

User Manual for Transfer of Pension Cases Utility

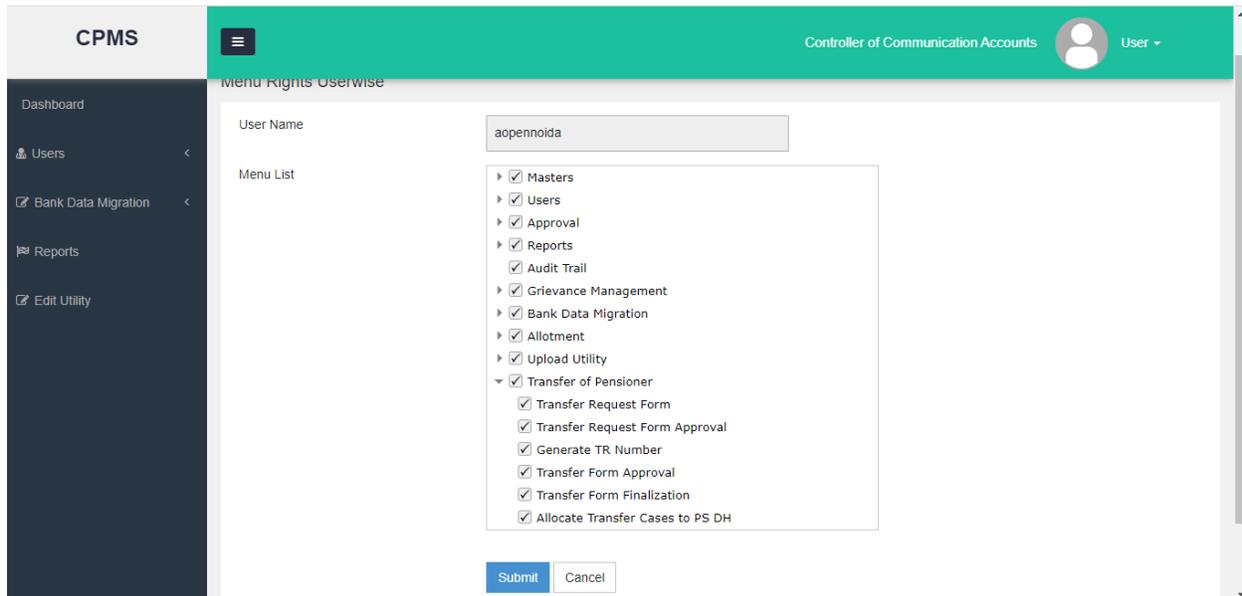
1. Introduction

At present pensioners/family pensioners whose pension is being disbursed via SAMPANN do not have the option to get their cases transferred to the circle in which they reside. In such a scenario it is possible that some pensioners/family pensioners face inconvenience not only in regular disbursement but also in circumstances in which revision of pension/family pension is required.

For the ease of pensioners/ family pensioners, the functionality for transfer of pension case from one to another CCA office has been developed in SAMPANN.

2. Role/Rights

First of all CCA user will login in the SAMPANN and will assign the role rights for submenu Transfer module which shown under Transfer of Pensioner menu to AOPension as shown in **Fig(1)**.

