

No. EDP/58/CPP/2022
O/o The PCDA (P)
Prayagraj
Dated: 22/06/2022

To

All HOOs/ROs/OROs/PAOs

Subject: **PFMS Validation procedure in SPARSH regarding**

Considering the issues faced by different Record Offices during PFMS Validation, the validation procedure has been changed. Now the Service Initiator will be able to Upload Cancelled Cheque in those cases where PFMS validation is pending for more than 24 hrs. and can forward the file to respective approver for approval. In this regard it is also intimated that **validation with respect to upload of Cancellation Cheque has been reduced to 24 Hrs from 72 Hrs . PFMS User Guide** is enclosed herewith as Annexure "A" for further reference.

This has been issued with the approval of CDA (P).

-----sd-----
(R.K.GUPTA)
ACDA

Copy to:
The O'I/c
IT&S Wing (Local)

for uploading the same on official website of PCDA (P)



Sr. Accounts Officer
(SPARSH)

ANNEXURE - A

PFMS USER GUIDE

STEP 1 : Fill Claim form data & Forward to verifier.

204407/RO_AMC_ORDER_1/RO AMC LUCKNOW (ORDER)2022.Claim Initiation for 11888811A

Save Forward Return Close

File Details

Basic Info

CLAIM FORM

File No.	Subject	Recipient
204407/RO_AMC_ORDER_1/RO AMC LUCKNOW (ORDER)2022	Claim Form	MAYUR GUPTA(RO_AMC_ORDER_2)

Send Close

All fields marked with * are mandatory.

Employment/ Re-Employment Consent *

I declare that I have not got employment after discharge from my present engagement in Army Service in any capacity either in a Govt. Department/Office, Company, Corporation, Autonomous body or Society of Central or State Govt. or Union Territory or a Local Body. In case I get re-employment, I shall report the fact to the disbursement agency.

Declaration for FMA *

I JAY S, a retired ex-Serviceman declare that I am residing at Aurangabad, and declare that

I will be residing in a district with no ECHS facility but would be availing ECHS facility for In-patient Department (IPD) and Out-patient Department (OPD) treatment. I will not be eligible for Fixed Medical Allowance (FMA).

Undertaking for Refund of Excess Payment *

I, the undersigned, agree and undertake to refund or make good any amount to which I am not entitled or any amount which may be credited to my account in excess of the amount to which I am or would be entitled. I further hereby undertake and agree to bind myself and my heirs, successors, executors and administrators to indemnify the

STEP 2 : PFMS gets validated by third party.

204407/RO_AMC_ORDER_1/RO AMC LUCKNOW (ORDER)2022.Claim Initiation for 11888811A

Save Forward Return Close

File Details

Basic Info Summary

CLAIM FORM

Personal Details Service Details Spouse Details Family Details Bank Details Nominee Details Other Pension Details Pensioner Declarations

All fields marked with * are mandatory.

Account Number * 3456789098765 IFSC Code * HDFC0000123 Bank HDFC BANK

Validation in-progress

Branch MADURAI - TAMIL NADU

Retrigger

Previous Next

Case 1: PFMS gets validated successfully.

204407/RO_AMC_ORDER_1/RO AMC LUCKNOW (ORDER)2022:Claim Initiation for 11888811A

Save Forward Return Close

File Details

Basic Info Summary

CLAIM FORM

Personal Details Service Details Spouse Details Family Details **Bank Details** Nominee Details Other Pension Details Pensioner Declarations

All fields marked with * are mandatory.

Account Number * 3456789098765 **IFSC Code *** HDFC0000123 **Bank** HDFC BANK

Validation Successful : null

Branch MADURAI - TAMIL NADU

Previous Next

Case 2 : PFMS Validation pending for 24 hrs: Option will be enabled to service initiator for upload cancel cheque and can forward the file to approver for approval. Status will change to – Manual verification by Service user

204413/RO_AMC_ORDER_1/RO AMC LUCKNOW (ORDER)2022:Claim Initiation for 11555511A

CLAIM FORM

Personal Details Service Details Spouse Details Family Details **Bank Details** Nominee Details Other Pension Details Pensioner Declarations

All fields marked with * are mandatory.

