

## User Manual for SAMPANN 2.0 (Module – 3)

### Enhancements made under Module – 3 of SAMPANN 2.0:

#### 1. User Management Changes (Addition, Updating, Deletion etc.)

1.1. The User Management Changes module introduces a controlled, centralized, and role-governed mechanism for managing user accounts within the SAMPANN 2.0 system. This enhancement is designed to strengthen governance, security, and auditability by clearly separating user account lifecycle management from role-based rights assignment.

This utility will now enable the addition of new user ids only after the approval of CCA user. However, the user ids will be created in the same way as it is done presently i.e. AO user will create AAO user and AAO user will create DH user but the same will be approved by CCAs. Further, the CCAs will now have the option to “**Deactivate user**” in case of permanent absence of the official for any reason like transfer, retirement or for any other reasons or to “**Archive User**” in case of temporary absence like leave, transfer within office etc.

#### 1.2. Process Flow:

##### 1.2.1. Process Flow for User creation:

- After creation of user at the authorized level, as it is done in present scenario, the case will automatically send for CCAs approval.
- Login as CCA user → sidebar → Click on Users → User Creation Approval

Section	Role	Username	Full Name	Email	Mobile	Actions
PDA	AAO(PDA)	brajpdAAO	Isztr	sddtyd@gov.in	7890987890	Approve/Reject
Pension Section	DH(Pension Section)	pdpendh	Pranav	pranav@gov.in	43434343	Approve/Reject

- Page will appear with all the pending cases for user creation approval along with Approve/Reject link against them.

- If approved, the user can login for the first time.
- After action, the case will disappear from the page.

### 1.2.2. Process flow for User Management:

- Login as CCA user → sidebar → Click on Users → User Management.
- User Management page will appear with all the current users along with their roles and an Archive/Deactivate link against them.
- Required action can be initiated against the user.

Name	Username	Email	Mobile	Role	CCA	Actions
Mr. test test	administrator	dileep.sai@abc123aksitservices.co.in	8247085157	Admin		Archive / Deactivate
Mr. Bihar CCA	BTCCCA	vinayak.kshirasagar@abc123aksitservices.co.in	9818550368	CCA	Controller of Communication Accounts	Archive / Deactivate
Mr. Punjab CCA	PTCCCA	ptc@abc123cca.com	9712311453	CCA	Controller of Communication Accounts	Archive / Deactivate
Mr. Haryana CCA	HTCCCA	htc@abc123cca.com	9650737302	CCA	Controller of Communication Accounts	Archive / Deactivate
Mr. Orissa CCA	OTCCCA	otc@abc123cca.com	9437462720	CCA	Controller of Communication Accounts	Archive / Deactivate
Mr. C. B. Singh	bsnlerp	bsnl@abc123erp.com	9958638748	BSNL ERP User	Controller of Communication Accounts	Archive / Deactivate
Mr. mayank misal	patnahoo@gmail.com	patnahoo1@abc123gmail.com	9541258233	HOO(SSA Unit)	Controller of Communication Accounts	Archive / Deactivate
Late. Shankar kumar	chaprahoo@gmail.com	tyjutyiyufu@abc123gmail.com	9599721127	HOO(SSA Unit)	Controller of Communication Accounts	Archive / Deactivate
Mr. Saurabh Kumar	chaprath	chaprathn@abc123gmail.com	9896665646	DH(SSA Unit)	Controller of Communication Accounts	Archive / Deactivate
Mr. Raghav Sharma	Raghav1	raghav@abc123gmail.com	9892378091	AO(Pension Section)	Controller of Communication Accounts	Archive / Deactivate

### 1.2.3. MIS Report for User Management:

- Login as CCA user → sidebar → Click on Reports → User Management Report.

CPMS Controller of Communication Accounts User

User Workflow MIS

CCA Office: CCA - Bihar Telecom Circle From Date: 01/01/2026

To Date: 12/01/2026 Status: Select Status

Search Reset

Select Status

- Created
- Approved
- Archived
- Deactivated

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## 2. New Tax Regime Changes

2.1 This utility will provide pensioners with flexibility to choose their preferred tax regime (old or new), declare exemptions and investments, and upload relevant proofs to facilitate accurate tax computation. The feature ensures that the pension calculation process remains aligned with government regulations, while offering pensioners clarity and transparency on their tax liabilities.

