GOVERNMENT OF ODISHA
FINANCE DEPARTMENT
***

No. **5726** /F.,   Dated **09.03.2022**
FIN-TRY-PEN-0001-2021

OFFICE MEMORANDUM

Sub: **Procedure for Online Submission of Pension Application in case of Retiring/Retired Employees of Aided/ULB/Taken over Educational Institutions.**

In the extant process, the retiring/retired employees, legal heir of deceased employees of Aided/ULB/Taken over Educational Institutions eligible for pension /family pension are required to submit their pension application in the prescribed form as per the Finance Department Office Memorandum No-32321/F dated 22.11.2021 to their Head of Office for onward transmission to Pension Sanctioning Authority and Pension Issuing Authority. After necessary verification, Pension Payment Order is issued and uploaded by the Pension Issuing Authority i.e. office of the Controller of Accounts, Odisha for final disbursement of the pension by the Treasury Officer/Sub-Treasury Officer to the Pensioner or Family Pensioner.

2.   In the aforesaid procedure for processing of Pension Application, there is a high degree of manual intervention at all stages. The Pensioner or Family Pensioner remains unaware of the developments taking place in various offices at different stages of the pension application processing. Adhering to the principles of 5T and Mo Sarkar and in order to infuse transparency into the system, to ensure hassle free processing and tracking of pension application, facility for online processing of Pension Application has been developed in IFMS, Odisha.

3.   The Online Pension Module in IFMS will be used by the Retiring/Retired employees/Family Pension Applicant, Head of Office, Pension Sanctioning Authority and Pension Issuing Authority to process the Pension Application at different stages.

4.   All retiring/retired employees, legal heirs of deceased employees of Aided/ULB/Taken over Educational Institutions eligible for Pension/Family Pension under Orissa Aided Educational Institutions Employees Retirement Benefit Rules, 1981 and Orissa (Non-Government Aided Primary School Teachers) Retirement Benefit Rules 1986 can submit their Pension Application Forms using the Pension Module of IFMS, Odisha to their respective Head of Offices.

5.   All Head of Offices will mandatorily process the Pension Application Forms in the Online Pension Application Module in IFMS, Odisha.

6.   The processing of the Pension Application in the Head of Office and Pension Sanctioning Authority will be made as per the extant official process in the file. After obtaining the approval from the Competent Authority, the application will be processed in the Online Pension Module at two levels i.e., **Operator & Approver** for transmission of the approved/rejected application to the appropriate person or authority.

7.   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 the Online Pension Application.

8.   The process to be followed by the applicant of Pension/Family Pension, Head of Office, Pension Sanctioning Authority and Pension Issuing Authority is explained as follows:

A. **SUBMISSION OF THE PENSION APPLICATION BY THE APPLICANT**

I.   The Pension/Family Pension applicant shall submit the online Pension Application using "**Pension Application Form"** under the menu "**Citizen Services"** in **Pensioners' Corner** of portal of IFMS, Odisha**(https://www.odishatreasury.gov.in).**The applicant shall fill up the details in the Pension Application Form.

Role of Applicant

II. The 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, Permanent Account Number, Aadhar No., Contact No., Name of the last office attended etc. The information relating to remaining fields on personal details, family details and nominee details of the form shall be provided by the applicant and submitted to the Head of Office.

III. Before submission of Pension Application in "Form –E", the applicant may also upload scanned copy of his/her thumb impression/signature, joint photographs, identification documents etc. duly attested by the Head of Office in the prescribed format and manner.

IV. After submission of online pension application, the applicant shall take printout of the Pension Application **"Form-E"** along with **"Form-C & D"** from the IFMS 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)**. Then **Forms - E, C & D** will be submitted along with joint photograph and relevant documents duly attested by the Head of Office.

V. In case, the applicant is not able to submit the online pension application, she/he shall submit the physical application in prescribed form (Form-E, C & D) duly filled in along with relevant documents directly to the Head of Office who shall initiate the process for submission of "Pension Application Form" in Pension Portal on behalf of the applicant.

VI. This online facility is also available for processing of family pension. At the time of submission of online application, the applicant shall enter GPF Account No. or the HRMS Employee Id of the deceased employee to auto populate the Pension Application Form and select the type of pension as "Family Pension", thereafter enter the Date of Death of the deceased employee. After submission of the Family Pension Application, the applicant shall take print out of the Application in "Form –K" and submit the physical form along with relevant documents to the Head of Office. In case, the applicant is not able to submit online application, she/he shall submit the physical application in prescribed form (Form-K) duly filled in directly to the Head of Office, along with relevant documents who shall initiate the process for online submission of "Pension Application Form" on behalf of the applicant.

