

Role of HoO/DH/Individual employees and step by step procedure for processing of pension cases through SAMPANN

1. **Creation of HoO and DH:** HoO will be created by the office of the concerned CCA based on details furnished by SSAs/Circles/Corporate Office and ID/Password of the HoO will be communicated to the concerned officer. HoO will create login for DHs in the portal and communicate the Id/password to them.
2. **Creation of Retiree Profile in SAMPANN:** DH will log into the portal and check the details of the retirees. If the DH finds that any employee in the list of retirees displayed does not belong to his / her circle or the retiree details are not correct, he/she should immediately inform the respective circle CCA office.
3. **Service Book verification:** DH will submit the 'service book verification Form' to HoO through portal for acceptance. Before submission of the Form, he / she should satisfy himself/herself that the service book is updated and necessary action has been taken in respect of objections raised by o/o CCA, if any. HoO will either approve the cases or return to the DH with remarks for correction in the unverified period mentioned. After this retiree login will get created.
4. **Login by retiree:** After approval of Service Book Verification Form by HoO, the retiree will be provided with access to the portal. Default user Id for the purpose will be the PAN of the retiree as available in ERP. Password will be communicated to the retiree through SMS to his mobile no. available in ERP.
5. **Filling up and Submission of Pension Papers by retirees:** After the DH has sent the Form to retiree, the retiree will fill up the relevant details in the Forms online and save the filled up Forms in the system. Before submission of the Forms, the employee is to ensure that all the relevant details are correctly filled up. Some of the details in the Forms will be pre-filled and non-editable. In case any discrepancy/ error is noticed in the pre-filled details, the same should be brought to the notice of the DH immediately.
6. **Uploading of documents in SAMPANN by the retiree:** For filling up and submission of Forms, the retiree would require to upload scanned copy / image of the following documents:
 - i) **Joint photograph with spouse**
(Colour) (height- 4.5 cm, width- 7 cm) (Format: jpeg/jpg/png) (Max size: 70 kb)
 - ii) **Single Photograph (Self & Spouse)**
(Colour) (height- 4.5 cm, width- 3.5 cm) (Format: jpeg/jpg/png) (Max size: 70 kb)
 - iii) **Specimen signature of retiree** (Format : .pdf/.jpeg) (Max size: 70 kb)
 - iv) **Bank Undertaking cum Mandate duly filled up and signed by the bank of the retiree:** The Undertaking cum Mandate should be in the prescribed Form and duly filled up and signed by the bank in which the retiree opened the joint account for drawing pension.

Contd.2/-



