



HRMS User Manual

Pensioner | Manual

Revision History

Version	Effective Date (DD/MM/YYYY)	Change Description	Reviewed / Approved by
V1	10/11/2023	Aatish Vartak	Malay Dey

Contents

1. Introduction	4
1.1. Overview	4
1.2. Scope of the Manual	4
2. Functionality and Process Flow	4
2.1 Dashboard	4
2.2 My Details.....	5
2.3 SBI Cares	7
2.4 Organ Donation.....	9
2.5 Life Certificate	10
2.6 Online Booking for Air Travel.....	13

1. Introduction

1.1. Overview

The Pensioner Module is your one-stop destination for seamless access to vital information and services. The user-friendly dashboard provides a quick glance at your pension details, ensuring a hassle-free experience. "My Details" offers a comprehensive view of your personal information, while "SBI Care" keeps you connected to support services. Stay informed and contribute to a noble cause with the "Organ Donation" feature. Plus, simplify the certification process with the convenient "Life Certificate" option. Effortlessly manage your pension journey with this intuitive module, designed to enhance your peace of mind and streamline essential tasks.

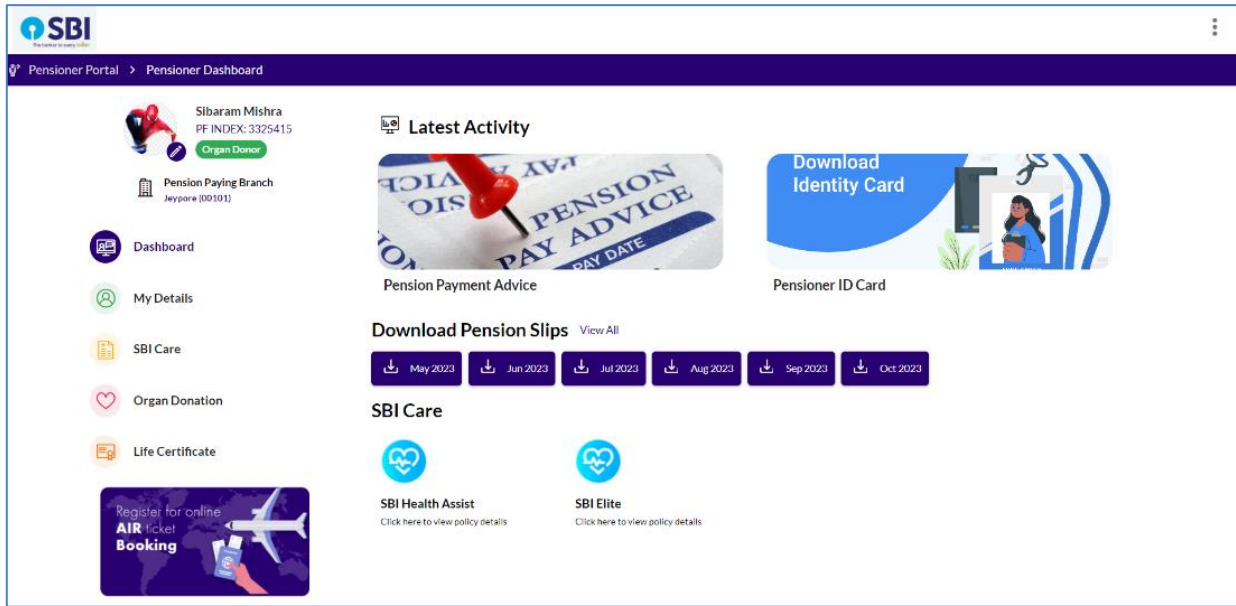
1.2. Scope of the Manual

The Pensioner Module user manual provides a comprehensive guide to navigating the system efficiently. This manual aims to empower pensioners with easy-to-follow instructions for a user-friendly and effective interaction with the system.

2. Functionality and Process Flow

2.1 Dashboard

Access a centralized hub for quick overviews of pension-related information, including Latest Activity, Download Pension Slips, and other options.