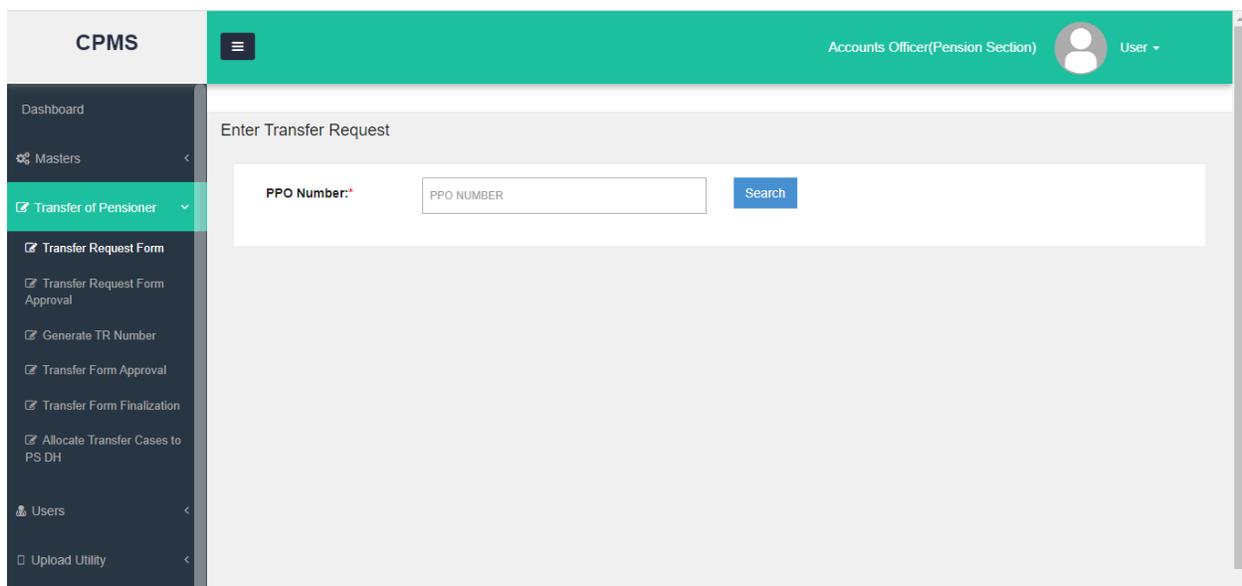


Fig(1)

3. AO Pension of Originating CCA Login

3.1 Transfer Request Form Generation

To generate the Transfer Request AO Pension of Originating CCA (which can be any of the CCA) will Go to->Transfer Of Pensioner ->Transfer Request Form. Enter the PPO no and click on the Search button shown in Fig(2).



The screenshot displays the CPMS web application interface. The top navigation bar is green and contains the text 'Accounts Officer(Pension Section)' and a user profile icon labeled 'User'. The left sidebar is dark grey and lists various menu items: 'Dashboard', 'Masters', 'Transfer of Pensioner' (highlighted in green), 'Transfer Request Form', 'Transfer Request Form Approval', 'Generate TR Number', 'Transfer Form Approval', 'Transfer Form Finalization', 'Allocate Transfer Cases to PS DH', 'Users', and 'Upload Utility'. The main content area is titled 'Enter Transfer Request' and features a form with a label 'PPO Number: *', an input field containing 'PPO NUMBER', and a blue 'Search' button.

Fig(2)

Once AO click on the search button a new page will open asking the detail of Pensioner. From here AO Pension will select the Residing CCA name (given by Pensioner) and upload the transfer request document and save the information shown in Fig(3).

CPMS Accounts Officer(Pension Section) User

Enter Transfer Request

PPO Number:* 802019121208342

Pensioner Name/Claimant Name: SAHDEV Pensioner Mobile/Claimant Mobile: 7686575643

Pensioner Address/Claimant Address: delhi Type of Retirement: Superannuation

Parent CCA:* Bihar Telecom Circle Residing CCA:* Rajasthan Telecom Circle

Originating CCA:* UP West Telecom Circle Upload File : Upload a file View

Cancel Reset Save

Fig(3)

3.2 Transfer Request Form Approval

Now AO Pension will Go to->Transfer Of Pensioner ->Transfer Request Form Approval. From here AO can see and take the print of Sanction by “View” link given in the grid under Detail column, in front of the record as shown in Fig(4). Now AO select the record and click on the Approve button and record will send to CCA User of Originating CCA.

CPMS Accounts Officer(Pension Section) User

Transfer Request Approval List

Status: Send for Approval

Show: 50

Name of Pensioner	Mobile No.	PPONumber	Details	Supporting Document	CCA Remarks
Mr. SAHDEV	7686575643	802019121208342	View	View	

