

**MEMORANDUM**

Subject : **Modified Procedure for application, process and disposal of pension cases of the Employees of the non-Government aided and Recognised Educational Institutions (Excluding D.A. getting schools) through e-Pension Portal**

The Governor is hereby pleased to direct that in view of the various e-Governance initiatives undertaken by the Government it has been felt that benefit of such e-Governance initiatives may also be extended to the process of settlement of pensionary benefits to the employees of non-Government Educational Institutions.

After careful consideration of the matter, the Governor is now pleased to lay down the following procedure to be followed by the concerned stakeholders in the 'e-Pension' portal of Govt. of West Bengal and settlement of pensionary benefits of the employees of the State Government Sponsored or Aided Educational Institutions (Excluding D.A. getting schools).

The portal is designed to minimize the physical movement of voluminous papers related with the pension cases and also to minimize the time consumed in examination, audit and finalisation of the pension cases under the existing scheme for payment of retirement benefits to the employees of non-Government Aided and recognized Educational Institutions (excluding D.A. getting schools) in due time. Every individual pensioner, Head of the Institution/Sub Inspector of school (PE), District Inspector of Schools (Primary Education/Secondary Education), Assistant/Deputy/Joint Director of Accounts (Education), Directorate of Pension, Provident Fund & Group Insurance, West Bengal and the Pension Disbursing Officers are tagged in the e-Pension portal.

The procedure of application, examination, scrutiny, processing and settlement of pension case and issue of Pension Payment Order under the West Bengal Recognised non-Government Educational Institution Employees (DCRB) Scheme, 1981 introduced vide G.O. No. 136-EDN(B) dated 15.05.1985 will stand modified to the extent as narrated in this order.

This is issued in cancellation of G.O. No. 88-SE(B), Dated, 26.05.1998 & in modification of all other relevant G.O.s running in this field to the extent as narrated in this order.

All the definitions used in G.O. No. 136-Edn(B), Dated, 15.05.1985 are used hereinafter with the same meaning.

**PARA - 1: e-Pension Portal:**

**1.1: e-Pension Portal / website** with URL "[wbepension.gov.in](http://wbepension.gov.in)" will be utilised by all the stakeholders to discharge the role assigned under these rules to each of them.

**PARA - 2: Generation of list of such employees as on 1<sup>st</sup> day of every month who will superannuate in the next 12th month:**

**2.1:** A list of employees to be superannuated in the next 12th month will be generated by the system on 1<sup>st</sup> day of every month and will be available in the login of the Head of Institution / Sub Inspector of Schools (PE). The system will also send user ID (Employee ID) and One Time Password (OTP) to the individual employee on his mobile number registered in Online Salary Management System (OSMS) Portal. In addition to the system based intimation through SMS/email, the Head of Institutions / Sub Inspector of Schools (PE) shall serve the system generated notice of superannuation to the retiring employees within one month from the date of generation of the list.

**2.2:** In case any employee has not entered/ provided mobile number in OSMS portal, he shall immediately get it updated through his school/Sub-Inspector of Schools (P.E.)/ District Inspector of Schools **within a date not later than twelve months before his/ her date of superannuation**. All sorts of communication to the stakeholders will be made through SMS and mail (if available) through system.

**PARA - 3: Process of application for pension by the employee:**

**3.1:** The employee shall login to the e-Pension Portal using the Login ID and One Time Password (OTP) sent to his mobile and will change the password immediately after 1<sup>st</sup> successful login to the Portal. In case, any employee has not received his User ID and Password 11 months prior to the date of retirement, he/she shall immediately contact his/her Head of Institutions (HOI) / Sub Inspector of School (P.E)/ District Inspector of Schools (SE/PE).

**3.2:** After fresh login, the employee shall fill up **Part-A** of the **Pension Application Form** online furnishing personal details and submit the same to the Head of Institutions (HOI) / Sub Inspector of Schools (P.E).