Account Number * 123456787654 **IFSC Code *** HDFC0000123 **Bank** HDFC BANK

Validation in-progress

Branch MADURAI - TAMIL NADU

Upload Cancelled Cheque *

Attach File(s) [(Max: 1 Attachment of 50 MB)]

[Allowed Types: PNG, JPEG, JPG, PDF]

[Pension Payment Order \(8\).pdf](#) ✕

Retigger

Previous Next

Case 3: PFMS Validation Failed: (Inactive, Dormant, Closed or Name match less than 30 %):

204419/RO_AMC_ORDER_1/RO AMC LUCKNOW (ORDER)/2022:Claim Initiation for 11222211A

Save Forward Return Close

File Details

Basic Info Summary

CLAIM FORM

Personal Details Service Details Spouse Details Family Details **Bank Details** Nominee Details Other Pension Details Pensioner Declarations

All fields marked with * are mandatory.

Account Number * 345678987654 **IFSC Code *** HDFC0000123 **Bank** HDFC BANK

Bank details not valid as per PFMS :

Branch MADURAI - TAMIL NADU

Upload Cancelled Cheque *

Attach File(s) [Max: 1 Attachment of 50 MB]

[Allowed Types: PNG, JPEG, JPG, PDF]

Retrigger

- Action by Service initiator user
 - o Can change bank details – PFMS validation will re-trigger

204419/RO_AMC_ORDER_1/RO AMC LUCKNOW (ORDER)/2022:Claim Initiation for 11222211A

Save Forward Return Close

File Details

Basic Info Summary

CLAIM FORM

Personal Details Service Details Spouse Details Family Details **Bank Details** Nominee Details Other Pension Details Pensioner Declarations

All fields marked with * are mandatory.

Account Number * 345677878788 **IFSC Code *** HDFC0000123 **Bank** HDFC BANK

Validation in-progress

Branch MADURAI - TAMIL NADU

Retrigger

Previous Next

o Left blank and forward claims for approval – File can move forward as present -Applicable only for Death cases as Bank details are mandatory for retirement cases.

o Can continue with same bank account with upload of cancel cheque and forward the file to approver for approval. Status will change to – Manual verification by Service user

204407/RO_AMC_ORDER_1/RO AMC LUCKNOW (ORDER)/2022:Claim Initiation for 11888811A

Save Forward Return Close

File Details

Basic Info Summary

CLAIM FORM

Personal Details Service Details Spouse Details Family Details **Bank Details** Nominee Details Other Pension Details Pensioner Declarations

All fields marked with * are mandatory.

Account Number * 3456789098765 **IFSC Code *** HDFC0000123 **Bank** HDFC BANK

Validation failed : null

Branch MADURAI - TAMIL NADU

Upload Cancelled Cheque *

Attach File(s) [Max: 1 Attachment of 50 MB]

[Allowed Types: PNG, JPEG, JPG, PDF]

Retrigger

204419/RO_AMC_ORDER_1/RO AMC LUCKNOW (ORDER)/2022:Claim Initiation for 11222211A

Save Forward Return Close

File Details

Basic Info Summary

CLAIM FORM

Personal Details Service Details Spouse Details Family Details Bank Details Nominee Details Other Pension Details Pensioner Declarations

All fields marked with * are mandatory.

Account Number * 345678987654 **IFSC Code *** HDFC0000123 **Bank** HDFC BANK

Validation failed : null

Branch MADURAI - TAMIL NADU

Upload Cancelled Cheque *

Attach File(s) [Max: 1 Attachment of 50 MB]

[Allowed Types: PNG, JPEG, JPG, PDF]

Identification_certificate16552919190005573.pdf

Forward To

File No.	Subject	Recipient
204419/RO_AMC_ORDER_1/RO AMC LUCKNOW (ORDER)/2022	Claim Form	<input checked="" type="radio"/> MAYUR GUPTA(RO_AMC_ORDER_2)

Send Close

Case 4: Cases with PFMS status as success and name matching pending with Service verifier.

File will be available to Service initiator users and not to PCDA(P) user and he will approve or reject the case. If he approves, option will be enabled to service initiator for upload cancel cheque and he can forward the file to approver for approval. Status will change to – Manual verification by Service user. In case of rejection, fresh or blank details could be processed as present.