Showing 1 to 1 of 1 entries

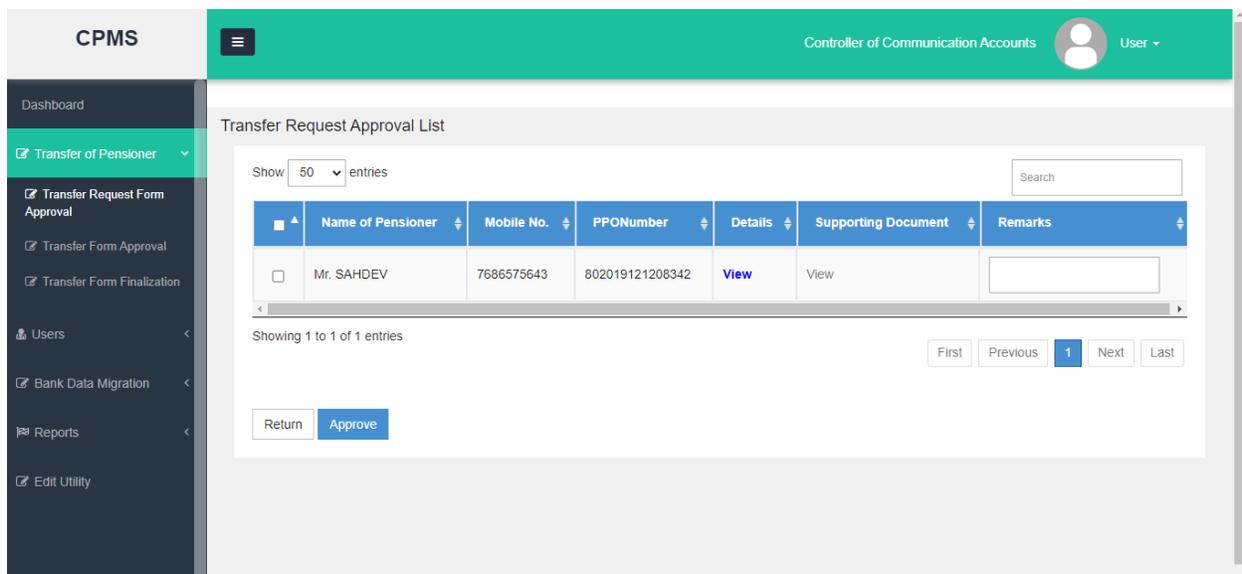
Delete Approve

Fig(4)

3.3 Transfer Request Form Approval (By CCA User)

In CCA login, CCA will Go to->**Transfer Of Pensioner ->Transfer Request Form Approval**. From here CCA view the Sanction by “View” link given in the grid under Detail column as shown in **Fig(5)**. Now CCA will fill the Remarks select the record and click on the Approve/Return button and record will send to **AO Pension of Residing CCA (as here the transfer request has been approved and will be lending on Residing CCA for further processing)**.

If CCA click on the Return button the record will send back to AO Pension of originating CCA for correction, here the AO would be correcting the application and resending it to CCA User OR if it has been an incorrect request, AO pension here can delete the complete application as requested from CCA User.



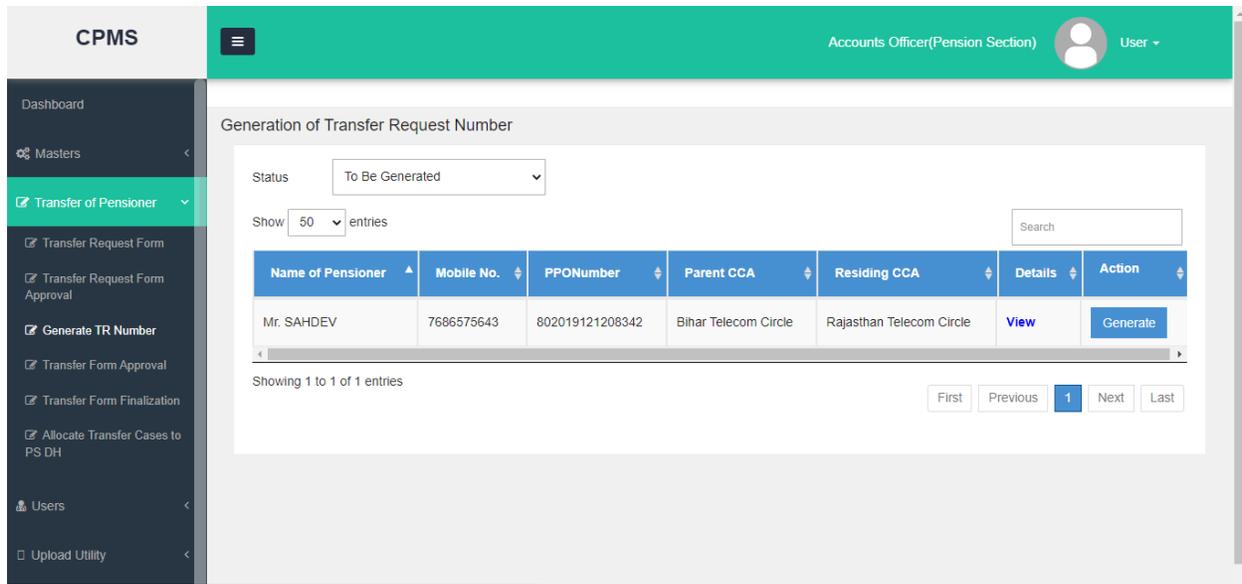
Fig(5)

