System for Accounting and Management of Pension (SAMPANN)

COMPREHENSIVE PENSION MANAGEMENT SYSTEM

Handbook for Retiree

Version: 1.1

Tuesday, July 9, 2019
### Document Version

<table>
<thead>
<tr>
<th>Sl. No.</th>
<th>Version</th>
<th>Release Date</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1.0</td>
<td>2-6-2019</td>
<td>First version of Handbook for retirees</td>
</tr>
<tr>
<td>2</td>
<td>1.1</td>
<td>18-6-19</td>
<td>Some modification made in handbook</td>
</tr>
</tbody>
</table>
Executive Summary

SAMPANN is an initiative undertaken by the Controller General of Communication Accounts (CGCA), Department of Telecommunications. SAMPANN or “System for Accounting and Management of Pension” is the brand name for Comprehensive Pension Management System (CPMS) vide which direct disbursement of pension to Telecom pensioners is being carried out by Department of Telecom via CCA (Controller of Communication Accounts) offices. It is a seamless pension processing system through integrated software, which would bring the processing, sanctioning, authorisation and payment units under a common platform.

SAMPANN has been rolled out PAN India after inauguration on 29.12.18 by Hon’ble Prime Minister. Rolled out in four phases, SAMPANN has been rolled out PAN India by 24.5.19.

Benefits for pensioners

I. Direct disbursement of pension on timely basis without intermediaries
II. Single window system for complete pension process
III. Online grievance management for the pensioners reducing paper work
IV. Tracking of pension status from home encourages transparency and accountability
V. Faster processing of arrears and revision of pension

This document aims to explain the features available on SAMPANN Portal on the pensioners Dashboard with the intention to increase transparency and accountability in the system. Also, it aims to reduce the dependency on physical documents by taking documentation to the online platform.
# Table of Contents

Document Version ................................................................................................................. 1
Table of Contents .................................................................................................................. 3
Definitions and Acronyms ....................................................................................................... 4
1.1 SAMPANN ....................................................................................................................... 5
1.2 Logging into CPMS .......................................................................................................... 5
1.3 Retiree Dashboard ........................................................................................................... 6
1.4 Fill & Submit Forms ....................................................................................................... 7
  1.4.1 Pensioners Details .................................................................................................... 7
1.5 Updation of Mobile, Email and address ........................................................................ 13
  1.5.1 Mobile Number Update .......................................................................................... 14
  1.5.2 Email ID Update ...................................................................................................... 15
  1.5.3 Address Update ........................................................................................................ 16
1.6 Lodge Grievance ............................................................................................................ 17
1.7 View documents and Ledger ......................................................................................... 18
1.8 Process of DLC Generation ............................................................................................ 19
1.9 Document Submission in case of death after retirement .............................................. 23
# Definitions and Acronyms

<table>
<thead>
<tr>
<th>Abbreviation / Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAO</td>
<td>Assistant Account officer</td>
</tr>
<tr>
<td>ACCA</td>
<td>Assistant Controller of Communication Accounts</td>
</tr>
<tr>
<td>AO</td>
<td>Accounts Officer</td>
</tr>
<tr>
<td>CCA</td>
<td>Controller of Communication Accounts</td>
</tr>
<tr>
<td>CGCA</td>
<td>Controller General of Communication Accounts</td>
</tr>
<tr>
<td>DH</td>
<td>Dealing Hand</td>
</tr>
<tr>
<td>DSC</td>
<td>Digital Signature Certificate</td>
</tr>
<tr>
<td>HoO</td>
<td>Head of Office</td>
</tr>
<tr>
<td>LPD</td>
<td>Last Pay Drawn</td>
</tr>
<tr>
<td>M / BDR</td>
<td>Month / Before Date of Retirement</td>
</tr>
<tr>
<td>PAO</td>
<td>Pay &amp; Accounts Office</td>
</tr>
<tr>
<td>PDA</td>
<td>Pension Disbursement Authority</td>
</tr>
<tr>
<td>PFMS</td>
<td>Public Financial Management System</td>
</tr>
</tbody>
</table>
1.1 SAMPANN