B. PROCESSING OF PENSION APPLICATION AT THE LEVEL OF HEAD OF OFFICE

Establi-shment Section

I. After receipt of the hard copy, the authorized 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.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.

II. In operator Login, the Operator shall check the application by selecting from the task list and shall verify the application in details. If any discrepancy is noticed, it can be rectified by the Operator.

Operator

III. 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 retired/deceased employee and other relevant records as per extant practices and provisions.

IV. The Operator shall upload the documents in support of thumb impression/signature, joint photograph, identification documents, death certificate and legal heir certificate etc. as the case may be, duly attested by the Head of Office, unless uploaded by the applicant earlier.

V. The Operator shall generate the appropriate Forms as prescribed namely – C, D, E, F, J, K and L etc. as per the category of pension and place in the office file for necessary approval from the Head of Office.

VI. 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 in 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 the Head of Office (Approver) Login.

VII. The Head of Office (Approver) shall open the online application in IFMS using her/his Login Id. The concerned online application form can be selected from the task list. She/he shall scrutinize the details with the hard copy of the Pension Application available in the office record.

VIII. 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 hard copy 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.

IX. If the Head of Office intends to object the pension application on any ground, then the application shall also be rejected through online mode. In case of rejection, the applicant shall be intimated through SMS alert with a request to submit online application again. In such cases, the Applicant shall submit the online application again in pension portal of IFMS by using the HRMS Id/GPF Account Number. In that case, the data already entered during submission of the online application previously shall be auto-populated with edit option.

C. PROCESSING OF PENSION APPLICATION AT THE LEVEL OF PENSION SANCTIONING AUTHORITY (PSA)

I. After receipt of hard copy of the 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.odishatreasury.gov.in) by using her /his Login Id. She/he has to acknowledge the receipt of the Pension Application and forward it to the Operator Login of the Pension Sanctioning Authority for processing with a note/observation.

II. 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 the Head of the Office, the Operator has to select that specific online pension application from the task list by giving her/his Login Id.

Operator

III. 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 employee) / Form-M (for Family Pension) as per the category of pension from IFMS Portal and process for approval of the Pension Sanctioning Authority.

IV. 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 the Pension Sanctioning Authority.

V. In case there has been modification to the Pension Sanction Order generated from the system at the level of the 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 to the Head of Office or authenticate the Forms generated due to such modification under her/his digital signature.

Approver

VI. The authorised Approver in the office of the Pension Sanctioning Authority shall forward the Online Pension Application after despatch of the hard copy of the Pension Application along with Service Book and other documents to the 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 it to the Pension Issuing Authority.

VII. In case the application is reverted to the Head of Office, after necessary correction and compliance to the objection raised by the Pension Sanctioning Authority, the Head of Office shall resubmit the application to the Pension Sanctioning Authority who shall forward the same to the Pension Issuing Authority after due approval.

D. PROCESSING OF PENSION APPLICATION AT THE LEVEL OF HEAD OF OFFICE WHO ALSO ACTS AS THE PENSION SANCTIONING AUTHORITY (PSA).

I. In some cases, the Head of Office may be the Pension Sanctioning Authority also. In such cases, the processing of Online Pension Application will be made in two levels namely: Head of Office and Pension Sanctioning Authority in the same office.

II. The same person may play the role of Establishment Assistant/Operator/Approver for both Head of Office and Pension Sanctioning Authority with two different Logins. However, it is suggested that for the two levels of verification, different

persons/officials may be assigned the roles to ensure correctness of the data/information.

E. PROCESSING OF PENSION APPLICATION AT THE LEVEL OF PENSION ISSUING AUTHORITY (PIA)

I. The Pension Issuing Authority (The Controller of Accounts, Odisha) shall receive the pension application through an automated process or till the automated process is in place, the designated officer will be authorised by the Controller of Accounts, Odisha to download the pension application data from IFMS, Odisha upon receipt of the hard copy of the application along with the Service Book in original from the Pension Sanctioning Authority.

II. The Controller of Accounts, Odisha will process the Pension Application Form in their Pension Module and shall issue and upload the electronic authorities such as Pension Payment Order (PPO)/Family Pension Payment Order (FPPO), Commuted Value of Pension Order (CPO) and Gratuity Payment Order (GPO), as the case may be, in respect of the applicant(s) as laid down in Finance Department Office Memorandum No.1923/F dated 19.01.2021.The authorised officer of the Controller of Accounts shall upload the electronically issued pension authority/ transfer it to IFMS, Odisha which is to be made available at the interface of the respective payable treasuries through their authorised login credentials.

