1. To Enter Memo No. Click Generate button

Pic : 2.28

2. Click 'Generate Report' to Generate Provisional Report

Pic : 2.29

3. Click 'Extend Provisional' to Extended Provisional Pension. Then save and Approve the process.

Pic: 2.30

After successfully complete the process it is still shown in the 'Inbox for Pending Workflow' section as because it is pending for next process. Until the whole process is not complete it remains showing in 'Inbox for Pending Workflow'.

➢ Now we are discussing about the Retirement type of '*Compassionate Allowance*', '*Interim Allowance*' and '*Provisional Pension (Departmental Case Pending)*'.

1. First tab in this section is Pensioner's Details. User need to enter all the details of the employee and always save it before close.
2. Pension Payment Jurisdiction:
The user needs to choose Pension Payment Jurisdiction from three options. i.e. 'Payable through Bank', 'Payable through Treasury',' Outside WB'.

o If user choose Payable through **Bank**, then bank details needs to fill up. It is also available in next tab. For Bank Jurisdiction this Bank Information is mandatory.

o If the user selects Payable through **Treasury**, the user needs to choose the Treasury name from the LOV.

o If User Choose '**Outside WB'** user needs to choose District name from LOV and put the treasury name available that district in the adjacent text field.

3. <u>Commutation Desired / Commutation (%) :</u> To Apply Commutations user needs to choose Commutation Desired "Y". This has to enter the Commutation (%). Maximum Commutation Percent depends on the ROPA of that Employee.

4. *<u>Any previous commutation pension application / Remarks :</u>* If Employee has any previous commutation pension application then choose 'Y' and put the Remarks.

5. <u>Provisional Pension Received / Remarks</u>, <u>Provisional Gratuity Received / Remarks</u> : If Employee applied Provisional Pension then this filled will not be modified and automatically populated by System. Amount will come in the remarks field. Otherwise user can choose this. If User choose 'Y' then Remarks is mandatory.

6. <u>Any other pension Received</u>: If Employee Received any Other Pension then chooses "Y" then filled Pension Name, Particulars and Source.

7. <u>Whether appointment is made on ad-hoc basis / Remarks</u> : Whether appointment of the Employee is made on ad-hoc basis Pension then choose "Y".

8. <u>Any Previous Appearance before medical authority/ Remarks</u> : If Employee have Any Previous Appearance before medical authority then choose "Y".

9. <u>Court Case(Departmental/Criminal) pending</u>: This option is by default ''Y'' and User cannot change this.

<u>Pic</u>: 2.31

Court Case(Departmental/Criminal) pending: *   ● Y ○ N

Case Type: * | Select Case Type ▼ |

Select Case Type
Departmental Proceedings
Judicial Proceedings-criminal proceedings involving moral turpitude
Judicial Proceedings-criminal proceedings without involving moral turpitude

Remarks: *   Misconduct or inefficiency

Vigilance Case p

✓ In case of **"Interim Allowance"** Case Type:-

a. Departmental Proceedings

b. Judicial Proceedings-criminal proceedings involving moral turpitude.

c. Judicial Proceedings-criminal proceedings without involving moral turpitude.

✓ In case of **"Compassionate Allowance" ,** Case Type:-

a. Judicial Proceedings-criminal proceedings involving moral turpitude.

b. Misconduct or inefficiency

o If <u>Case Type</u> is **Departmental Proceedings**: (Interim Allowance)

o If <u>Case Type</u> is **Misconduct or inefficiency**: (Compassionate Allowance , Interim Allowance): User has to put Case Type(text box),Court case No, Court case Year, Name o of the Court, In Relation to and Remarks. Case type automatically is selected as '**Pending'** for 'Compassionate Allowance'.

Pic: 2.32

Court Case(Departmental/Criminal) pending: *   ⦿ Y   ◯ N

Case Type: *   [Judicial Proceedings-criminal proce▾]

Case Type: [_____]   **Court Case No:** [_____]   **Court Case Year:** [_____]

Name of Court: [_____]

Case Status: [Pending ▾]   **In Relation to:** * [Select Case Relat ▾]

Remarks: * [_____]

- o If <u>Case Type</u> is **Judicial Proceedings-criminal proceedings involving moral turpitude**: (Interim Allowance): User has to put Case Type(text box),Court case No, Court case Year, Name of the Court, In Relation to and Remarks. Case type automatically is selected as '**Pending**' for 'Compassionate Allowance'.
  - o If <u>Case Type</u> is **Misconduct or inefficiency**: (Compassionate): User has to put Remarks.

