

**MEMORANDUM**

Subject: Procedure under e-Pension regarding checking of pension cases of employees of the Non-Government Aided and Recognised Educational Institutions at District level

In terms of G.O. no. 86-SE(B) dated 01.06.1995 the procedure of examination of pension papers of the Non Government Aided and Recognised Educational Institutions by the office of the District Inspector of Schools (SE/PE) the P.S.A. and verification of the same by the Assistant Director of Accounts and Finance officer of the District Primary School Council are laid down in detail.

Now the State Government has introduced a revised procedure for online disposal of the pension cases of the employees of Non Government Aided and Recognised Educational Institutions through e-Pension portal. In order to accommodate the requirements of the changed environment including introduction of a check list at the levels of Sub-Inspector of Schools(PE)/ Head of Institution, it is felt that the procedure laid down in G.O. no. quoted above requires modification.

The e-Pension file of the employees under the District Inspector of Schools (PE) will also be verified by the Assistant/ Deputy/ Joint Director of Accounts who has been declared an audit officer in respect of the primary pension also vide G.O. No. 63-SSE/17 dated 17/4/2017.

After careful consideration of the matter the Governor is pleased to prescribe a revised procedure for examination of pension papers by Sub-Inspector of Schools(PE)/ Head of Institution, District Inspector of Schools (SE/PE) and Assistant/ Deputy/ Joint Director of Accounts under e-Pension system with respect to the newly introduced annexures as detailed below-

**Role of the Sub-Inspector of Schools(PE)/ Head of Institution:**

On receipt of the e-Pension file along with hard copies including enclosures, the same will be available in the login of the Sub-Inspector of Schools(PE)/ Head of Institution, who may verify the case at his end or allot the same to the login of the operator to be created for the purpose. The operator will verify and forward the pension case with comments to login of the superior Authority with respect to the points of Annexure-I.

The Sub-Inspector of Schools(PE)/ Head of Institution will ensure that the e-Pension file along with hard copies of pension papers are thoroughly examined in the procedure laid down in Annexure-I and all the whole process of preparing a pension case has been completed. Then he will forward the case to the District Inspector of Schools (PE/SE).



**Role of the office of the District Inspector of Schools (SE/PE):**

On receipt of the e-Pension file along with hard copies including service book, the same will be available in the login of the District Inspector of Schools (SE/PE) who may verify the case at his end or allot he same to the login of the Assistant Inspector of Schools (SE/PE) who may in turn verify the case at his end or sub-allot the same to the operator to be created for the purpose. The operator and/or the Assistant Inspector of Schools (SE/PE) will verify and forward the pension case with comments to login of the superior Authority with respect to the points of Annexure-II.

The P.S.A. will ensure that the e-Pension file along with hard copies of pension papers including service book are thoroughly examined in the procedure laid down in Annexure-II and forward the same to the Assistant/ Deputy/ Joint Director of Accounts.

**Role of the office of the Joint/Deputy/Assistant Director of Accounts:**

On receipt of the e-Pension file along with hard copies including service book, the same will be available in the login of the Joint Director of Accounts who may verify the case at his end or allot he same to the login of the Assistant/ Deputy Director of Accounts who may in turn verify the case at his end or sub-allot the same to the operator to be created for the purpose. The operator will verify and forward the pension case with comments to login of the Assistant/ Deputy/ Joint Director of Accounts with respect to the points of Annexure-III:

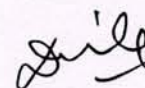
On being satisfied himself as to the correctness of the pay and services of the employee concerned, the Assistant/ Deputy/ Joint Director of Accounts will return the pension case along with hard copies including service book to the District Inspector of Schools (SE/PE) recording the prescribed certificates or noting his specific objections, if any.

The provisions of the G.O. No. 86-SE(B) dated 01.06.1995 stands modified to the extent prescribed in this order.

The Annexure-I, Annexure-II and Annexure-III as appended to this order have been introduced replacing the Annexure-I and Annexure-II prescribed under G.O. No. 86-SE(B) dated 01.06.1995.