III. Intimation in respect of issue of the pension authorities will be sent by the Controller of Accounts, Odisha to the pensioners through SMS (only) in their registered mobile number.

IV. In case of any discrepancy noticed in the Online Pension Application, the Pension Issuing Authority shall send back the online application along with hard copies received to the Pension Sanctioning Authority concerned with objection memo.

V. On receipt of the objection memo, 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 online in IFMS to the Pension Issuing Authority through the Pension Sanctioning Authority.

F. PROCESSING AT THE LEVEL OF TREASURY AFTER ISSUE OF PENSION PAYMENT ORDER (PPO)

I. Once the Pension Payment Authorities are successfully generated, issued/transferred/uploaded by the Pension Issuing Authority, the detail information will be populated in the Pension Application module of IFMS. The data relating to the pension authorities will be automatically populated in the Pension Application Module of IFMS relating to part-1 and part-2 of the Pension Payment Order.

II.   The Officer of the payable Treasury/ Sub-Treasury will download the authorities using her/his login credentials and follow the extant process for disbursement of the pension as provided in Finance Department Office Memorandum No.1923/F dated 19.01.2021.

III. After the pension disbursement, payment information such as TV No., date of payment etc. will be shared by the Pension Module of IFMS to the Controller of Accounts/Pension Issuing Authority for updating their systems and records pertaining to the encashment of the authorities issued. In case of non-encashment of authorities beyond prescribed time limit, the Treasury Officers shall return the authority with non-payment certificate, and intimate the Pension Issuing Authority for necessary revalidation or cancellation, as the case may be, following the extant provisions and practices.

G.   INFORMATION TO THE PENSIONER / APPLICANT

I.   The intimation shall be sent to the pension applicant through SMS (only) in their registered mobile number at each stage of processing of the pension papers.

II.   The Pension Applicant can also view the status of her/his pension application from the IFMS portal. The link is also provided in the 'Pensioner's Corner' of the IFMS Portal. The status of the pension application can be viewed by using the menu 'Citizen Services' -> sub-menu 'Pension Application form'. In the sub-menu, 'Pension Application Form', the applicant has to provide his/her GPF Account Number to fetch the status of his/her Pension Application.

III. The electronic authorities will be available in the IFMS portal https://www.odishatreasury.gov.in under heading Controller of Accounts ->GPF/Pension queries & http://www.caodisha.nic.in portal of the Controller of Accounts which can be downloaded by the retired employee/applicant for Family Pension for their reference.

IV.   The electronic Pension Payment Order (PPO) will be available in the DigiLocker account of the pensioner/family pensioner to view/download it.

H.   UPLOADING OF E-REVISION PENSION AUTHORITIES (e-PPO/CPO/GPO)

I.   Revision proposal shall be received in offline mode. The PSAs shall mention the GPF Account Number with series and mobile number of the applicant in the forwarding letter to facilitate processing of pension paper and to send SMS to the applicant by the office of The Controller of Accounts.

II.   E-Revision authorities arising out of such revision against authorities (both electronic and manual) already issued shall be uploaded by the authorised Officers of the Controller of Accounts in the IFMS portal. The information regarding the issue/upload of

revised e-authorities will be sent to the pensioner through SMS. The same will also be available for the pensioner to download through the link as mentioned at para-G(III) above.

III. The Treasury Officers of payable Treasury will download the authorities using her/his login credentials and follow the extant process for disbursement of the pension as provided in Finance Department Office Memorandum No.1923/F dated 19.01.2021.

I.   USE OF DSC BY THE HEAD OF OFFICE/PENSION SANCTIONING AUTHORITY:

I.   Facilities will be available for the Head of Office (Approver) and Pension Sanctioning Authority (Approver) to digitally sign the pension application forms/ the relevant attached documents including photographs using the digital signature/e-signature by the appropriate authority.

II.   After signing with digital signature/e-signature, the application can be forwarded by the Head of Office to the Pension Sanctioning Authority. In such cases where the digital signature/e-signature has been used by the Head of Office, the print copy of the pension application is not required to be sent to the Pension Sanctioning Authority. The Pension Sanctioning Authority can download the application received from the Head of Office for the purpose of processing the application in their official record.

III.   The Pension Sanctioning Authority can also use digital signature/e-signature at their level for forwarding/sanctioning the pension application to the Pension Issuing Authority (the Controller of Accounts, Odisha). The Pension Sanctioning Authority is required to sign the pension application along with all enclosures using the digital signature/e-signature for processing of the pension application at the level of Pension Issuing Authority. In such a case the Pension Sanctioning Authority will not be required to send the hard copy of the application and related documents to the office of the Pension Issuing Authority. Further, in the absence of e-Service Book, the physical Service Book of the retiring employee along with the forwarding letter (Form G) has to be sent by the Head of Office to the Pension Sanctioning Authority and also by the Pension Sanctioning Authority to the Pension Issuing Authority.