4. AO Pension of Residing CCA Login

4.1 Generate TR Number by AO Pension

After the transfer request lending to Residing CCA (where the pensioner wish to transfer his/her case) following would be the processing of case:

In AO login, AO Pension will Go to->**Transfer Of Pensioner ->Generate TR Number**. From here AO can view the Sanction by “View” link given in the grid under Detail column as shown in **Fig(6)**. Now AO will click on the Generate button, by which TR Number will be generated.



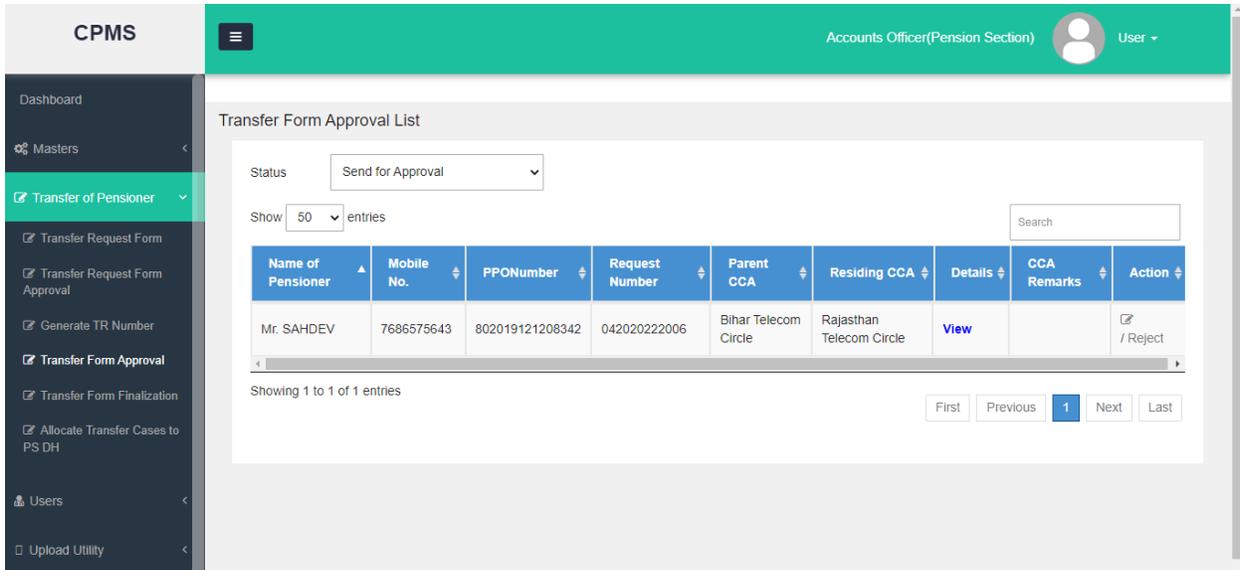
Fig(6)

Once Transfer Request number is generated, pensioner will receive a message on his/her registered mobile number and on his/her dashboard he/she will be able to see the transfer request from (auto generated). The pensioner will download , sign and send the form to Residing CCA's address. Here the pensioner will also have the option to cancel the request by selecting option and giving reason in the same transfer request form at his/her end. Based on this received form, AO Pension will take the further steps.