SAMPANN or “System for Accounting and Management of Pension” - the brand name for Comprehensive Pension Management System (CPMS). CPMS is a web portal for Pension Processing, Direct Disbursement, Accounting and Auditing of Pension and Pensionary Benefits to Pensioners of Department of Telecommunication. It has been designed with the following objectives:

- Direct Credit of pensionary benefits and pension to Pensioners’ Bank Account.
- Bringing greater transparency in processing of pensions.
- Reducing delays in disbursement of pension and arrears of pension.
- Digitization of forms and streamlining in HoO and CCA offices to reduce time and effort.
- Optimum utilization of resources in processing and disbursement of pension.
- Providing timely updates and alerts to the Pensioners.
- Creating a platform for direct interaction with pensioners for serving them better.
- Improving the quality of service through consistent and standardized work programs.
- Creating a faster and more responsive online grievance registration and redressal system.
- Providing real time MIS to CCA and senior officers of DoT and Controller General of Communication Accounts (CGCA).

1.2 Logging into CPMS

Pensioner have to take following steps in order to login in to CPMS application.

1. Enter URL www.dotpension.gov.in in web browser to go to login screen(Fig 1.1)
2. Enter User Name. Username has been sent to pensioners via SMS along with Password. For further help, one may call the national Helpline 1800-113-5800 or mail his grievances/query to sampann.cpms-dot@nic.in.
3. Enter Password.
4. Enter Captcha.
5. Click on Login button.

It may be noted that there will be no change for the Telecom Pensioners drawing pension from Banks/Post offices and they will continue in the current system till order for migration is issued. The existing pensioners will be migrated to the new system followed by announcements and proper intimations. Such Pensioners will not be able to access the dashboard till migration.
1.3 Retiree Dashboard

- Retiring officer/official can see the progress of his/her application at the top of the dashboard till pension Authorisation. (Fig 1.2)
- Milestones completed will be shown in GREEN colour dots and the pending ones with RED colour dots.
- Retiree can see the pensionary benefits and lodge their grievance, if any, using the dashboard.
- Retiree can see his/her pension details by clicking on pension ledger.
1.4 Fill & Submit Forms

Retiree can fill the forms by following the following steps. It may be noted that currently the forms are being filled by CCA offices on behalf of the pensioner based on physical documents submitted by him/her. Once BSNL offices are brought on board and they start using online system and retiree can fill/submit their forms online.

1.4.1 Pensioners Details

- Click on Pensioners Details >> Profile.

- Few details will be pre-populated in the profile of the retiree and rest of the details will be filled by the retiree (in case there is any discrepancy in the pre-populated details of the retiree, he/she may write to CCA and get the same rectified).

**Personal Details Tab:**

- Click on Personal Details Tab and fill the same. After filling the same click on Save button and move on to next tab ‘Commutation and FMA’. Fig 1.3
Commuation and FMA Tab:

In this tab user will fill the FMA and Commutation details. The commutation percentage can be maximum 40%. Fig 1.4

In case FMA is applicable, retiree needs to select his/her area of residence as CGHS or non-CGHS. Other requirements may also be filled in.

Family Details Tab:

- Retiree will fill information about his/her family members in this tab.
- Then the Retiree should fill the nominations, alternate nominees etc. and keep clicking save button to move on to the next tabs. Fig 1.5
- The Retiree should NOT fill his/her own details in this tab.
Nomination Form 1: Fig 1.6

Fig 1.6
Nomination Form A Fig 1.7

Bank Details Tab:

Retiree will fill the bank details in this tab. He/she should be careful while entering these details as this is important information for the pension disbursement. Fig 1.8

- After filling the bank details, bank undertaking will be printed (button provided on screen as Print Bank Undertaking). Pensioner will himself/herself sign the same and also get signed from bank authorities. Retiree will then upload the signed Bank Undertaking on CPMS (upload a file).
Fig 1.8

**IMPORTANT:** Pensioner profile prompts the pensioner to enter bank details. The pension and pensionary benefits of the pensioner will be credited into this account. Therefore, due diligence should be exercised while filling in all important fields like Bank Account no., IFSC code etc. After required, correct information is filled, Bank Undertaking has to be printed and physically signed by Bank authorities and Pensioner, and then uploaded on CPMS.