2.2 My Details

Update and manage personal information, pension account details, and beneficiary information easily. Ensure accuracy for seamless pension processing.



2.2.1 Personal Details

View personal information for accurate pension processing.

Personal Details		
Retired As Deputy Manager	Date of Joining 02-Sep-2013	Date of Retirement 31-Dec-2018
Retired from Branch Hazra Road (Calcutta)	Account Number 432829435	Date of Birth 01-Sep-1990

2.2.2 Contact Details


Ensure up-to-date contact information for effective communication.

 Contact Details
 Edit

<small>Mobile Number</small> 7842417582	<small>Alternate Mobile Number</small> 9856665589	<small>Personal E-mail Id</small> aswin.dev@secureeyes.net
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2.2.3 Address

Manage and update your current and permanent address for correspondence.


Addresses

Permanent Contact

Residential Telephone No.
9812324607

Full Address
 Rehan baugh room no 1 501 E Wingumbra,
 Sector 19, State : Manipur, India - 201310


Present Contact

Residential Telephone No.
9876543210

Full Address
 Rehan baugh room no 1 501 E Wingumbra,
 Sector 19, State : Andhra Pradesh, India -
 333333

2.2.4 Identity


Verify and update identity-related information for authentication purposes.


Identity

Type	Number
PAN Card	PQRSV4321J
Aadhaar Card	985673245654

2.2.5 Dependent Details

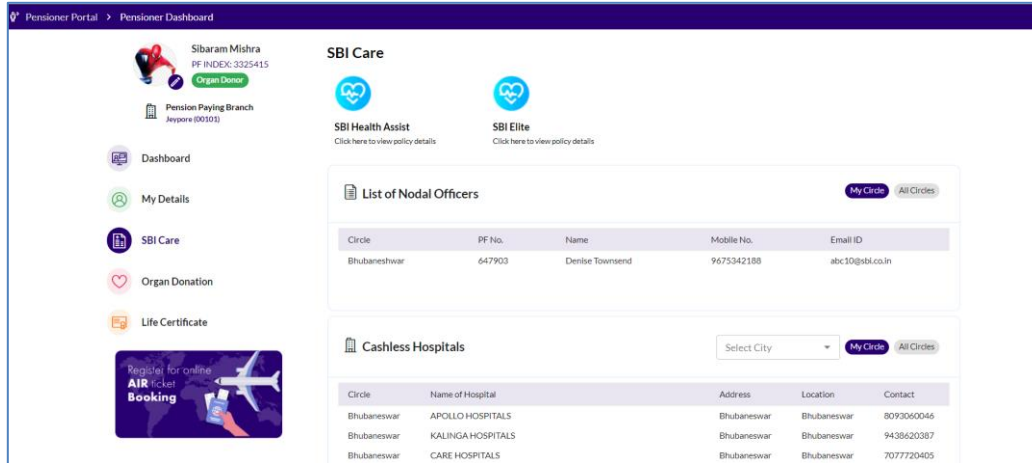
Manage information about dependents for beneficiary-related processes.


