



**Government of West Bengal**  
**Department of Panchayats & Rural Development**  
**Joint Administrative building (6<sup>th</sup> to 10<sup>th</sup> Floors)**  
**Block: HC, Plot No. 7, Salt Lake City, Sector-III, Kolkata-700106**

No. 3812/PN/O/I/2P-01/2017

Dated: 31/05/2019

**MEMORANDUM**

**Subject: Procedure for application, process and disposal of pension cases of the employees of three tier Panchayat Bodies through e-Pension Portal**

In view of the various e-Governance initiatives undertaken by the State Government to improve the quality of public services, it has been felt that benefit of such e-Governance initiatives may also be extended effectively for settlement of Pension and other retirement benefits of the employees under Panchayat Bodies.

The e-Pension ([wbepension.gov.in](http://wbepension.gov.in)) Portal of the Directorate of Pension, Provident Fund & Group Insurance, Finance Department is already in place and has been designed to minimize the physical movement of voluminous documents relating to pension cases and also to minimize time consumption in examination, audit and settlement of the pension cases under the existing scheme for payment of pension and gratuity on the date of superannuation of the employees of Panchayat Bodies. Every individual pensioner, Head of the Office and Pension Sanctioning Authority, Audit Officer i.e. Financial Controller & Chief Accounts Officer (FC&CAO), Zilla Parishad, Directorate of Pension, Provident Fund & Group Insurance (DPPG) and the Pension Disbursing Officer shall be on board in the e-Pension Portal so that the benefit of the retirement scheme may be extended to the beneficiary.

After careful consideration of the matter, the Governor is now pleased to lay down the following procedure to be followed by the various authorities for switching over to 'e-Pension' Portal and settlement of pensionary claims of the employees of the Panchayat Bodies.

The procedure of application, examination, scrutiny, processing and sanction of pension case and issue of Pension Payment Order under the Death-cum-Retirement Benefit Scheme, 1985 for the employees of Panchayat Bodies introduced vide G.O. No.30314/VIII/Panch/2P-4/85 dated 30.08.1985 will stand modified to the extent as narrated in this order.

**PARA – 1: e-Pension Portal:**

**1.1:** The e-Pension website/Portal with URL “[wbepension.gov.in](http://wbepension.gov.in)” will be utilized by all the stakeholders to discharge the role assigned under this order 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 12<sup>th</sup> month:**

**2.1:** A list of employees who will be superannuating in the 12<sup>th</sup> month will be generated by the e-Pension Portal having a backward integration with the Salary Management Application (i-OSMS) run by the P&RD Department on 1<sup>st</sup> of every month. The list containing the Name, Employee ID, Address, Date of Superannuation, Mobile Number and e-mail ID of the employee will be transmitted electronically to the respective Head of Office and Pension Sanctioning Authority. The system will also generate and send user ID (Employee ID) and OTP to the individual employee to his mobile number/ e-mail ID registered in Departmental portal. In addition to the system-based intimation through SMS/email, the Head of Office shall serve the duly signed system generated “Notice of Superannuation” within one month from the date of generation of the list.

**2.2:** In case any employee has not entered/ provided mobile number in Departmental portal, he shall immediately get it updated in the concerned Portal through his Head of Office and Pension Sanctioning Authority. All sorts of communication will be made through SMS and mail (if available) through e-Pension Portal.

**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 Password sent to his mobile and will change the password immediately after successful login to the Portal. In case, any employee has not received his User ID and Password 11 months prior to his date of retirement, he shall immediately contact his Head of Office and Pension Sanctioning Authority.

**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 Office.

After submission of Part-A of the Pension Application online, he will take printout of 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 named and attested and three (3) sets of specimen signature duly attested to the Head of Office.

**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 Office and Pension Sanctioning Authority. The employee will take print out of the filled in Part-B, put signature at the specified space in the Application Form and submit it 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 date of retirement.

**3.4:** The employee will ensure submission of "Nomination for DCRB" and "Nomination for LTA Pension" duly accepted by the Head of Office and self-attested "List of Family Members" and other required documents in hard copies along with the Pension Application without fail.

**PARA – 4: *Processing of application for pension submitted by the superannuating employee at the end of the Head of Office and Pension Sanctioning Authority:***

**4.1:** In case of the employees of Gram Panchayats, the system-based pension application will now be available electronically to the Block Development Officer being the Head of the Office. Once the hard copy of pension application [Part – A and Part-B (where applied for)] is submitted by the employee to the Head of the Office or his authorized Assistant (Operator), he shall acknowledge the receipt in the system and hand over the system generated Acknowledgement to the applicant.