4.2 Send TR Number record for CCA Approval of Residing CCA

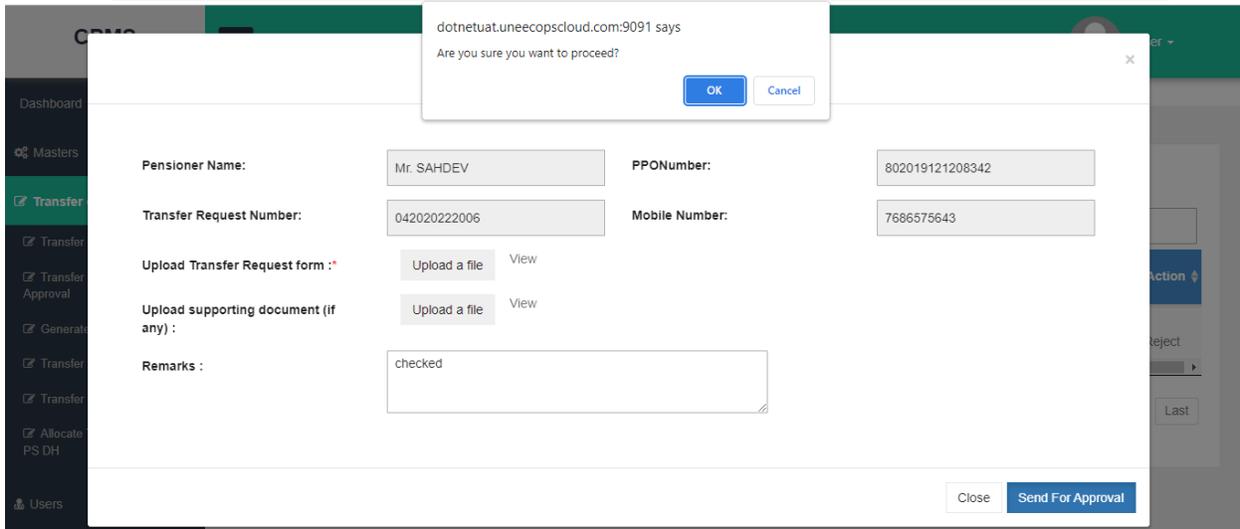
After AO Pension has received the signed transfer request form from pensioner, based on his/her selected choice (approved or cancel the application) the AO pension will proceed.

In AO login, AO Pension of residing will **Go to->Transfer Of Pensioner ->Transfer Form Approval**. From here AO can view the Sanction by **“View”** link given in the grid under Detail column as shown in **Fig (7)**.Now AO will click on the Edit button (Pencil icon).



Fig(7)

When AO click on the edit button a pop up window will open as shown in Fig(8). Here AO click on the **“Upload a file”** button to upload **“Transfer Request Form”** and **“Supporting Document”** (both submitted by pensioner) and click on the **“Send For Approval”** button and record will send to CCA of residing CCA for approval.

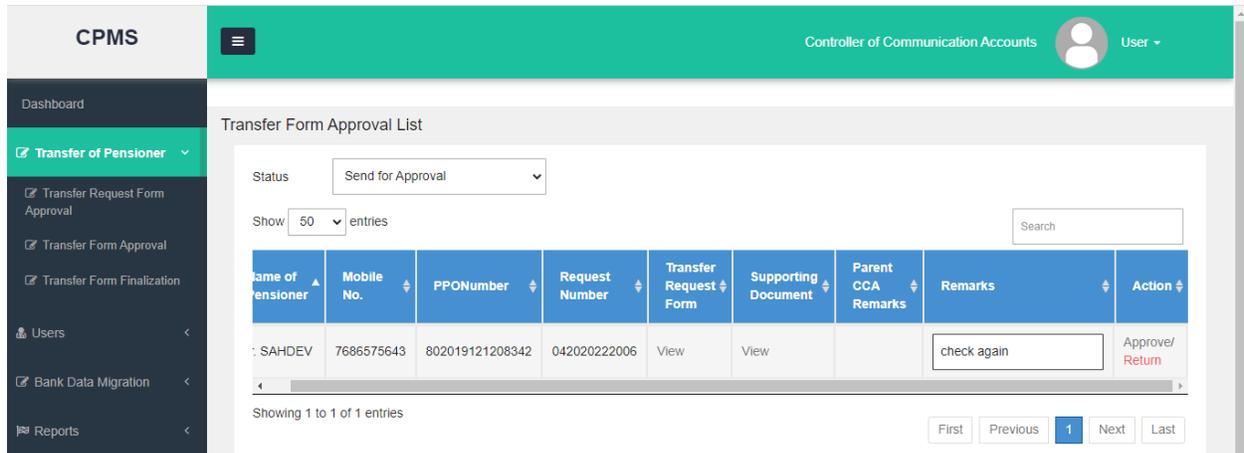


Fig(8)

4.3 CCA Approval of Residing CCA

In CCA login, CCA will **Go to->Transfer Of Pensioner ->Transfer Form Approval**. From here CCA can view the **Transfer Request Form** and **Supporting Document** submitted by pensioner by **“View”** link given in the grid under Transfer Request Form and Supporting Document column as shown in Fig(9). Now CCA will fill the Remarks select the record and click

on the Approve button and record will send to CCA User of **Parent CCA for final of transfer case**. If CCA click on the Return button the record will send back to AO Pension of Residing CCA for correction, where the AO can take according action.

