

**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.
- 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.

Role of 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

- 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.
- 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

Establishment
Section

Operator