The Block Development Officer will now verify whether 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 Head of the Office). If satisfied, the Block Development Officer will now proceed to fill-up the Comprehensive Forms Part – C (Form for Sanction of Pension and Gratuity), Part – D (Pay Statement showing drawal of pay from the date of first appointment into approved service to date of superannuation/retirement/ death) and Part – E (Pay Certificate) of the employee. He shall also verify and accept the Part-B (Application for Commutation of Pension). The Block Development Officer will now arrange to complete the Service Book in all aspects.

**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 Block Development Officer will submit the same online using Digital Signature Certificate to the FC&CAO, Zilla Parishad of the District for audit. He/she will also ensure that the specimen signature and the joint/single photographs are duly attested by a Group-A Officer. He/She will also scan the duly attested and named joint/ single photograph and duly attested specimen signature and upload them in the e-Pension Portal. He will then take printout of Part – C, Part – D and 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 the FC&CAO, Zilla Parishad of the District.



In case of the employees of Gram Panchayat, the date of receipt of the hard copies of pension papers and also the date of receipt of Part-B (Application for Commutation of Pension) will be treated as the date of the receipt of the pension case in the office of the Pension Sanctioning Authority.

**4.3:** The employees of Panchayat Samiti and Zilla Parishad will submit their online application to the Executive Officer of Panchayat Samiti and the Additional Executive Officer of the Zilla Parishad concerned respectively. The Head of the Office or his operator shall acknowledge the receipt in the system and hand over the system generated acknowledgement to the applicant. The Head of Office 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 Head of the Office). If satisfied, he will take steps as laid down in para 4.1.

**4.4:** The Executive Officer of the Panchayat Samiti in case of employees of Panchayat Samiti and the Additional Executive Officer, of the Zilla Parishad in case of employees of Zilla Parishad/ Mahakuma Parishad will then forward the case to the Sub-Divisional Officer in case of Panchayat Samiti and to the District Magistrate in case of Zilla Parishad/ Mahakuma Parishad being the Pension Sanctioning Authority in each of the tiers respectively by using Digital Signature Certificate. He / She will also scan the duly attested and named joint / single photograph and duly attested specimen signature and upload them in the e-Pension Portal. He will then take printout of Part – C, Part – D and 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 documents in support of entries made in the various parts of pension application in e-Pension Portal will be forwarded to the PSA along with the printout of forms and documents submitted by the applicant stated earlier.

**4.5.** On receipt of the e-Pension file along with hard copies including service book of the employee, the PSA will verify Part-A, B, C, D and E and accept the Part-B (Application for commutation of pension) with reference to Annexure-II (Check list for P.S.A.) and will submit the same online using Digital Signature Certificate to the FC&CAO of the District concerned and subsequently send the hard copies of the above documents to the FC&CAO for audit. 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).

**4.6.** In case the pension application in Part – A and / or documents furnished by the applicant are found defective, the Head of Office (the Block Development Officer/ Executive Officer of the Panchayat Samiti / Additional Executive Officer of the Zilla Parishad/ Mahakuma Parishad , as the case may be) will return the application along with Annexure-I online using DSC to the Applicant through system with comments to be noted in the earmarked space of Annexure-I with request to re-submit the application within fifteen (15) days from the date of objection.



- After re-submission by the applicant, the Head of the Office shall process the pension case as described in para 4.2 and 4.3.

**4.7:** In case of employees of Gram Panchayat, the Block Development Officer concerned shall complete the whole process of submission of pension case through e-Pension Portal as well as hard copies of the pension documents not later than eight months before the date of superannuation of the employee concerned to the Audit officer (FC&CAO of the District). In case of employees of Panchayat Samiti and Zilla Parishad / Mahakuma Parishad, the Executive Officer of the Panchayat Samiti and the Additional Executive Officer of the Zilla Parishad/ Mahakuma Parishad being the head of the office shall complete the process of submission of soft copy as well as hard copies of the pension documents to the Pension Sanctioning Authority not later than 8(eight) months before the date of superannuation of the employee concerned. The PSA shall complete the whole process of submission of soft copy as well as hard copy to the Audit Officer not later than eight months before the date of superannuation of the employee concerned.