The Order shall take effect from 17/4/2017. \*

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



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

Enclosure: Annexure-I, Annexure-II and Annexure-III.

### Annexure-I

(To be used by Sub-Inspector of Schools (P.E)/ Head of the Institution)

Pension papers of Sri/Smt/Late.....(Name of the employee) to be retired/retired/died on ..... of .....(Name of School) have been checked and verified. On verification, observations are noted below:-

1	Whether Comprehensive Form Part-A has been duly filled up and submitted	YES	NO	-
2	Whether Comprehensive Form Part-B has been duly filled up and submitted	YES	NO	N.A
3	Whether Nomination for DCRG (or List of family members certified by competent authority, if applicable) has been duly filled up and submitted	YES	NO	-
4	Whether Nomination for LTA Pension has been duly filled up and submitted	YES	NO	-
5	Whether three sets of specimen signature duly attested by Gr-A/ erstwhile Gazetted Officer have been submitted	YES	NO	-
6	Whether three copies Single/ Joint Photographs duly attested by Gr-A Officer/ Headmaster/ Headmistress of the Institution have been submitted	YES	NO	-
7	Whether any departmental proceeding/ court case is pending/ disposed off against the employee	YES	NO	N.A
8	Whether Invalidation Certificate from the competent authority/ Death certificate/ M.C Resolution in support of retiring pension/Govt. order relating to any special case like disappearance etc. has been furnished	YES	NO	N.A
9	Special Comments, if any	YES	NO	-

Submitted to the Sub-Inspector of Schools (PE) /Head of Institution for doing the needful.

Signature

\_\_\_\_\_ (Designation of the operator) . -

The case is forwarded herewith to the District Inspector of Schools(SE/PE), \_\_\_\_\_ (District)

Signature

Sub-Inspector of Schools (PE) /Head of Institution

\_\_\_\_\_ (Name of Circle/Institution)



**Annexure-II**

(To be used in the office of the District Inspector of Schools)

(PE/SE ..... District)

Pension papers of Sri/Smt/Late ..... (Name of the employee) to be retired/retired/died on ..... of ..... (Name of School) have been checked and verified. On verification, observations are noted below:-

Sl	Items	Yes	No	N.A.
1	Whether documentary evidence/ certificates in support of Recognition and Up-gradation of the Institution/approval of appointment/ educational and training qualification/ grants-in-aid/ extension of service beyond 60 years and Service Book have been furnished.	YES	NO	
2	Whether date of completion of examination/ publication of result of higher educational /training qualification have been verified w.r.t documentary evidence.	YES	NO	NA
3	Whether total period of service has been verified by the competent authority and recorded in Service Book and Part-B of the Pension Application.	YES	NO	
4	Whether Pay Certificate has been submitted showing details and liability/ No Liability Certificate has been recorded in Part-C.	YES	NO	
5	Whether details of refund of Employer's share of CPF including accrued interest have been recorded in Service Book and Part-B of the pension application.	YES	NO	NA
6	Whether Invalidation certificate in case of Invalid Pension, M.C Resolution accepting voluntary retirement or Death Certificate in death cases has been submitted.	YES	NO	NA
7	Whether Leave Account has been correctly maintained and Extra ordinary Leave showing details have been recorded in Service Book and Part-B.	YES	NO	
8	Whether Break in service, if any, has been condoned by competent authority.	YES	NO	NA
9	Whether Option to DCRB Rules 1981 and original Option & IPF Statement of various Pay revisions duly countersigned by competent authority have been furnished.	YES	NO	
10	Whether Date of Birth recorded in Service Book has been verified w.r.t documentary evidence.	YES	NO	
11	Whether any Provisional Pension/ Provisional Gratuity/ Ad-hoc Relief has been sanctioned, if yes, whether the same has been recorded in Service Book and Part-B.	YES	NO	
12	Whether Nomination for DCRG/LTA have been submitted and shown in the Part-B of the Pension Application. In absence of Nomination Whether Legal Heir Certificate with descriptive Roll has been submitted.	YES	NO	
13	Special Comments, if any	YES	NO	