10. <u>Vigilance Case pending</u> : If Employee's Vigilance Case pending then choose "Y".
11. <u>Retirement Time</u>: has to be selected as desired.
12. <u>Employer/PSA Code Number</u>: Enter Employer/PSA Code Number. It is a mandatory Filed.
13. <u>Name of the treasury with which PSA is attached</u> : If the Service book- HOO of the Employee tagged with only one DDO then the Treasury attached with that DDO will be selected automatically by system. No LOV will come in this case. But if that HOO tagged with multiple DDO then user has to select the right treasury from the LOV which contains the treasury tagged with the attached DDOs'. Otherwise if that HOO *tagged with No DDO this LOV will show all treasuries.*
14. <u>Family Pensioner Employed</u>: has to be selected as desired.
15. <u>Family pensioner received any other pension/family pension</u>: has to be selected as desired. If 'Yes' then enter PPO No, PPO Details and Remarks.
16. <u>Pensioner's Present Address</u> / <u>Pensioner's Permanent Address</u> : will be prepopulated by System as available in Employee Master.
17. <u>Pensioners Communication Address After Retirement</u>: choose as desired. If this address is other than Present / Permanent then user has to enter all details.
18. <u>Enrollment under West Bengal Heath Scheme</u> : will be prepopulated by system as available in Employee Master. If this is 'Yes' then user has to select 'Heath Scheme Benefit After Retirement'.
19. <u>Member Of GPF</u> : will be prepopulated by System as available in Employee Master. If 'Yes' GPF No will be prepopulated by system as available in Employee Master. If 'No', CPF No will be prepopulated by system as available in Employee Master and then 'CPF Remarks' has to enter.
20. <u>Details Of User To Whom Employee Is Tagged</u> :   will be prepopulated by system.
21. Has to tick the <u>declaration</u>. Otherwise system will not get saved.

Step 7: In the next Tab User can save Employee Bank details. But this is not mandatory other than Bank jurisdiction.

Step 8: In the next Tab User can see Employee Family details, please note this information of family is fetched from Employee Master, all approved data in Employee Master will be fetched. Any family details insertion or modification can only be done from Employee Master only.

Step 9: After this page Nominee Details tab will come. The Nominee data which is approved in Nominee Declaration form will be fetched here. Insertion or Modification cannot be done from here.

Step 10: After this page Family Pensioner Details page will come. The data which is approved in Family Pension declaration page will be fetch here. Insertion or Modification cannot be done from here.

Step 11: It is the last stage. Here any documents user attached in the Previous Attachment process will be shown. Also previously attached file can be downloaded from here.
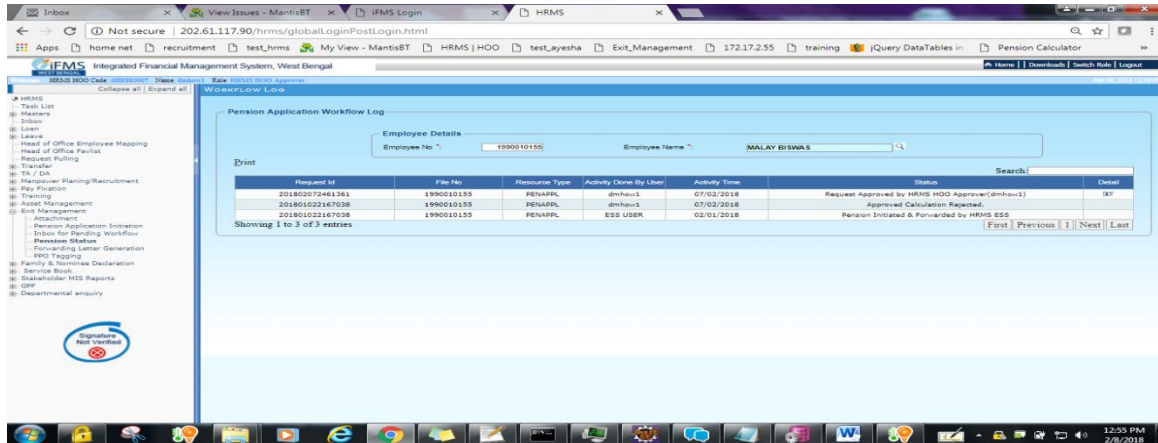
After completed all the required stages the Process needs to approve by HOO approver. After approval a successful message will displayed. Once the process is approved it cannot be modified, user needs to reject the whole process if any correction needed after approval.

- **Pension Status:**

All the Process of the employee in total Employee Exit Management module is completed pending or not yet is available here with respective request ids. Anyone can view or check the progress from particular pension process from here and also can check the status with user id with step by step and also print that status .

Menu Navigation: HRMS → Exit Management → Pension Status

Pic 3.0

END