### 2.2 Functionality

- The administrator will configure tax rules, slabs, exemptions, and deductions in a **master-driven solution** at the start of each financial year, based on the provisions announced in the Union Budget.
- Pensioners will have the option to select their **preferred tax regime** (Old or New) and they can **declare their investments and exemptions** (e.g., LIC, PPF, medical insurance) at the start of the financial year for consideration in tax computation along with **uploading of supporting documents/proofs** (such as premium receipts, medical bills, investment certificates) for validation by authorized officials.
- **Provisional tax calculation** will be done by CPMS – SAMPANN at the beginning of the financial year and the estimated annual tax liability will be displayed to pensioners. TDS will be deducted automatically during monthly pension disbursement as per the declared tax regime.
- Changes in tax rules as per amendments/Union Budget updates will be applied centrally and reflected for all pensioners in real-time

### 2.3 Process Flow:

- Pensioner → sidebar → Investment Declaration → Select preferred tax regime → Upload investments and exemption related documents.
- Login as AO PDA → sidebar → Investment Declaration → Select particular case from pending cases → Allocate to DH.
- Login as DH PDA → sidebar → Investment Declaration → Select particular case → Reviewed by the DH → In case of discrepancy, return to Pensioner. Otherwise, approved. If approved, sent to AAO.
- Login as AO PDA → sidebar → Investment Declaration → Select particular case from pending cases → Review → Approve → IT Calculation initiated → IT Calculation sheet generated.
- After IT Calculation Sheet Generation, the calculation will form the part of next monthly bill, whenever generated.

- There is provision to view the IT Calculation sheet at AO level. Login as AO PDA → Sidebar → IT Calculation sheet → Select pensioner → view.

### 3. Pension Slip Generation

**3.1.**Traditionally, pensioners could log in with their credentials and download their pension slip for a specific month and year, accessible only to themselves. With the new enhancement, OTP-based authentication has been incorporated, ensuring secure access. Further, the functionality is extended to PDA users, who can now generate the pension slip of any pensioner by entering their PPO number, which can be pushed directly to pensioners via email, and pensioners will receive SMS alerts upon dispatch of their pension slips.

#### 3.2.Process Flow for PDA Users:

- Login as PDA User (DH/AAO/AO).
- Sidebar → Generate Pension Slip → Enter PPO Number → Select Financial Year and Month to View/Download Pension Slip.

The screenshot displays the CPMS web application interface. The top header is green and contains the text 'Accounts Officer(Pension Disbursing Authority)' and a user profile icon. The left sidebar is dark blue and lists various system functions, including 'Generate Pension Slip'. The main content area is white and features a form titled 'Generate Pension Slip'. The form has three input fields: 'PPO Number' (a text box), 'Financial year' (a dropdown menu), and 'Month' (a dropdown menu). A blue 'View' button is located at the bottom right of the form. The footer of the page contains the text '© 2025 -Comprehensive Pension Management System (CPMS)'.

### 4. Integration with Digilocker

This enhancement enables seamless integration between SAMPANN 2.0 (CPMS) and the national DigiLocker platform, allowing pensioners to securely access their key pension-related documents through the DigiLocker application.

Pensioners can access the following documents by using their PPO Number:

- Electronic Pension Payment Order (ePPO / EPPO ID Card)
- Gratuity Payment Order
- Commutation Payment Order

- Form 16

## 5. Integration with Umang

Unified Mobile Application for New-age Governance (UMANG) is a Government of India initiative that provides a single mobile platform for citizens to access Central and State Government services.

This enhancement enables the integration of SAMPANN 2.0 (CPMS) with the UMANG platform, allowing pensioners to access key pension-related services through the UMANG mobile application. The objective of this integration is to extend the reach of SAMPANN services, improve accessibility for pensioners, and promote digital service delivery through a unified government interface.

The screenshot displays the UMANG National Scholarship Portal website. The main banner reads "National Scholarship Portal is now LIVE on UMANG" and includes an "Apply Now" button. Below the banner, there are four data cards:

Departments/Entities		Services		Registrations	Transactions
Central	State	Central	State	Total	Total
80	160	872	1,518	10.15 Crores	722.37 Crores

At the bottom of the page, there is a "What's New?" section and a "Weather Alerts" section with the text "Get real-time All-india weather alerts from sachet."