Submitted to the Assistant Inspector of Schools (SE/PE) /District Inspector of Schools (SE/PE) for doing the needful.  
Signature \_\_\_\_\_

\_\_\_\_\_(Designation of the operator)

Submitted to the District Inspector of Schools (SE/PE) for doing the needful.  
Signature \_\_\_\_\_

Assistant Inspector of Schools (SE/PE) in-charge of pension

Memo No. \_\_\_\_\_

Date: \_\_\_\_\_

The case is forwarded herewith to the JD/DD/AD of Accounts ..... District with a request for his comments as to the admissibility of the same on scrutiny of records/papers enclosed.  
Signature \_\_\_\_\_

District Inspector of Schools (SE/PE) ..... District



**Annexure-III**

**(To be used in the Office of the Directorate of Accounts, School Education Department,  
District Offices)**

Pension papers of Sri/Smt./Late..... Received from D.I.S(S.E/P.E) vide his office Memo No..... Date ..... have been duly checked. Observations after audit are appended below-

Sl	Items	Yes	No	N.A.
1.	Original Option Form/ Forms in terms of Para-3 of G.O No. 136 Edn(B) dated 15.05.1985 as amended thereafter has been annexed to Pension Papers and found correct.	Yes	No	
2.	Original Options to various pay revisions & IPF Statements duly countersigned as applicable have been submitted and found correct after proper verification.	Yes	No	
3.	Improvement of qualification/ Change in the scale of pay have been verified w.r.t Order of the D.I.S/ or other superior authority read with relevant G.Os in respect of the employee concerned and found correct.	Yes	No	
4.	Qualifying Service as claimed has been checked and verified w.r.t Leave account, break-in-service and other documents and the same may be admitted towards pensionary benefits.	Yes	No	
5.	Date of Birth and Qualifications as recorded in Service Book & Pension Application have been verified and found correct.	Yes	No	
6.	Employer's share of C.P.F including interest thereon has been correctly calculated and refunded to Govt. accounts and challan refunding the same in appropriate Head of Account has been annexed to the Pension papers. Details of Employer's Share of C.P.F including Refund have been recorded in Service book.	Yes	No	N.A
7.	Service Verification Certificate has been recorded in Service Book and Part-C of the Pension application.	Yes	No	
8.	Last pay shown in Part - D (Pay certificate) tallies with the last pay recorded in the Part - E (Pay Statement).	Yes	No	
9.	A No Liability/ Liability Certificate has been issued by the appropriate authority.	Yes	No	
10.	Application for Commutation of Pension in Part-B has been verified and found correct, may be admitted.	Yes	No	N.A
11.	Provisional Pension, Gratuity has been sanctioned and supported by copy of Sanction Order. Appropriate Disbursement Certificate has been given in the Part-E.	Yes	No	N.A
12.	Invalidation Certificate from the competent authority/ Death certificate/ M.C Resolution in support of retiring pension/Govt. order relating to any special case like disappearance etc. has been furnished	Yes	No	N.A
13.	Entitlement of the claimant in death case/ LTA case has been verified w.r.t Nominations executed by the deceased employee and found correct	Yes	No	N.A
14.	Special Comments, if any			

Submitted to the Assistant/ Deputy/ Joint Director of Accounts for doing the needful.  
Signature \_\_\_\_\_

\_\_\_\_\_(Designation of the operator)



Memo No. \_\_\_\_\_

Date: \_\_\_\_\_

Certified that Pay and services of Sri/ Smt./ Late \_\_\_\_\_, (Designation), (Name of the Institution) have been verified and found correct and may be admitted towards pensionary benefits.

1. Period of Net Qualifying Service
2. Amount reckonable for pension
3. Amount reckonable for gratuity

Signature of Assistant/ Deputy/ Joint Director of Accounts

OR

Certified that Pay and services of Sri/ Smt./ Late \_\_\_\_\_, (Designation), (Name of the Institution) have been verified and found not in order as per return memo and returned to D.I.S(S.E/P.E) for rectification.

Signature of Assistant/ Deputy/ Joint Director of Accounts