IV.   If required the Controller of Accounts, Odisha can download the pension application and relevant documents where digital signature has been made and keep the print copy in the official record for processing.

V.   During the pilot phase of implementation i.e., from the date of notification till 30th June 2022, the Head of Office and the Pension Sanctioning Authority will be required to send the hard copy of the

application irrespective of the fact that the pension forms and other relevant attachments have been signed using the digital signature/e-signature.

J. PROCEDURE FOR OBTAINING DIGITAL SIGNATURE/E-SIGNATURE

I. Class-2 digital signature/e-signature is required to be used for the purpose of pension application processing by the Head of Office and the Pension Sanctioning Authority. The concerned offices will either procure the digital signature from the available fund under 'Contingency' in their offices or can request the Director of Treasuries & Inspection, Odisha through the Treasury Officer for issue of e-signature. The detailed Standard Operating Procedure for use of digital signature and e-signature in the IFMS portal is provided by the Director of Treasuries & Inspection, Odisha. After obtaining the digital signature/e-signature, as the case may be, the authorised officer in the office of the Head of Office and Pension Sanctioning Authority will register their digital signature/e-signature in the manner prescribed by the Director of Treasuries & Inspection, Odisha.

II. All District Treasuries/Special Treasuries of the State will provide necessary hand holding, training and support to the authorised officers of the Head of Office and Pension Sanctioning Authority for use of the digital signature/e-signature.

III. Treasuries will also provide necessary technical support to the retired employees/pension applicants, authorised officers of Head of Office and Pension Sanctioning Authority to operate the online process from time to time.

K. CREATION OF USER IDS' FOR PROCESSING OF ONLINE PENSION APPLICATION

I. The Treasury Officers shall have the responsibility for creation of user IDs (Establishment Section, Approver and Operator) for Head of Office and Pension Sanctioning Authority.

II. The Head of Office and the Pension Sanctioning Authority are required to submit a list of users along with their role (Establishment Section, Approver & 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 & Inspection, Odisha. The time line for creation of user Id by the Treasuries is three (3) working days, and deactivation of Id by next working day of the date of intimation.

III. 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.

IV.   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.

V.   In case of transfer, retirement or any other occasion resulting in the cessation of duties of an official who has been provided with user id, the Head of Office and/or Pension Sanctioning Authorities, as the case may be, will intimate the Treasury Officer well in advance for updation of the profile details of the User/Users in order to restrict unauthorized use of the Id.

VI.   In case the users for Establishment Section, Approver and Operator at different levels of Head of Office, Pension Sanctioning Authority already have User Id and Password in respect of processing of pension applications, the same User Id and Password can be used for Aided/ULB/Taken over employees of Educational Institutions.

L.   TIMELINE FOR IMPLEMENTATION

Implementation of online processing of pension application shall be on pilot basis with effect from the date of publication of this Office Memorandum. The piloting shall run till 30th June, 2022. Final roll out of the online processing of pension application form shall be with effect from 1st July, 2022. After the final roll out, all applications will be mandatorily received and processed in the online mode using the digital signature/e-signature of the authorised officers.

M.   DEEMED AMENDMENT OF RELEVANT RULES

The Online Pension Application process has been designed as per the process laid down in the Odisha Aided Educational Institutions Retirement Benefit Rules, 1981 read with Executive Instruction No-11931 dated 21.03.1983, Orissa(Non-Government Aided Primary School Teachers) Retirement Benefit Rules 1986, Finance Department Office Memorandum No.32321/F dated 22.11.2021, OCS (Pension) Rules 1992 read with OCS (Pension) Amendment Rules, 2015, The Orissa Municipal Employees Pension Rules, 1989, ULB as applicable. 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 provisions of the Odisha Treasury Code and above mentioned Rules, Circulars, executive instructions etc. stand modified to this extent.

Sd/-
Principal Secretary to Government

FORMAT FOR CREATION OF
LOGIN ID IN ONLINE PENSION MODULE

Pension Sanctioning Authority/ Head of Office

1. Name of the Office : _____

2. DDO Code : _____

3. Name of the Treasury : _____

Sl. No.	User	Details	Mobile
1	Establishment Clerk/ Diary	Name: DoB:	
2	Operator	Name: DoB:	
3	Approver	Name: DoB:	

Signature of
Pension Sanctioning Authority/Head of Office (with Seal)