## 6. Batch Division Module: Monthly Bill related improvements

6.1 The Batch Division Module is an enhancement to the existing Pension Disbursement Application (PDA) system designed to streamline and secure the monthly pension bill generation process. A functionality has been introduced for dividing pensioner records into batches to ensure efficient workload management and controlled data access. By

segmenting pensioners into batches and assigning them to specific DH users, the module prevents overlap, minimizes processing errors, and enhances accountability.

This feature provides complete batch lifecycle management - including creation, allocation, reallocation, and audit tracking - ensuring transparent and traceable pension disbursement operations.

## 6.2 Functionality

- Batch Creation:** PDA AO users can create new batches with relevant names and descriptions, assign DH users, and maintain a list of active batches.

The screenshot shows the 'Allot Batches to Dealing Hand (DH)' interface in CPMS. It features a table with the following data:

Batch Name	Batch Details	Filled Slots	Left Slots	Allotted DH	Action
Batch-01	nigh	0	1000	Unassigned	Assign
Batch-02	kjob	0	1000	Unassigned	Assign

Below the table, there is a 'Choose DH for allocation' dropdown menu with 'pddh1 - aji' selected and an 'Approve' button.

- Pensioner Allocation:** AO users can filter pensioners by category (IDA, CDA, Family, Normal) and allocate them to appropriate batches and DH users for processing.

The screenshot shows the 'Allot Pensioner to Batches' interface in CPMS. It features a table with the following data:

PPO Number	Name of Pensioned Family Pensioner	Type of Pensioner	DA Type	Type of Retirement
111992091108734	GANDA SARAN SHARMA	CDA	Normal	Superannuation
111992121100320	RAMESHWAR NATH SHARMA	CDA	Normal	Superannuation
801980091105559	SUMIT S HOODA	CDA	Normal	Superannuation
801980091108871	VINOD R NORMAL	CDA	Normal	Superannuation
801980091108880	JAHANGIR NORMAL	CDA	Normal	Superannuation
801980091117968	ANKUSH A FIVE	CDA	Normal	Superannuation
801980091108907	PANKAJ P SHARMA	CDA	Normal	Superannuation
801980091108870	SHALENDER P NORMAL	CDA	Normal	Superannuation
801980091117999	ANISH ANINE	CDA	Normal	Superannuation
801980091118004	ANANTA FOURTEEN	CDA	Normal	Superannuation

Below the table, there is a 'Choose Batch for allocation' dropdown menu with 'Batch-01 (nigh)' selected and an 'Approve' button.

- **Reallocation:** AO users can unassign and reassign pensioners between batches as needed to balance workload.
- **Access Control:** DH users can only view and process pensioners within their assigned batch, ensuring data segregation and security.
- **Audit Logging:** The system will maintain comprehensive logs for all allocation and reallocation actions to support traceability and audit requirements.
- **Integration:** The module is directly integrated with the **monthly bill generation system** to ensure that only batch-assigned pensioners are processed during billing.

**Batch creation and assignment is a one-time exercise at the AO PDA level. Subsequently, whenever new cases are onboarded onto SAMPANN, the AO PDA will only be required to assign those new cases to either existing batches or newly created batches, as applicable.**

## 7. Bill Generation

7.1 The generated bills will appear Batch Wise under the assigned DH PDA logins.

### 7.2 Process Flow

- Login as PDA AO.
- Select Pensioners to make a batch and then allocate it to a DH.
- Login as PDA DH.
- Click on the sidebar Action → Bill Generation → Monthly Bill Generation.
- Fill the mandatory fields.
- Select the Batch from the dropdown.
- Click on the Search button.

The screenshot displays the CPMS interface for 'Monthly Bill Generation For Normal Pension (CDA)'. The interface includes a sidebar with various navigation options such as Dashboard, Bill Payments, Non Pay Correction, Action, etc. The main content area features a form with the following fields: 'Financial year' (dropdown menu), 'Month' (dropdown menu), 'Batch' (dropdown menu), and 'PPO Number' (text input field). A 'Search' button is located at the bottom right of the form. The footer of the page indicates '© 2025 - Comprehensive Pension Management System (CPMS)'.

- The bill will be processed as it is done presently.

**All DHs PDA to whom batches are assigned must ensure to process the monthly bills.**