After the Part-A of the Pension Application has been submitted online he will take **printout** of the Part-A of the Pension Application in **triplicate** and sign the hard copies and submit two (2) copies of the Application along with **three (3) sets of joint/single photograph duly attested** and **three (3) sets of specimen signature** duly attested to the Head of Institutions (HOI) / Sub Inspector of School (P.E).

**3.3:** If the employee desires to **commute a portion of his / her pension**, the employee will **fill up Part-B** online and submit the same to the Head of Institutions (HOI) / Sub Inspector of Schools (P.E).

The employee will take **print out** in **triplicate** of the filled in **Part-B**, put signature at the specified space in the Application Form and submit two (2) copies along with the hard copy of Pension Application. He/ She will complete the submission of **Part-A** and **Part-B** (if applied) **in both online and hard copy mode within a date not later than ten months before his/her date of superannuation**.

**3.4:** The employee will ensure that **Nomination for DCRG and Nomination for LTA Pension** duly accepted by the Head of Institutions (HOI) / Sub Inspector of Schools (P.E)/ Appointing Authority/ Competent authority and self-attested **List of Family Members along with all other required documents as stated in Schedule I** are also enclosed to the hard copy of the Pension Application **without fail**.

**3.5:** In case the Applicant is Head of the Institution himself, pension application will be processed through appointing authority.

**PARA -4: Processing of application for pension submitted by the superannuating employee at the end of Head of the Institutions (HOI)/ Sub-Inspector of the Schools (SIS) (P.E.):**

**4.1:** The system based pension application will now be available in the login of the HOI (Head of Institution) in case employees of secondary schools/SIs (Sub-Inspector of schools) in case of employees of primary schools. **Once the hard copy of pension application** (Part - A and Part-B) along with other supporting papers as stated in Schedule I are submitted by the employee to the Head of Institutions (HOI) / Sub Inspector of School (SIS), he shall **acknowledge the receipt in the system** forthwith and **also hand over a system generated acknowledgement receipt to the employee.**

The Head of Institutions (HOI) / Sub Inspector of School (P.E) will now verify whether the Part - A is correct and complete in all respect and all required attachments have been submitted by the applicant with reference to Annexure-I (check list for HOI/SIs). If satisfied, the HOI/SIs will now proceed to fill-up the comprehensive form Part - C (Form for Sanction of Pension and Gratuity), Part - D (Pay Statement showing drawal of pay from the date of first appointment into service to date of superannuation/retirement/ death) and Part - E (Pay Certificate) of the applicant. HOI/SIs shall also verify the Part-B (Application for Commutation of Pension). Head of Institutions (HOI) / Sub Inspector of School (P.E) **now will arrange to complete the Service Book in all aspect.**

**4.2:** On completion of the process of filling up of Part - C, Pay Statement in Part - D and Pay Certificate in Part - E, the Head of Institutions (HOI) / Sub Inspector of School (P.E) will submit the same online using **Digital Signature Certificate (DSC)** to the Pension Sanctioning Authority. He/she will also ensure that the specimen signatures are duly attested by Group 'A' officer and the joint/single photographs are duly attested by the Headmaster/ Headmistress. He/She will then take **printout** of Part - C, Part - D, Part- E and Annexure-I in **duplicate, sign** the same and **attach a copy of the signed Part - C, Part-D, Part- E and Annexure-I with the documents submitted by the applicant. Duly completed Service Book and all required papers in support of entries made in the various parts of pension application in e-Pension Portal will be forwarded along with the print out of Forms and documents submitted by the applicant stated earlier to Pension Sanctioning Authority.**

**4.3:** In-case the pension application in Part - A, Part-B and/or documents furnished by the applicant are found **defective**, the Head of Institutions (HOI) / Sub Inspector of School (P.E) will **return the applications along with Annexure-I online using DSC to the applicant through system with comments** noted in the earmarked space of Annexure-I with request to the employee to re-submit the application within fifteen (15) days from the date of objection.

**4.4: After re-submission** by the applicant, Head of Institutions (HOI) / Sub Inspector of School (P.E) shall process the Pension Case as described in para 4.2.

