of the Application in “**Form –K**” and submit the physical form along with relevant documents to Head of the Office. In case, the applicant is not able to submit online application, she/he shall submit the application in prescribed form (**Form- K**) duly filled in directly to Head of Office, along with relevant documents who shall initiate the process for submission of “Pension Application Form” in Pension Portal on behalf of the applicant.

(A) PROCESSING OF PENSION APPLICATION AT THE LEVEL OF HEAD OF OFFICE:

**Establishment
Section**

1. After receipt of the hard copy, the authorised Official of the concerned section of the Head of office dealing in pension matters shall open the online application in pension preparation menu of IFMS, Odisha Portal (<https://www.ifmsodisha.gov.in> or <https://www.odishatreasury.gov.in>) by using her/his Login Id. She/he has to acknowledge the receipt of the Pension Application and forward to Operator Login of the Head of Office for processing with a note/observation.

Operator

2. In operator Login, the user shall check the application by selecting from task list and shall verify the Application in details. If any discrepancy is noticed, that can be rectified at that level. The operator shall also enter the service details, Retirement Benefit Details, Recovery details and Provisional pension details of the applicant on the basis of information available in the service book of the applicant and other relevant information as per the extant practices and provisions.
3. The Operator shall upload the documents in support of thumb impression/signature, joint photograph, identification documents, death certificate and legal heir certificate etc., duly attested by Head of Office unless uploaded by the applicant earlier.
4. The Operator shall generate the appropriate Forms as prescribed namely – E, K, J, L, C, D and F etc. as per the category of pension and place in the office file for necessary approval from Head of the office.
5. After obtaining the approval of the Head of Office in respect of the pension application processed in the file, the operator shall verify if there is any modification

to the Forms earlier generated from the portal. He/she shall rectify the information contained in the online application as per the approval taken in the file and forward the online Application to Head of Office (Approver) Login.

Approver

6. The Head of Office (Approver) shall open the online application in IFMS using her/his Login Id selecting from Task list and shall scrutinise the details in the hard copy of Pension Application placed in the office file vis-à-vis online Application.
7. The Head of the Office (Approver) shall send the hard copy of the pension application Form along with attached Forms, documents of the Applicant and the Service Book in original to the Pension Sanctioning Authority. The letter number and date on which the hardcopy of the pension application has been despatched shall be recorded in the online pension application by the Approver before forwarding to the Pension Sanctioning Authority.
8. If Head of Office intends to object the online application on any ground, then the application shall also be rejected through online. In case of rejection, the reasons of rejection shall be intimated to the applicant through SMS alert with a request to submit online application again. In such cases, the Applicant shall submit the fresh online Application in pension portal of IFMS by using the HRMS ID/ GPF Number. In that case, the data already entered previously during submission of Online Application shall be auto populated with edit option.

(B) PROCESSING OF PENSION APPLICATION AT THE LEVEL OF PENSION SANCTIONING AUTHORITY (PSA) :

**Establishment
Section**

1. After receipt of the hard copy of Application, the authorised Official of the concerned section of the Pension Sanctioning Authority dealing in pension matters shall open the online application in pension preparation menu of IFMS, Odisha Portal (<https://www.ifmsodisha.gov.in> or <https://www.odishatreasury.gov.in>) by using her/his Login Id. She/he has to acknowledge the receipt of the Pension Application and forward to Operator Login of the Pension Sanctioning Authority for processing with a note/observation.

Operator

2. The Operator of the Pension Sanctioning Authority shall verify the Online Pension Application with the hard copy of the Pension Application received in the office and the service record in details. To open the Online Pension Application received from Head of the Office, the Operator has to select that specific online pension application from the task list by giving her/his Login Id.
3. The Operator shall generate and print the Draft Pension Sanction Orders **Form-F (Part-II) / Form- L (Part-II) / Form- R** and the forwarding letter (**Form – G** (for retiring Government Servant) / **Form – M** (for Family Pension) as per the category of Pension from IFMS Portal and process for approval of the Pension Sanctioning Authority.

4. After obtaining the approval of the Pension Sanctioning Authority in respect of the pension sanction processed in the file, the operator shall forward the online Application to the Approver Login of Pension Sanctioning Authority.
5. In case there have been modification to the Pension Sanction Order generated from the system at the level of Pension Sanctioning Authority, the Operator/ Approver of the Pension Sanctioning Authority can make such rectification in the online Application. If such rectification leads to any change in the Form already submitted by the Head of Office, the Pension Sanctioning Authority may either revert the Online Application along with hard copies of the Head of Office or authenticate the Forms generated due to such modification under her/his signature.
6. The authorised Approver in the office of the Pension Sanctioning Authority shall forward the Online Pension Application after the despatch of the hardcopy of Pension application along with Service Book and documents to Pension Issuing Authority. The authorised Approver shall mention the Letter number and date of despatch of the hard copy of Application in the Online Application before forwarding to Pension Issuing Authority.
7. In case the application is reverted back, after necessary correction and compliances to the objection raised by Pension Sanctioning Authority, the Head of Office shall resubmit the application to Pension Sanctioning Authority who shall forward the same to Pension Issuing Authority after due approval.