Dependent Details

Name	Relationship	Contact
Supriya Panigrahi	Wife	9437720791

2.3 SBI Cares

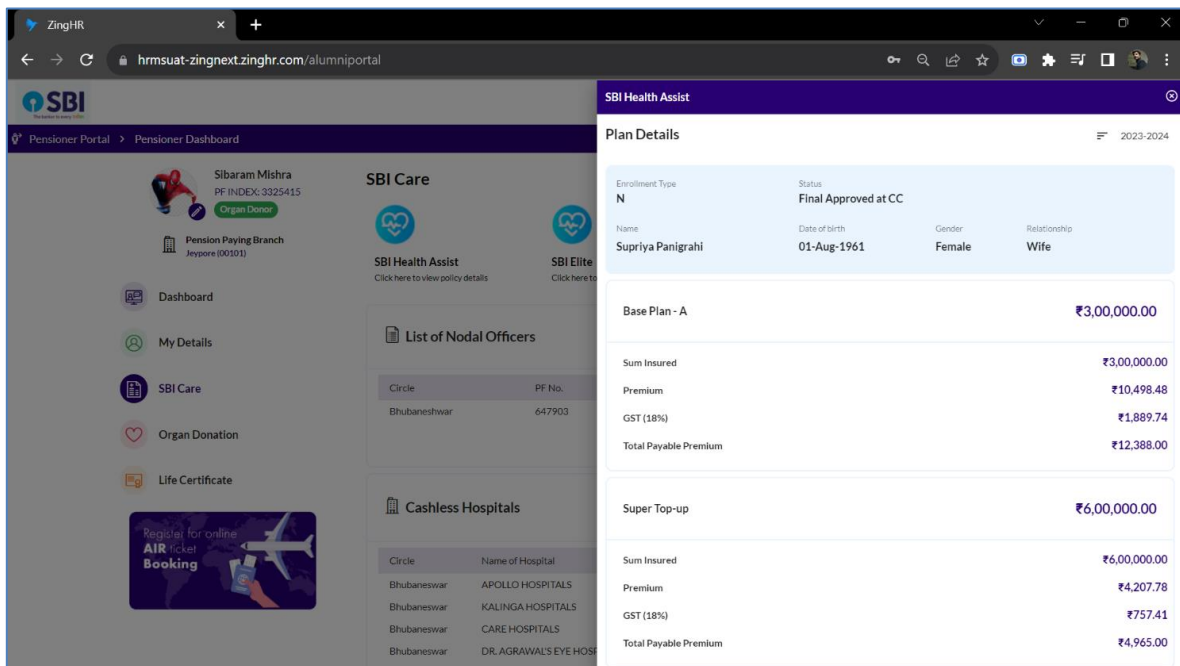
Explore SBI's support services and contact options for immediate assistance and guidance.



Functionality and Process Flow for SBI Care:

2.3.1 SBI Health Assist:

Access SBI's health assistance services, including health insurance information, claims assistance, and medical support.