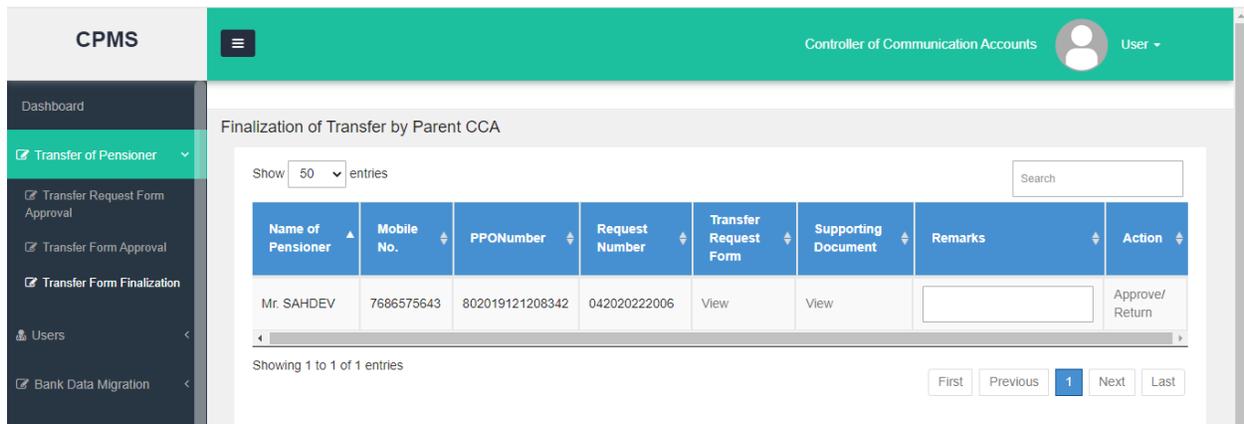


Fig(9)

5. CCA of Parent CCA Login

5.1 Finalization of form by Parent CCA

In CCA login, CCA will Go to->Transfer Of Pensioner ->Transfer FormFinalization. From here CCA view theTransfer Request Form and Supporting Document by“View” link given in the grid under Transfer Request Form and Supporting Document column as shown in Fig(10).Now CCA will fill the Remarks select the record and click on the Approve button and record will send to AO Pension of parent CCA. If CCA click on the Return button the record will send back to AO Pension of Residing CCA for correction, where it will be returned to AO Pension of residing for required corrections.



Fig(10)

5.2 AO Pension of Parent CCA for DSc

In AO login, AO Pension of parent will **Go to->Transfer Of Pensioner ->Transfer Form Finalization**.From here AO canview the**Transfer Request Form ,Supporting Document** and **Authority Letter** by “**View**” link given in the grid under Transfer Request Form and Supporting Document and Authority Letter column as shown in **Fig (11)**.Now AO will click on the Edit button (Pencil icon) to do the DSc.

Name of Pensioner	Mobile No.	PPONumber	Request Number	Transfer Request Form	Supporting Document	Authority Letter	Action
Late. JOGI RAM FAMILY		802020019208639	042020222003	View	View	View	View Details
Mr. SAHDEV	7686575643	802019121208342	042020222006	View	View	View	View Details
Mr. SHAHID KAPOOR	8077315175	802018116100224	042010222002	View	View	View	View Details
Mr. SHUBHAM IYYAR NORMAL	9494975623	802001051208573	042020222005	View	View	View	View Details
Mr. SUMIT K SINGH	9587625881	802020021108379	042010222004	View	View	View	View Details

Fig(11)

6. Mapping of cases to DH &AAO pension, by AO Pension of Residing CCA

After DSC by AO Pension Parent CCA , cases will transfer to the Residing CCA completely for any further payment. Here AO Pension of ResidingCCA will **Go to->Transfer Of Pensioner ->Allocate Transfer Cases to PS DH**.From here AO select the DH Pension and AAO Pension from the drop down list given in the grid in front of the record under “**Selection of DH PS**” and “**Selection of AAO PS**”columnshown in **Fig (12)**.Now AO select the record and click on the Approve button.