**Check List Tab:**

The Retiree will fill the Check List as per the criteria and scenarios. SL. No. 2, 7, 9 cannot be NO. Retiree need to fill them carefully. Fig 1.9

*Click on ‘Final Submission ‘tab whereupon the case will be finally saved.* Once finally submitted, the retiree will not be able to change the data. Hence the details should be thoroughly checked before submission. Fig 1.9
The Retiree shall take print out of the forms-form 5, form 3, Nomination forms and Form 1A-and after signing duly submit them with enclosures as mentioned in the checklist of form 5 to HoO. **Currently, the forms will continue to be submitted and filled in physical form as mentioned earlier.**

1.5 Updation of Mobile, Email and address

For updating mobile number, Email or Address of a pensioner after finalisation of retirement benefits, following process will be followed.

After login, click on the profile picture and select the option “Edit Profile” (Fig(1.10)).

![Fig (1.10)](image)

A Pop-up window (Fig(1.11)) will be displayed with the option to choose the following details which the user wants to edit or change:
1.5.1 Mobile Number Update

Upon selecting ‘Mobile Number’, the following screen will be displayed (Fig (1.12)).

Retiree can enter his/her mobile number and then select either his/her registered email ID or the entered mobile number to receive an OTP to verify the number (Fig (1.12)). Upon
receiving the OTP, retiree should enter the OTP (Fig (1.13)) and save which will then update the mobile number.

![Image](image1.png)

**Fig (1.13)**

### 1.5.2 Email ID Update

Upon selecting ‘Email ID’, the following screen will be displayed (Fig(1.14))

![Image](image2.png)

**Fig (1.14)**

Retiree can enter his/her new email ID and the click on generate OTP which will then send an OTP to the registered mobile number (Fig (1.14)). Retiree should then enter the OTP received and click on save (Fig (1.15)) which would then update the email ID.
1.5.3 Address Update

To update address, pensioner would be taken to the pensioner grievance page where a grievance related to updation of address can be registered (Fig (1.16)).

Once such a grievance has been registered, it will be assigned to the respective DH who will then update the address. Uploading of proof of address is mandatory in such case.
1.6 Lodge Grievance

- Retiree can login and raise his/her Grievance related to pension, if any. **Retiree Login ➔ Pensioners detail ➔ Grievance.**
- Retiree can select the Grievance Type from the dropdown and add the description about it. (Fig 1.17)

![Fig 1.17](image)

- Retiree can also upload the attachment related to the Grievance, if any. (Fig 1.18)
- After filling all the details, Retiree will click on **Submit** button. (Fig 1.19)
Retiree shall be able to track the status of his grievance from grievance history. (Fig 1.19)

1.7 View documents and Ledger

Retiree can access ePPO and DCRG sanction along with ledger at any point of time. Also, he can access any corrigendum/revision authority on his dashboard as well along with details of payment of commutation. (Fig 1.20). Also Pensioners can view the monthly pension paid along with arrear paid financial year wise. It may be noted that the first pension will reflect in the ledger in arrear column. Ledger can be downloaded as well for further use.
1.8. Process of DLC Generation

**Digital Life Certificate or Life Certificate**

Pensioner will be required to submit the physical life certificate or digital life certificate within one year of last submission. In case of fresh retiree, 1st LC/DLC shall be submitted within one year of date of retirement.