Life Certificate Updation ✕

Pensioner PF INDEX

Shri. Ganesh V Hegde
PF INDEX: 6119549

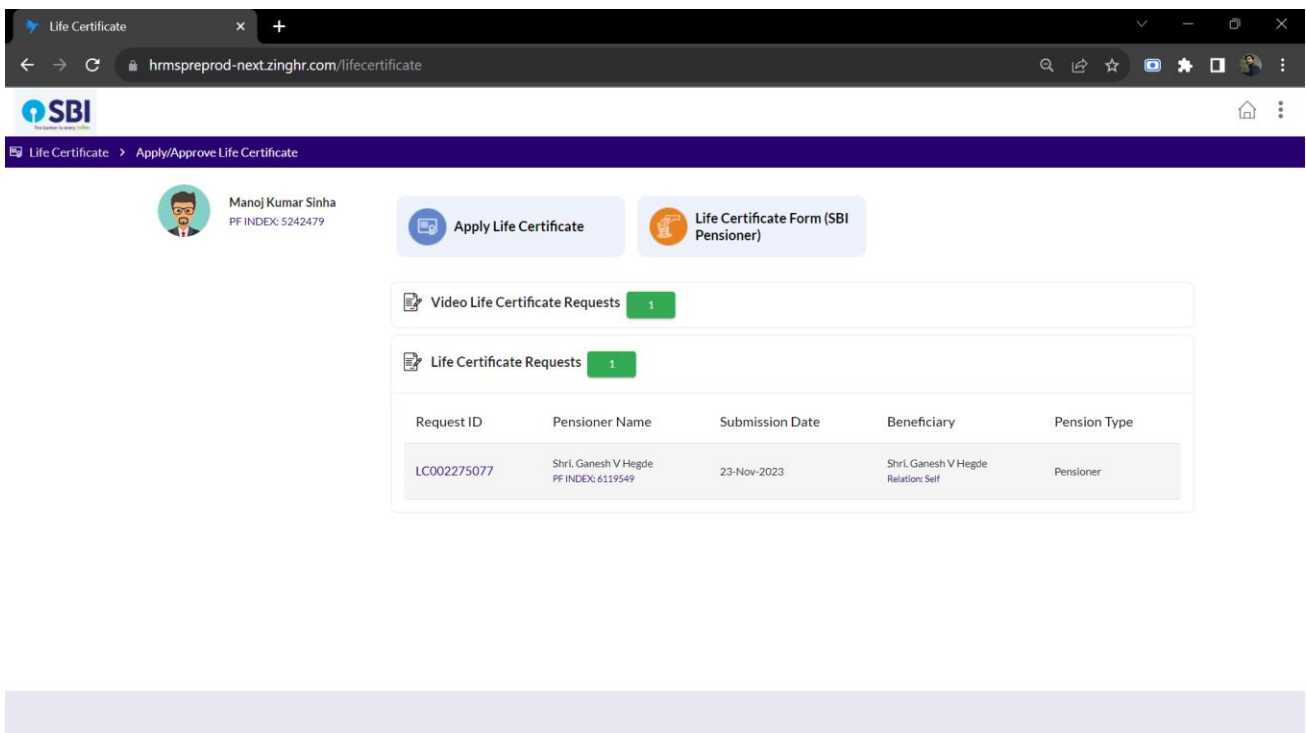
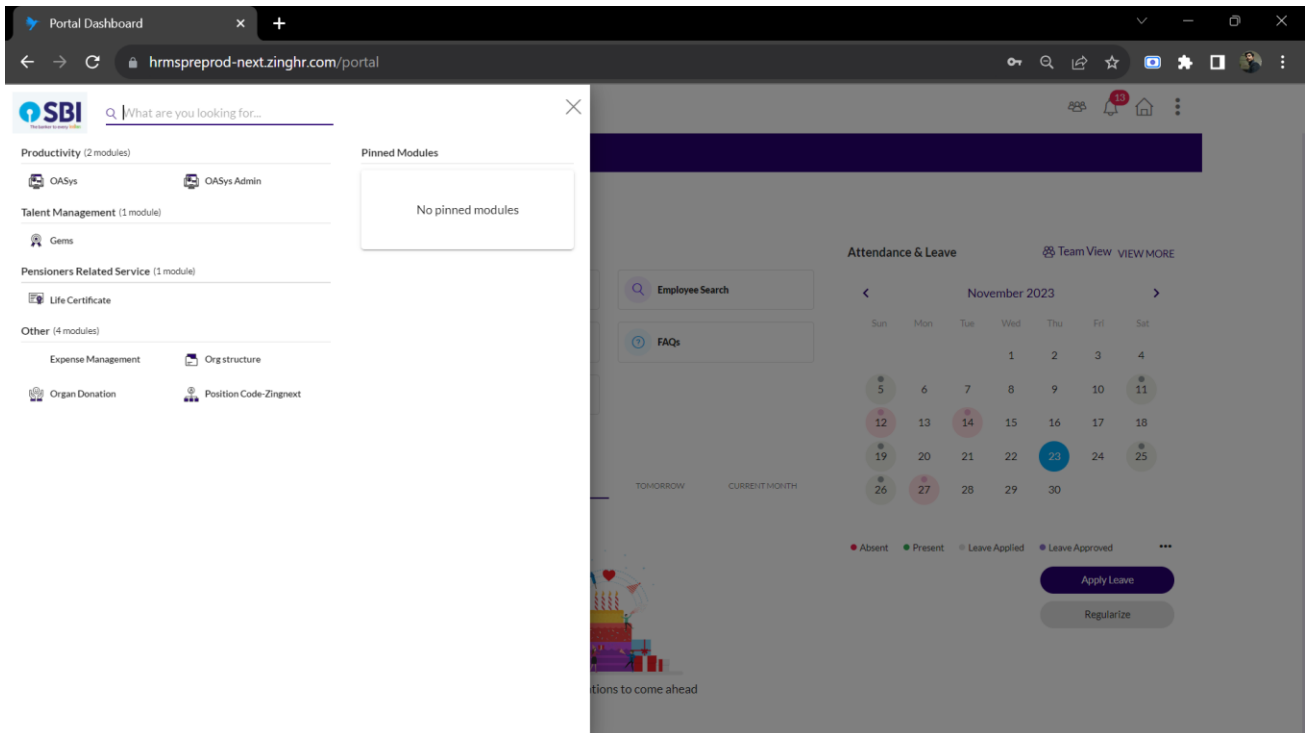
Mobile Number: 1131611118
Personal Email: GANESHVHEGDE2009@testemail.co.in
Pension Paying Branch: NCC,BASAVANGUDI (40014)
Pensioner Type: Ass. Bank Pensioner