**PARA – 5: *Processing of the pension case forwarded by the Head of Office and P.S.A., at the end of FC&CAO:***

**5.1:** FC&CAO shall act as representative of DPPG, West Bengal and function as Audit Officer for the purpose of checking pension papers of the Employees of the Panchayat Bodies.

**5.2:** The system based pension papers will now be available electronically to the FC&CAO. Once the hard copies of full set of pension papers are submitted, the Audit Officer or his authorized Assistant (operator) shall acknowledge the receipt in the system forthwith and hand over a system generated acknowledgement. The Audit Officer will allot the system-based pension application along with submitted hard copies of pension papers to his assigned employees for verification. The assigned employee shall verify the records with reference to the G.O.s in force in connection with the procedure to be undertaken by the Audit Officer and other relevant G.O.s and then forward the same with comments (if any) in the Audit Sheet to the Audit Officer for his/her final verification and authentication.

**5.3:** 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 with reference to the Audit Sheet (Check list for Audit Officer). 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. expeditiously.

**5.4:** 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 the hard copy to the P.S.A. within 60(sixty) days from the date of receipt of the hard copy.

**5.5:** In case the pension papers are found defective, the FC&CAO shall record his observations and return the applications along with Audit Sheet online using DSC to the P.S.A. through system with comments noted in the earmarked space of Audit Sheet and in hard copy with the request to comply with the observations and the later authority resubmit the same within 15 (fifteen) days from the date of receipt after necessary compliance.

**5.6:** Once the pension case is **re-submitted**, it will be disposed by the FC&CAO in the same procedure stated above within fifteen (15) days from the date of re-submission by the P.S.A.

**PARA – 6: *Processing of the pension case at the end of the P.S.A. after verification by the FC&CAO:***

**6.1:** The system-based pension papers duly authenticated by the FC&CAO will once again be available electronically to the P.S.A. The P.S.A. or his operator shall acknowledge the receipt in the system and hand over the system generated acknowledgement to the FC&CAO. On receiving back, the duly certified hard copies of the pension papers from the FC&CAO, 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.

**6.2:** 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 approved service to date of superannuation/retirement / death), Part – E (Pay Certificate) and Part-F (Formal Sanction of Pension), uploaded joint/ single photograph, specimen signature and Annexure-I, II and Audit Sheet.

**6.3:** 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 3(three) months before the date of superannuation of the employee concerned.

**6.4:** The 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/she shall be responsible for its safe custody and providing it as and when required by the competent authorities.

**PARA – 7: *Processing of pension case at the end of the DPPG and issuance of e-PPO:***

**7.1:** The system based pension case received from the P.S.A. will now be available electronically in the login of the DPPG, West Bengal.

**7.2:** The DPPG will examine the pension case with reference to the prescribed audit sheet. If the pension case is found to be in order, the authorized Officer of DPPG, West Bengal will



approve the pension case and generate e-PPO. He/ She shall then authenticate the e-PPO using DSC. Then the e-PPO will be transmitted with system generated Memo. No. and date to the Pension Disbursement Officer through IFMS Portal and will be available in the login of Pension Disbursement Officer for taking appropriate action as per the West Bengal Treasury Rules, 2005 as amended thereafter.

**7.3:** If the pension case is not in order, the authorized Officer will return the case to the P.S.A. online using DSC with his observations noted at the specified space within 30(thirty) days. The P.S.A. will comply with the observations so made and resubmit the pension case to the DPPG within fifteen (15) days.

**7.4:** In case of any doubt, the office of DPPG may call for physical copies of any records in respect of such selective cases.

**PARA 8: Issue of 'No Liability Certificate':**

**8.1:** In normal case i.e. in absence of any specific event which has a bearing on the sanction/ release of amount of pensionary benefit of the concerned employee, "Liability/No Liability Certificate" will be available electronically to the Head of the Office on the date of issuance of e-PPO by DPPG, WB or on the date of superannuation of the employee, whichever is later, for further processing. In case of Gram Panchayat Employees, the Block Development Officer being the PSA will transmit electronically the 'Liability/ No Liability Certificate' online using DSC after entering necessary data to the Pension Disbursing Authority within 3(three) days. In case of employees of Panchayat Samiti and Zilla Parishad /Mahakuma Parishad, Head of the office will transmit electronically the 'Liability/ No Liability Certificate' online using DSC after entering necessary data to the P.S.A. within 7(seven) days. P.S.A will further transmit it electronically to the Pension Disbursing Authority online using DSC within 7(seven) days. .