**4.5:** The Head of the Institutions/ Sub-Inspector of the Schools (P.E.) shall complete the whole process of submission of soft copy as well as hard copy **not later than seven and half (7½) months before the date of superannuation** of the employee concerned.

**PARA – 5: Processing of pension case submitted by the Head of the Institutions / Sub-Inspector of the Schools (P.E.), at the end of the Pension Sanctioning Authority:**

**5.1:** The **system based pension papers** [Part – A, Part – B, Part – C, Part-D and Part-E] **will now be available in the login of the Pension Sanctioning Authority.** Once the hard copies of full set of pension papers containing all forms as stated above, the duly completed Service book, Nominations for DCRG/ LTA of Pension, List of family members/ legal heirs, duly attested joint/ single photograph and specimen signature and all other documents and certificates which are required for processing of pension cases are submitted, the **Pension Sanctioning Authority shall acknowledge the receipt in the system and hand over a system generated acknowledgement receipt to Head of Institutions (HOI) / Sub Inspector of School (P.E).** This date of receipt of the hard copies of pension papers will be treated as the date of receipt of the pension case in the office of the P.S.A. and also the date of receipt of the Part-B (Application for commutation of pension).

**5.2:** The **P.S.A. will allot** the system based pension papers along with submitted hard copies of pension papers to the A.I. of Schools (S.E./ P.E.) or any other employee, as the case may be, **for verification.** The office of the P.S.A. will verify the record with the reference to GO No. 64-SSE/17 dated 17/4/2017 issued in connection with procedure to be under taken by the office of the District Inspector of schools and Joint/Deputy/Assistant Director of Accounts (School Education) and other relevant G.Os. He will also arrange to **scan** the duly attested joint/ single photograph and duly attested specimen signature and store them at appropriate place for uploading. If the pension papers are in order, the assigned employee or AI of schools, as the case may be, will arrange to record certificates required to be furnished by P.S.A. in the specified place of both the online pension papers and the hard copies thereof and forward the same to the P.S.A.

**5.3:** The P.S.A. will now verify the case and observations made thereon by the assigned employee and/ or the A.I. of schools. **If satisfied,** he will then **Forward** the system based pension papers **online using DSC** and also the full set of hard copies of pension papers **to Assistant/Deputy/ Joint Director (A/Cs) for verification of the pay & services of the applicant.**

**5.4:** On the other hand, if on verification in the office of the P.S.A., the pension case is found to be **not in order,** the P.S.A. will **return the applications along with Annexure-II online using DSC to the** Head of Institutions (HOI) / Sub Inspector of School (P.E) **through system with comments** noted in the earmarked space of Annexure-II with request to **re-submit** the pension case and also in hard copy with his observations. After complying with the observations, the Head of Institutions (HOI) / Sub Inspector of School (P.E) schools will **re-submit** the case within fifteen (15) days from the date of objection. **The whole process including the processing of case after re-submission shall take not more than 45 days in the office of the P.S.A.**

**5.5:** In case of objection raised by Assistant/ Deputy/ Joint Director (A/Cs), PSA will comply with the observations. If there is any observation which requires compliance from the Head of the Institutions/ Sub-Inspector of the Schools (P.E.), PSA will return the case **online** to the Head of the Institutions/ Sub-Inspector of the Schools (P.E.) **using DSC** and also in hard copy with his observations. After complying with the observations, the Head of Institutions (HOI)/ Sub Inspector of Schools will **re-submit** the case within fifteen (15) days from the date of objection. **The whole process**

including the processing of case after re-submission shall take not more than 45 days in the office of the P.S.A.

5.6: Before initiating pension papers by the Head of Institutions (HOI) / Sub Inspector of School (P.E), as the case may be, due attention is to be paid to the paragraph 19(5) of the G.O. No. 136-Edn(B), Dated, 15.05.1985 so that the instruction contained in the said paragraph 19(5) is followed properly.