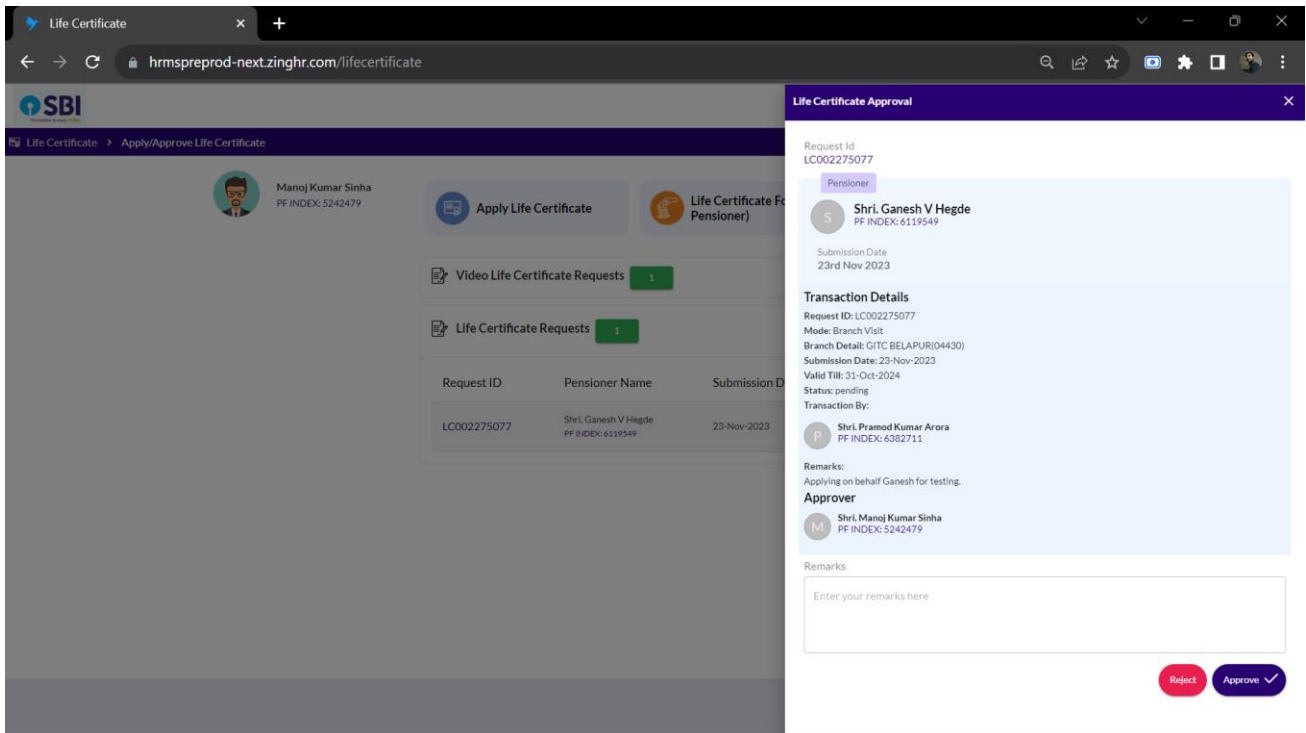
Approver
Shri. Manoj Kumar Sinha
PF INDEX: 5242479

Remarks

Applying on behalf Ganesh for testing.