**Life certificate**

In case Pensioner opts for Physical Life Certification, then Life certificate in prescribed form shall be submitted by Pensioner in CCA office. **In case where physical life certificate is submitted by the pensioner signed by Authorities as mentioned in rule 343 of central treasury rules(CTR), the physical Presence shall be exempted and the same can be delivered through Post/Hand to Concerned CCA office.**

**Digital Life Certificate(DLC)**

For submission of DLC, following process may be followed. Digital life certificate can be generated at Banks/ Post Offices which have Jeevan Pramaan Facility. In addition, the Pensioners Service Centre at SSAs, Pensioners’ Lounge at CCA Offices, banks and CSCs(Customer Service Centres) will facilitate online submission of Digital Life Certificate for the pensioner and the same can be delivered through Post/Hand.

For submission of DLC, the pensioner requires to be physically present to generate Biometric verification, and provide the PPO/Mobile number/Aadhaar Number at the CCAs/ Pensioners Service Centre/ Banks /HPOs/ CSCs/ Aadhaar centers for completing the following procedures:
Step 1: The pensioner’s Aadhaar Number and Mobile number is to be entered in the online application form after which the pensioner receives an OTP (Fig. 1.21) which is to be fed in the system (Fig. 1.22).

![Fig 1.21](image1.png)

![Fig 1.22](image2.png)

Step 2: If correct OTP is entered, following screen is displayed. On next screen (Fig. 1.23), enter mandatory information like Pensioner Name, PPO Number, Type of pension, name of Sanctioning Authority, Disbursing Agency, email and Bank Account number etc.
In above screen, currently for pensioners who are drawing pension via CPPCs, sanction authority is **TELECOM**, Disbursing Agency is **Bank** and Agency is the **Bank name-SBI**.

However, in **SAMPANN**, where pension is directly disbursed by CCA office- sanction authority will be **TELECOM**, Disbursing Agency will be **Department of Telecommunication**, and Agency is the **CCA ABC. (Name of CCA which has issued the PPO)**

Step 3: Check small grey box as shown below (Fig.1.24). Then click 'Scan Finger’ button & this will start the finger/Iris scanning process.
Step 4: Once the Finger Print/Iris Authentication is successful, the life certificate of the pensioner is displayed as shown below, (Fig 1.25) and an SMS acknowledgement is sent to the pensioner’s mobile number. This SMS has Jeevan Pramaan Certificate ID. The generated certificates or DLCs are stored in the Life Certificate Repository and is available anytime & anywhere for use by pensioner & Pension Disbursing Agency (Bank/CCA as applicable).

Once the certificate is generated, the Jeevan Pramaan ID is sent in a SMS to the pensioner for further use (print). The Digital Life Certificate or the Jeevan Pramaan will be
electronically delivered to the Pension Disbursing Agencies and pensioner is not required to submit any physical copy in this case.

1.9 Document Submission in case of death after retirement

After the death of pensioner, if the claimant’s name is mentioned in the PPO, then in such case, documents that will be required to be submitted, to AO PDA in Concerned CCA office, shall be

1. Death certificate of Pensioner(s)
2. Life certificate/DLC of the claimant
3. Revised Mandate form/cancelled cheque and undertaking.

After the death of pensioner, if the claimant’s name is not mentioned in the PPO. In such case, revision shall be initiated after form 14 with enclosure is duly forwarded by HOO along with sanction of payment.

Documents that will be required to be submitted in this case shall be

1. Death certificate of Pensioner(s)
2. Life certificate/DLC of the claimant
3. Mandate form/cancelled cheque and undertaking
4. Duly filled form 14 with enclosures.

In case of permanently disabled children/siblings whose name is mentioned in PPO, form 14 shall be required to be submitted to the Pension/PDA directly and no fresh sanction shall be called for.

A declaration shall be obtained half-yearly from all recipients of family pension whose pension is terminable on their marriage or remarriage. However, in case of widow recipient of family pension, such declaration will be obtained only on the 1st occasion with an undertaking to report promptly to the PDA in the event of her remarriage. Son/Unmarried daughter (including widowed/divorced daughter) receiving family pension should furnish six monthly certificates in regard to his/her marital status.

******************************************************************************