**PARA - 6: Processing of the pension case forwarded by the P.S.A., to Assistant / Deputy / Joint Director (A/Cs):**

6.1: Assistant/ Deputy/ Joint Director (A/Cs) shall act as Audit Officer of DPPG, West Bengal for the purpose of checking pension papers of the Non-Government Educational Institutions including the aided and sponsored primary schools (Excluding D.A. getting schools).

6.2: The system based pension papers will now be available in the login of the Assistant/ Deputy/ Joint Director (A/Cs). Once the hard copies of full set of pension papers are submitted, the Audit Officer shall acknowledge the **receipt** in the system forthwith and hand over a system-generated acknowledgement receipt. The Audit Officer will allot the system based pension papers along with submitted hard copies of pension papers to his/her assigned employee for verification. The assigned employee will verify the records with the reference to G.O. No. 64-SSE/17 dated 17/4/2017 issued in connection with procedure to be undertaken by the office of the District Inspector of schools and Audit Officer and other relevant G.Os and then forward the same with comments (if any) to the Audit Officer for his/her final verification and authentication.

6.3: Audit Officer shall exercise all necessary checks in regard to pay and service, leave availed of and other issues required as per existing Government orders and relevant papers submitted by the authority. The Audit Officer may call for any documents required for proper examination of pension papers and the same will be provided by the P.S.A. and/ or H.O.I. / S.I. of schools as the case may be.

6.4: In case the pension papers are found to be in order in all respect, the Audit Officer will authenticate the **online** 'Pay Statement' with a remark '**verified and found correct**'. The Audit Officer will also record the same certificate **in hard copy** and transmit the pension case online using DSC and also in hard copy to the P.S.A. within 60 days from the date of receipt of the hard copy.

6.5: In case the pension papers are found **defective**, the Assistant/ Deputy/ Joint Director (A/Cs) shall record his/her observations and return the **applications along with Annexure-III online using DSC to the P.S.A. through system with comments** noted in the earmarked space of Annexure-III and in hard copy with the request to comply with the observations and the later authority will resubmit the same within fifteen (15) days from the date of receipt after necessary compliance.

6.6: Once the pension case is **resubmitted**, it will be disposed by the Assistant/ Deputy/ Joint Director (A/Cs) in the same procedure stated above within fifteen (15) days from the date of resubmission by the P.S.A.

**PARA - 7: Processing of the pension case at the end of the P.S.A after verification by Assistant / Deputy / Joint Director (A/Cs):**

**7.1:** The system based pension papers duly authenticated by the Assistant/ Deputy/ Joint Director (A/Cs) will once again be **available** in the login of the P.S.A. On receiving back the duly certified hard copies of the pension papers from the Assistant/ Deputy/ Joint Director (A/Cs), the **P.S.A. will sanction the pension and other entitlements in Part-F online using DSC**. He will also sanction the pension and other entitlements in hard copy and put his signature in the hard copies of the pension papers.

**7.2:** At this stage the P.S.A. will ensure that the system based pension papers contain Part-A (Pension Application), Part-B (Application for Commutation of Pension), Part - C (Form for Sanction of Pension and Gratuity), Part - D (Pay Statement showing drawal of pay from the date of first appointment into service to date of superannuation/retirement/ death) and Part - E (Pay Certificate) and Part-F (Formal Sanction of Pension) and uploaded joint/ single photograph and specimen signature.

**7.3:** After being satisfied that system based pension papers are complete in all respect, he/she will **Forward** the case of the applicant **online using DSC** to the DPPG not later than three (3) months before the date of superannuation of the employee concerned.

**7.4: This physical pension file containing hard copies of all pension papers including Service Book shall be preserved in the office of the P.S.A. and he shall be responsible for its safe custody and providing it as and when required by the competent authorities.**

**PARA - 8: Processing of pension case at the end of the DPPG:**

**8.1:** The administrator in the office of DPPG Kolkata / Uttar Kanya, as the case may be, will arrange to create Audit Cell (s) headed by Assistant/ Deputy/ Joint Director(s) as Officer-in-Charge who will act as Approver. There will be two levels of auditors assisting the Approver, namely Verifier and Operator who will discharge the functions of audit.