**PARA-9: Payment of Pension etc. by the Pension Disbursement Officer/ Treasury Officer:**

**9.1:** The e-PPO generated from e-Pension Portal, will now be available electronically to the Pension Disbursement Officer/ Treasury Officer through a backward integration with IFMS Portal of the Finance Department. The Pension Disbursement Officer/ Treasury Officer will schedule immediately [not later than 3(three) 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 through IFMS Portal about the date of his/ her appearance.

**9.2:** On appearance of the Pensioner, the Pension Disbursement Officer/ Treasury Officer will take 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.

**9.3:** A system generated intimation would be shared between IFMS portal and e-Pension Portal after payment of first Pension, Death-cum-Retiring gratuity and Commuted value of pension,

#### **PARA 10: Special Cases**

**10.1:** 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 1985, will intimate the fact of death in Departmental portal through Head of Office. The applicant will also furnish his/her contact number and email ID to the Head of Office for entering the data in Departmental portal and subsequent generation of Notice for submission of pension papers through e-Pension portal. The Head of Office shall verify the details and upgrade the Departmental portal 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.

**10.2:** If any event occurs before the date of superannuation but after initiation of the e-Pension file that will have an implication on any kind of pensionary benefit, the same should be brought to the notice of the P.S.A. who will inform all concerned and accommodate the changes required as result of the event.

**10.3:** If an employee is declared permanently incapacitated in terms of DCRB Scheme, 1985, he/she will intimate the fact of his /her state of permanent incapacitation to the Head of the Office. He/she will also furnish his /her contact number and email ID to the Head of the Office for entering the data in Departmental Portal and subsequent generation of notice for submission of pension papers through e-Pension portal. The Head of the Office shall verify the details and update the Departmental Portal with due care. He / She will get system generated SMS and e-mail from e-Pension portal for taking further necessary action as per procedure laid down in the above paragraphs.

**10.4:** If an employee undergoes voluntary retirement and the Appointing Authority accepts the voluntary retirement, then, the employee concerned, after availing the voluntary retirement, will intimate the fact of voluntary retirement in Departmental Portal through the Head of the Office 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 the Office for entering the data in Departmental Portal 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 Departmental Portal 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 foregoing paragraphs.



11: All the stakeholders shall discharge their assigned duties within the timeframe fixed in this Order to ensure timely payment of retiral benefits to the employees of three tier Panchayat Bodies.

12: The Order shall take effect immediately.

13: This Order issues with the concurrence of the Finance Department, Group P2 vide UO No. Group-P2/2019-2020/0038 dated 10/05/2019.

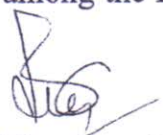
  
Additional Chief Secretary to the  
Government of West Bengal

**Memo. No.3812/1(160)/PN/O/I/2P-01/2017**

**Dated: 31/05/2019**

Copy forwarded for information and necessary action to:

- 1) The Principal Accountant General(A&E), West Bengal, Treasury Building, Kolkata-700001
- 2) The Principal Accountant General(G&SSA), West Bengal, Treasury Building, Kolkata-700001
- 3) The Principal Accountant General(E&RSA), West Bengal, CGO Complex, MSO Building DF Block, Sector-I, Salt Lake, Kolkata-700064
- 4) The Director of Treasuries & Accounts, West Bengal, 4 Lyons Range, 2<sup>nd</sup> and 3<sup>rd</sup> floor, Kolkata-700001
- 5) The Commissioner, Panchayats & Rural Development, West Bengal
- 6) The Director of Pension, Provident Fund & Group Insurance, West Bengal, Purta Bhavan, Bidhan Nagar, Kolkata-700009
- 7) The District Magistrate, \_\_\_\_\_...(All)
- 8) The Additional Executive Officer \_\_\_\_\_, Zilla Parishad...(All)
- 9) The Director, BRAIPARD, Kalyani
- 10) The Sub-Divisional Officer, \_\_\_\_\_ Sub-Division...(All)
- 11) The Financial Controller & Chief Accounts Officer, \_\_\_\_\_ Zilla Parishad...(All)
- 12) The District Panchayats & Rural Development Officer \_\_\_\_\_(All). He is also requested to circulate the copies of this Memorandum among the Block Development Officers in the district.

  
Special Secretary to the  
Government of West Bengal