Along with this, user has to manually approve name matching in the respective node under MIS

File Present in Service Initiator-

204419/RO_AMC_ORDER_1/RO AMC LUCKNOW (ORDER)/2022.Claim Initiation for 11222211A

Save Forward Return Close

File Details

Basic Info Summary

CLAIM FORM

Personal Details Service Details Spouse Details Family Details **Bank Details** Nominee Details Other Pension Details Pensioner Declarations

All fields marked with * are mandatory.

Account Number * **IFSC Code *** **Bank**

Pending for Approval with Service Verifier

Branch

Previous Next

To Approve file:

Path- login to Service Verifier → Task → Name Matching failed Cases

Search record in grid and Approve record.

Worklist Dashboard Management Info. System Tasks

Name Matching Failed Cases

All fields marked with * are mandatory.

External Integration * Bank Year of Retirement * 2022 Month of Retirement May

Service No. 11222211A

Search Reset

Sr. No	Service No.	Retirement Date	SPARSH Name	External Source Name	Coefficient Value	Action
1	11222211A	31-May-22	RAJ S	-	45.0	Approve Reject

Worklist Dashboard Management Info. System Tasks

Name Matching Failed Cases

All fields marked with * are mandatory.

External Integration * Bank Year of Retirement * 2022 Month of Retirement -Select-

Service No. 15233251A

Search Reset

Are you sure want to Approve ? Yes No

Sr. No	Service No.	Retirement Date	SPARSH Name	External Source Name	Coefficient Value	Action
1	15233251A	30-Apr-22	JAYA	-	52.0	Approve Reject

4. User need to upload cancel cheque in file present in Worklist and Forward it.

Save Forward Return Close

File Details

Basic Info Summary

CLAIM FORM

Personal Details Service Details Spouse Details Family Details **Bank Details** Nominee Details Other Pension Details Pensioner Declarations

All fields marked with * are mandatory.

Account Number * 34567890987654 IFSC Code * HDFC0000123 Bank HDFC BANK

Validation Successful : null

Branch MADURAI - TAMIL NADU

Upload Cancelled Cheque *

Attach File(s) [Max: 1 Attachment of 50 MB]

[Allowed Types: PNG, JPEG, JPG, PDF]

[226201800721_DEC_2021.pdf](#) ✕

To Reject Name matching:

Path- login to Service Verifier → Task → Name Matching failed Cases

-Search record in grid and Reject record.

Click on Reject option under Action.

Principal Controller of Defence Accounts (Pension) RO AMC LOCKNOW (DR...

Tasks > Name Matching Failed Cases

Worklist Dashboard Management Info. System Tasks

Name Matching Failed Cases

All fields marked with * are mandatory.

External Integration * Bank Year of Retirement * 2022 Month of Retirement May

Service No. 11222211A

Search Reset

Sr. No	Service No.	Retirement Date	SPARSH Name	External Source Name	Coefficient Value	Action
1	11222211A	31-May-22	RAJ S	-	45.0	Approve Reject

रक्षा लेखा प्रधान नियंत्रक (पेंशन)
Principal Controller of Defence Accounts (Pension)

MAYUR GUPTA
RO AMC LUCKNOW (OR...)

Tasks > Name Matching Failed Cases

Worklist Dashboard Management Info System Tasks

Name Matching Failed Cases

All fields marked with * are mandatory.

External Integration * Bank Year of Retirement 2022 Month of Retirement -Select-

Service No.

Search Reset

Are you sure want to Reject ?

Yes No

Sr. No	Service No.	Retirement Date	SPARSH Name	External Source Name	Coefficient Value	Action
1	37899873A	31-Mar-22	TEJA	-	52.0	Approve Reject
2	15233251A	30-Apr-22	JAYA	-	52.0	Approve Reject

Save Forward Return Approve Close

File Details

Basic Info Summary

Noting 1: RITESH PANDYA (SEPOY, RO AMC LUCKNOW),

Noting 2: MAYUR GUPTA (HAVILDAR, RO AMC LUCKNOW),

Noting 3: RITESH PANDYA (SEPOY, RO AMC LUCKNOW),

CLAIM FORM

Personal Details Service Details Family Details Bank Details Nominee Details Other Pension Details Pensioner Declarations

All fields marked with * are mandatory.

Account Number * 576527351358 IFSC Code * SBIN0004555 Bank STATE BANK OF INDIA

Rejected : null

Branch GHOSIA

Retrigger

Previous Next