**8.2:** The system based pension case received from the P.S.A. will be available in the login of administrator in the office of DPPG Kolkata / Uttar Kanya, as the case may be.

**8.3:** The DPPG will check that all the particulars of pension case are properly filled in, the pay and services are duly checked and verified by the **Audit Officer**.

The office of DPPG may examine the information given in the Pension Application Forms with reference to Recognition Master, Approval Master, Grant-in-aid Master of OSMS for verification in some selective cases to be decided by the DPPG. In case of doubt, the office of DPPG may call for physical copies of any records in respect of such selective cases.

**8.4:** If the pension case is found to be **in order**, Approver will approve the pension case using DSC.

**8.5:** If the pension case is **not in order**, the Officer-in-Charge/ Approver will return the case to the P.S.A. **online** using DSC with his observations noted at the specified space. The P.S.A. will comply with the observations so made and resubmit the pension case to the DPPG within fifteen (15) days after receipt of the objections.

**PARA - 9: Generation of PPO by DPPG:**

**9.1:** On final approval of the pension case by the Officer-in-Charge/ Approver, a draft 'e-PPO' will be generated through system and will be available for view in the login of concerned Officer-in-Charge/ Approver showing details of pension, retiring/ death gratuity and commuted value of pension etc. in a draft mode. The Officer-in-Charge/ Approver will verify the 'e-PPO' so generated. If the draft 'e-PPO' is found correct in all respect, he will approve the draft e-PPO using his DSC.

**9.2:** The digitally signed 'e-PPO' will now be generated with a **system generated unique PPO number**. Then the e-PPO will be transmitted with system generated Memo Number & Date to the **Pension Disbursement Officer/ Treasury Officer** through Integrated Financial Management System (IFMS) Portal and will be available in the login of Pension Disbursement Officer/ Treasury Officer for taking appropriate action as per WBTR, 2005 and as amended thereafter.

**9.3** The whole process in the office of the DPPG, WB including generation of e-PPO will be completed at least 15 days prior to the superannuation of the employee.

**PARA - 10: Issue of No-Liability Certificate :**

**10.1 :** After generation of e-PPO or the last date of service, whichever is later, the Head of the Institutions/ Sub-Inspector of the Schools (P.E.) shall transmit the '**No Liability/ Liability Certificate**' to the **Pension Sanctioning Authority online using DSC** after entering necessary data. The P.S.A. shall approve the same using DSC after entering necessary data at his end within 3 days from the date of receipt of it.

**PARA - 11: Payment of Pension etc. by the Pension Disbursement Officer/ Treasury Officer:**

**11.1:** The 'e-PPO' will now be available in the login of the **Pension Disbursement Officer/ Treasury Officer**. The Pension Disbursing Officer / Treasury Officer will schedule immediately (not later than 3 days) a date for **appearance of the pensioner which shall be within 10 (ten) days from the date of receipt of e-PPO**. The pensioner will be intimated through system generated SMS / e-mail about the date of his/ her appearance.

**11.2:** On appearance of the Pensioner, the **Pension Disbursement Officer/ Treasury Officer** will take a printout of e-PPO and handover pensioner's copy to the pensioner after due authentication with signature and stamp. The Pension Disbursing Authority will complete all procedures regarding identification of pensioners and arrange to disburse pensionary benefits directly to the bank account of the beneficiary.

**11.3:** When payment of first pension, Death-cum-Retiring gratuity and Commuted value of pension is made, a system generated intimation would be shared between IFMS Portal and e-Pension Portal.