At the same time, the case will be mapped with AO PDA of Residing CCA.

CPMS Accounts Officer(Pension Section) User

Dashboard

Masters

Transfer of Pensioner

- Transfer Request Form
- Transfer Request Form Approval
- Generate TR Number
- Transfer Form Approval
- Transfer Form Finalization
- Allocate Transfer Cases to PS DH

Users

Allocation of transferred case to DH and AAO - Pension Section

Show 50 entries

Name of Pensioner	Mobile No.	PPONumber	Request Number	Transfer Request Form	Supporting Document	View Details	Selection of DH-PS	Selection of AAO-PS
Mr. ASHISH KUMAR	7867564534	802009121100067	042010222012	View		View	rajpendh1 - dhraj	aaopenraj - aaopenraj
Late. HAR CHARAN RAM SINGH		802014029200175	803020222022	View		View	rajpendh1 - dhraj	aaopenraj - aaopenraj

Showing 1 to 2 of 2 entries

First Previous 1 Next Last

Approve

Fig(12)

7. Allocation of case by AO PDA to DH PDA

After mapping of DH & AAO Pension by AO pension, case will move in to PDA Section of residing CCA to AO PDA. Case will be shown under- **Transfer Of Pension- Allocate Transfer Cases to PDA DH**. As shown in (Fig.13). Here AO PDA will assign the case to DH PDA. Also the Pension Transfer Sanction (DSCed) can be viewed under **View Details “View”**. **Fig. (14)**

CPMS Accounts Officer(Pension Disbursing Authority) User

Dashboard

Transfer of Pensioner

- Allocate Transfer Cases to PDA DH

Users

Upload Utility

LC & DLC Verification

Allotment

Grievance Management

Allot cases to Dealing Hand (DH)

Show 50 entries

Name of Pensioner	Mobile No.	PPONumber	Request Number	Transfer Request Form	Supporting Document	View Details
Late. HAR CHARAN RAM SINGH		802014029200175	803020222022	View		View

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

Choose DH for allocation

dhpdaccaraj - dhpd

Approve

Fig (13)



Government of India
Department of Telecommunication
O/o CCA, Bihar Telecom Circle,
Patna
2nd Floor, CTO Annex Building,
Patna - 800 001

PAN NO : XXXXXX Request NO : 803020222022
PPO Number : 802014029200175 Date : 22/02/2022

Order : Tranfer of Pension

Consequent upon the request of Transfer of Pension case, the case in the name of Late. HAR CHARAN RAM SINGH is transferred from CCA Bihar Telecom Circle to CCA Rajasthan Telecom Circle .

1. Details of Bank Account for disbursement of Pension is as-

a. Name : STATE BANK OF INDIA and UDHAM SINGH NAGAR b. Bank Name and Address :
35641102299 c. Account no. :
SBIN0009695 d. IFSC Code :

2. The payment of pension has been made upto the month of .

3. All future revisions and pension payments will be made by CCA Rajasthan Telecom Circle .

To

1. AO (PDA), O/O CCA, Bihar Telecom Circle . (For Information)

2. AO (PDA), O/O CCA, Rajasthan Telecom Circle . (For Further Payment of Pension and confirmation of payment/transfer (two copies))

3. AO Pension O/O CCA, Rajasthan Telecom Circle

4. Late. HAR CHARAN RAM SINGH N/A (For information and acknowledgement)

5. HoO (For information)

Authorised Signatory

Fig (14)

10. Generation of Monthly Bill at residing CCA- After receiving of transferred cases, monthly bill for such cases will be generated under respective pension category. Fig.(15)

CPMS Dealing Hand(Pension Distributing Authority) User

Dashboard
 CF Action
 LC & DLC Verification
 Grievance Management
 Investment Declaration
 PDA Utility
 Bank Data Migration
 Jeevan Pramaan
Reports
 Supplementary Bills
 Audit Trail

Monthly Bill Generation For Normal Pension (IDA)

Financial year : 2021-22 PPO Number :
 Month : February [Reset]

Fresh Return Edited D=O All

Show 10 entries

	Pensioner Name	PPO Number	IFSCCode/ SOL No.	Account No.	Basic Pension	Additional Pension	Commutation Pension	Reduced Pension	DR Rate	FMA	Arrear Amount	Total
<input type="checkbox"/>	Mr. NITIN H SRWA	802020012208424	SBIN0001103	34576556892	25000	0	0	25000	104.10	0	0	7100

