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/jpg) (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.
7. Submission of Physical copies of Forms and documents by the retiree: After filing up the Forms and uploading of requisite documents, the retiree will take print out of the Forms from the system and immediately submit signed print outs along with following documents in triplicate:

i) Joint colour photograph with spouse (3 copies) (height- 4.5 cm, width- 7 cm)
ii) Single Photograph (Self & Spouse) (Colour) (height- 4.5 cm, width- 3.5 cm)
iii) Descriptive Roll duly countersigned by Head of Office
iv) Specimen signature of retiree duly countersigned by Head of Office
v) Self attested copy of PAN Card (Self & Spouse)
vi) Self attested copy of Adhaar Card (Self & Spouse), if issued
vii) Cancelled cheque of the joint bank account opened for drawing pension
viii) 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.
ix) Form-5, Form-3, Form-1 and Form A generated by SAMPANN duly signed by retiree.

8. Scrutiny and verification of filled up Forms of retirees by DH: Forms and documents uploaded by retiree will be available to DH for viewing and acceptance. DH will check that the Forms received are correctly filled up and that all scanned documents are of good quality. Then after receipt of hardcopies (duly signed by the retiree) DH will cross verify the details with service book and check whether all enclosures have been duly attached. If the Forms are found to be correctly filled up and complete in every respect, DH will forward the case to HoO for approval.

In case any error or discrepancy is noticed, DH will return the Forms to the retiree along with necessary remarks for correction. After the Forms are resubmitted by the retiree, the DH will check the Forms and forward to HoO for approval if found correct.

9. Approval of Forms by HoO: The HoO can either approve the cases or return to the DH for re-verification / correction along with appropriate remarks. If approved, the cases will move to Form 7 under DH’s login.

10. Countersigning of Hard copies and documents: After the case is approved by HoO, the Forms / enclosures will be countersigned by the competent authority and process for preparation of Form 7 will be initiated.

11. Preparation of Form -7: Form 7 will be prepared by DH after the case is approved by HoO and Forms / documents are countersigned by the competent authority. Some columns in Form 7 will be pre-filled. Remaining columns are to be filled up by DH. DH will submit the completed Form 7 to HoO for approval.

12. Approval of Form 7 by HoO: HoO will either approve or return Form 7 for correction with appropriate remarks. DH will resubmit returned cases after necessary corrections.

Contd. 3/-
13. **Form -8**: Nil Form 8 will be automatically generated by the system. DH / HoO will be able to view it at the ‘Send to PAO’ stage.

14. **Forwarding of Forms to CCA (Send to PAO)**: After Approval of Form 8 by HoO, DH will once again check the Forms and attachments and send to HoO for submission of case to concerned CCA. HoO will approve and forward the case to CCA.

15. **Submission of Hard Copies of Forms/ documents and Service Book to CCA**: After the case is submitted online to CCA, the competent authority will ensure that the Hard Copies of Forms/ documents and Service Book along with are submitted to CCA immediately. It may be ensured that the VRS acceptance order is pasted in the service book along with necessary entry in the service book. **Before submission of Hard Copies and Service Book to the CCA, it must be ensured that all objections / remarks made by the O/o CCA have been acted upon and necessary corrections / entries are made in the service book.**


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