**12.1:** In case of death of the employee while in service/ after superannuation, the Applicant (other than employee ), who is entitled for the benefits under the DCRB Scheme, 1981, will intimate the fact of death in OSMS through the HOI/SIs. The applicant will also furnish his contact number and email id to the HOI/SIs for entering the data in OSMS and subsequent generation of Notice for submission of pension papers through e-Pension portal. The P.S.A. shall verify the details and update the OSMS with due care. The applicant will get system generated SMS and mail from e-Pension portal for taking further necessary action as per procedure laid down in the above paragraphs.

12.2: If any event occurs before the date of superannuation but after initiation of the e-Pension file which will have an implication on any kind of pensionary benefit, the same should be brought to the notice of the P.S.A. by the HOI/SIs. The HOI/SI will inform the PSA with a request to return the file for accommodating the changes required as result of the event.

12.3: if an employee is declared permanently incapacitated in terms of Rule-8 (ii) of Chapter-IV of DCRB Scheme, 1981, he/she will intimate the fact of permanently incapacitation in OSMS through Head of Institutions (HOI) / Sub Inspector of School (P.E). He/she will also furnish his /her contact number and email id to the Head of Institutions (HOI) / Sub Inspector of School (P.E) for entering the data in OSMS and subsequent generation of notice for submission of pension papers through e-Pension portal. The P.S.A shall verify the details and update the OSMS in due care. He/ she will get system generated SMS and mail from e-Pension portal for taking further necessary action as per procedure laid down in the above paragraphs.

12.4: if an employee undergoes voluntary retirement and the Managing Committee of the Institution accepts the voluntary retirement in its resolution, then the employee concern, after availing the voluntary retirement, will intimate the fact of voluntary retirement in OSMS through the Head of Institutions (HOI) / Sub Inspector of School (P.E) within 10 days after the date of voluntary retirement. He/ she will also furnish his /her contact number and email id to the Head of Institutions (HOI) / Sub Inspector of School (P.E) for entering the data in OSMS and subsequent generation of Notice for submission of pension papers through e-Pension portal. The P.S.A shall verify the details and update the OSMS with due care. He/ she will get system generated SMS and mail from e-Pension portal for taking further necessary action as per procedure laid down in the above paragraphs.

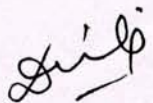
13: Failure to comply with the provisions as stated above by the concerned authorities shall be seriously viewed and may make such Authorities liable for disciplinary action.

In particular the Head of the Institution, S.Is, Pension Sanctioning Authority, Assistant / Deputy / Joint Director (A/Cs), the DPPG, WB and the PDO/ Treasury shall be held personally responsible for non-compliance with the procedure required to be followed by them for payment of pension. For any lapse on their part in this regard, the concerned authorities apart from being liable for disciplinary action, may also be required to pay to the Government such amount which Government may have to pay additionally by way of interest for delayed payment of retiring benefits to the employees.

14: The Order shall take immediate effect.

15: This Order issues with the concurrence of the Finance Department, vide U.O. No. Misc / 60/2017 of Group-H dated 17.04.2017.

Encl: ANNEXURES

  
Secretary  
School Education Department



Copy forwarded for information and necessary action to:

1. The Principal Accountant General (A&E), West Bengal, Treasury Buildings, Kolkata 700001
2. The Principal Secretary to the Government of West Bengal, Finance Department, Nabanna, Howrah 711102
3. The Director of Pension, Provident Fund and Group Insurance, West Bengal, Finance Department, Purta Bhavan, 2<sup>nd</sup> floor, Kolkata 700091
4. The Director of Treasuries and Accounts, Mitra Building, Lyons Range, Kolkata 700001
5. The Commissioner, School Education, West Bengal, Bikash Bhavan, 7<sup>th</sup> floor, Salt Lake, Kolkata 700091
6. The Director of Accounts, School Education Department, Bikash Bhavan, 2<sup>nd</sup> floor, Salt Lake, Kolkata 700091
7. District Inspector of Schools (Primary/Secondary),.....
- ✓ 8. Chairman, DPSC,.....
9. The Treasury Officer,.....
10. The Pay & Accounts Officer,.....



Secretary  
School Education Department