Total number of record 1 First Previous 1 Next Last

[Regenerate Bills] [Save & Send for AMO Approval] [Export Bills in Excel]

Fig.(15)

11. Reports-

- a. **Transfer cases Report-** An MIS Report has been developed detailing the cases which have been transferred along with the names of the Parent CCA and the Residing CCA. Fig.(16)

Sl.No	Name Of Pensioner	PPO No.	DA Type (CDA/IDA)	Pension Type (Normal/Family)	Family Pensioner Name	Date of Raising Request	Transfer Requ
1	DINESH D KUMAR	802001051208560	IDA	Normal Pension		15/02/2022	041920222001
2	LAXMAN SURI NORMAL	802001051208572	IDA	Normal Pension		15/02/2022	
3	SHAHID KAPOOR	802018116100224	CDA	Normal Pension		15/02/2022	042010222002
4	JOGI RAM FAMILY	802020019208639	IDA	Family Pension	RAMAN	15/02/2022	042020222003
5	SUMIT K SINGH	802020021108379	CDA	Normal Pension		15/02/2022	042010222004
6	SHUBHAM IYAR NORMAL	802001051208573	IDA	Normal Pension		15/02/2022	042020222005
7	AJAI A FIFTEEN	801980091178005	CDA	Normal Pension		15/02/2022	
8	SAHDEV	802019121208342	IDA	Normal Pension		16/02/2022	042020222006
9	NATWAR FAMILY	801961119208613	IDA	Family Pension	HARSHITA	16/02/2022	042020222009

Fig.(16)

b. Impact on existing Reports-

- i) Monthly Bill Report
- ii) Pensioner Payment Report
- iii) Payment Summary Report
- iv) Payment Reconciliation Report
- v) Tax Related Reports

When with the help of PPO Number, details for the record will be fetched, and then the change will be reflected in CCA Name. As the payments made by a particular CCA will be shown with that CCA office name only.

CPMS Administrator User

Reports

Payment related Reports

- Other Bill Report
- Arrear Bill Report
- Arrear Payment Report
- Pensioner Payment Report
- Payment Summary Report
- Monthly Bill Report
- Payment Reconciliation Report
- DCRG & Commutation Payment Report
- Supplementary Bill
- Gratuity Withheld Report
- Pensioner Count Reconciliation Report
- Pensioner Revision Report
- Pensioner Paid(Two Contiguous Month)

Pensioner Payment Report

PPO Number: Pensioner Name:

From Date: To Date:

Show entries Search:

S.No.	CCA Name	PPO Number	Type Of Payment/Bill	Date Of Payment	Pensioner Name	Family Pensioner Name	Arrear	Gross Amount	IT	Cess	Recovery	Withheld	Net Amount
8	Rajasthan Telecom Circle	802020012208420	SUPPLEMENTARY BILL	24/02/2022	RAMESH S SAROHA		0.00	30000.00	12000.00	480.00	1700.00	0.00	15620.00
7	Bihar Telecom Circle	802020012208420	MONTHLY BILL	23/02/2022	RAMESH S SAROHA		0.00	2300.00	2000.00	80.00	0.00	0.00	220.00
6	Bihar Telecom Circle	802020012208420	MONTHLY BILL	18/12/2021	RAMESH S SAROHA		0.00	6003.00	2000.00	80.00	0.00	0.00	3923.00
5	Bihar Telecom Circle	802020012208420	MONTHLY BILL	02/11/2021	RAMESH S SAROHA		0.00	6003.00	2000.00	80.00	0.00	0.00	3923.00
4	Bihar Telecom Circle	802020012208420	MONTHLY BILL	04/10/2021	RAMESH S SAROHA		0.00	6003.00	2000.00	80.00	0.00	0.00	3923.00
3	Bihar Telecom Circle	802020012208420	MONTHLY BILL	28/09/2021	RAMESH S SAROHA		5000.00	6003.00	2000.00	80.00	1000.00	0.00	7023.00

Important Notes-

- All pension related data will also be transferred to the Pension Section of CCA Office in the Residing CCA.
- All future revisions will be initiated and processed by the Pension Section of CCA Office in the Residing CCA.