(C) PROCESSING OF PENSION APPLICATION AT THE LEVEL OF HEAD OF THE OFFICE WHO ALSO ACTS AS PENSION ISSUING AUTHORITY (PIA) :

1. In some cases where, Head of Office may also be the Pension Sanctioning Authority, the processing of Online Pension Application will be made in two level namely Head of the Office and Pension Sanctioning Authority even in the same office.
2. The same person may play the role of Establishment Assistant/Operator / Approver for both Head of Office & Pension Sanctioning Authority with two different Logins. However, it is suggested that for two levels verification different persons may be assigned the roles to ensure correctness of the Data.

(D) PROCESSING OF PENSION APPLICATION AT THE LEVEL OF PENSION ISSUING AUTHORITY (PIA) :

1. The Pension Issuing Authority [A.G (A&E), Odisha] shall download the pension application data from IFMS Odisha upon receipt of the hardcopy of the application along with the Service Book in original from Pension Sanctioning Authority.
2. A.G (A&E), Odisha will process the pension application form in their Pension module and shall issue the authorities of (PPO/FPPO), CPO and GPO as usual in respect of the applicant. In case of any discrepancy noticed, Pension Issuing

Authority shall revert back the online application along with hard copies received to the concerned Pension Sanctioning Authority with objection memo.

3. The Pension Sanctioning Authority may rectify the error or send back the online pension application, along with hard copies to the level of Head of Office for rectification. After due rectification, the application shall be resubmitted to Pension Issuing Authority through Pension Sanctioning Authority.

(E) PROCESSING AT THE LEVEL OF TREASURY AFTER ISSUE OF ONLINE PENSION PAYMENT ORDER (PPO):

Once a Pension Payment Order (PPO/ FPPO) is successfully generated & issued, the detail information will be populated in pension application module of IFMS, the concerned Treasury will only enter the PPO number to retrieve the pensioners' data for processing of Pension at the Treasury level.

An SMS shall be sent to the pensioner at each stage of processing of the pension papers. The pensioner can also view the status of her/his pension papers from the "File Processing History" under the Sub-Menu Citizen Services of the Pensioners' Portal (<https://www.odishatreasury.gov.in/PensionPortal>).

(F) CREATION OF USER IDS FOR PROCESSING OF ONLINE PENSION APPLICATION

The Treasury Officers will have the responsibility for creation of user Ids (Establishment section, Approver and Operator) for Head of Office and Pension Sanctioning Authority.

The Head of Office and Pension Sanctioning Authority are required to submit a list of Users along with their role (Establishment section Approver and Operator) to the Treasury Officer as per the format enclosed in the Annexure. In case of any difficulty faced, the matter may be escalated to the Directorate of Treasuries. The time line for creation of user IDs by the Treasuries is (3) three working days, and deactivation of Id by next working day of intimation.

The system has the inbuilt facility to create multiple users for Establishment section, approver and operator function within the same office. The Head of Office and Pension Sanctioning Authority have to exercise due diligence in recommending the Treasury Officer while creating users.

In case where, the Head of Office is also the Pension Sanctioning Authority, two separate sets of Login Ids for Head of the Office and Pension Sanctioning Authority shall be used for processing of the online Application.

In case of transfer, retirement, or any other occasion resulting in the cessation of duties in a particular office of an official who has been provided with user Id, the

Head of Office and Pension Sanctioning Authorities will intimate the Treasury Officer for deactivation of the User Id in order to restrict unauthorized use of Id.

(G) DEEMED AMENDMENT TO O.C.S. (PENSION) RULE- 1992

The Online Pension Application process has been designed as per the process laid down in O.C.S. Pension Rule-1992. The Forms will be generated from the system as per the prescribed format. Some additional information such as Aadhaar Number, Mobile Number, e- Mail Id and Bank details etc. are collected in the online process for the convenience of the pensioner. The existing provision of the O.C.S. Pension Rule-1992 stands modified to this extent.

By order of the Governor

(Tuhin Kanta Pandey)
(Principal Secretary to Government)