✔ Life certificate registration done successfully, and awaiting for approval! ✕

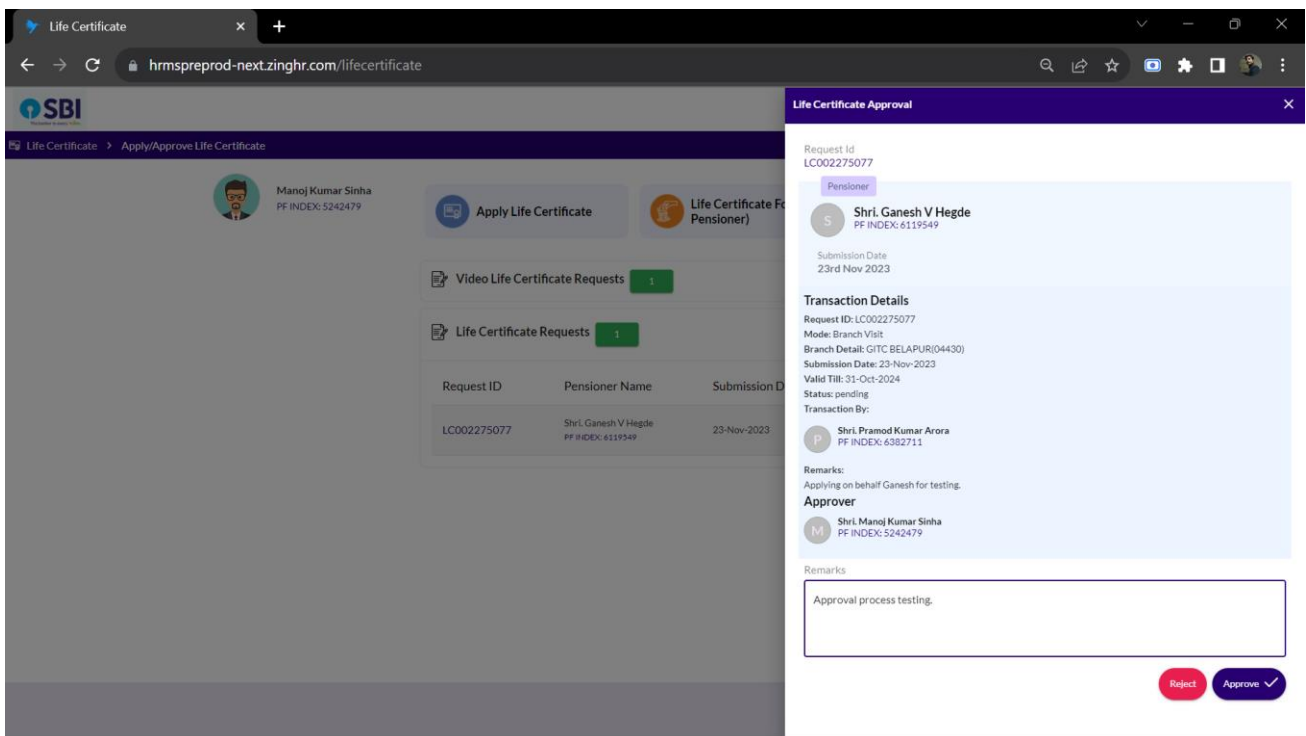




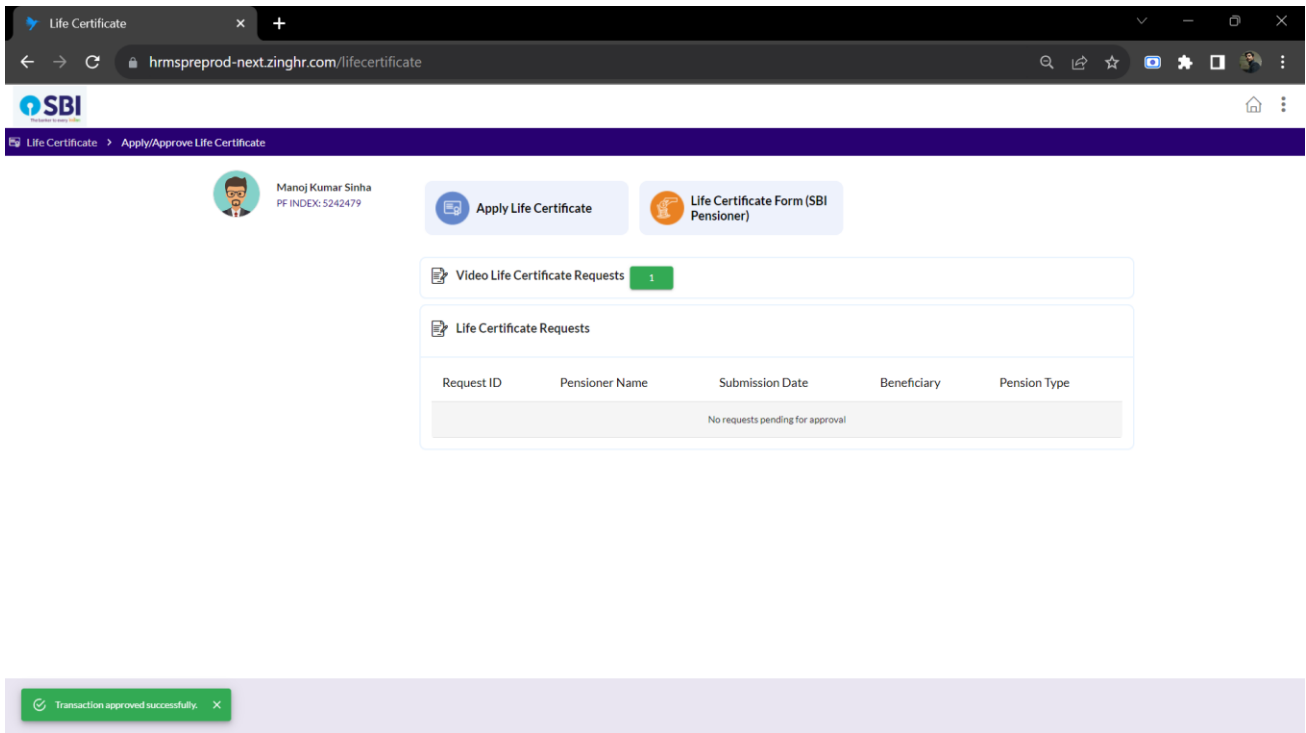
The screenshot shows the 'Life Certificate Approval' interface. On the left, a sidebar displays the user profile of Manoj Kumar Sinha (PF INDEX: 5242479) and navigation options: 'Apply Life Certificate', 'Life Certificate For Pensioner', 'Video Life Certificate Requests' (1), and 'Life Certificate Requests' (1). Below this is a table with one entry:

Request ID	Pensioner Name	Submission Date
LC002275077	Shri. Ganesh V Hegde PF INDEX: 6119549	23-Nov-2023

The main panel shows the details for Request ID LC002275077. The pensioner is Shri. Ganesh V Hegde (PF INDEX: 6119549), submitted on 23rd Nov 2023. Transaction details include: Request ID: LC002275077, Mode: Branch Visit, Branch Detail: GTC BELAPUR(04430), Submission Date: 23-Nov-2023, Valid Till: 31-Oct-2024, Status: pending, and Transaction By: Shri. Pramod Kumar Arora (PF INDEX: 6382711). The remarks state: 'Applying on behalf Ganesh for testing.' The approver is Shri. Manoj Kumar Sinha (PF INDEX: 5242479). A 'Remarks' field is present with the placeholder text 'Enter your remarks here'. At the bottom right, there are 'Reject' and 'Approve' buttons.

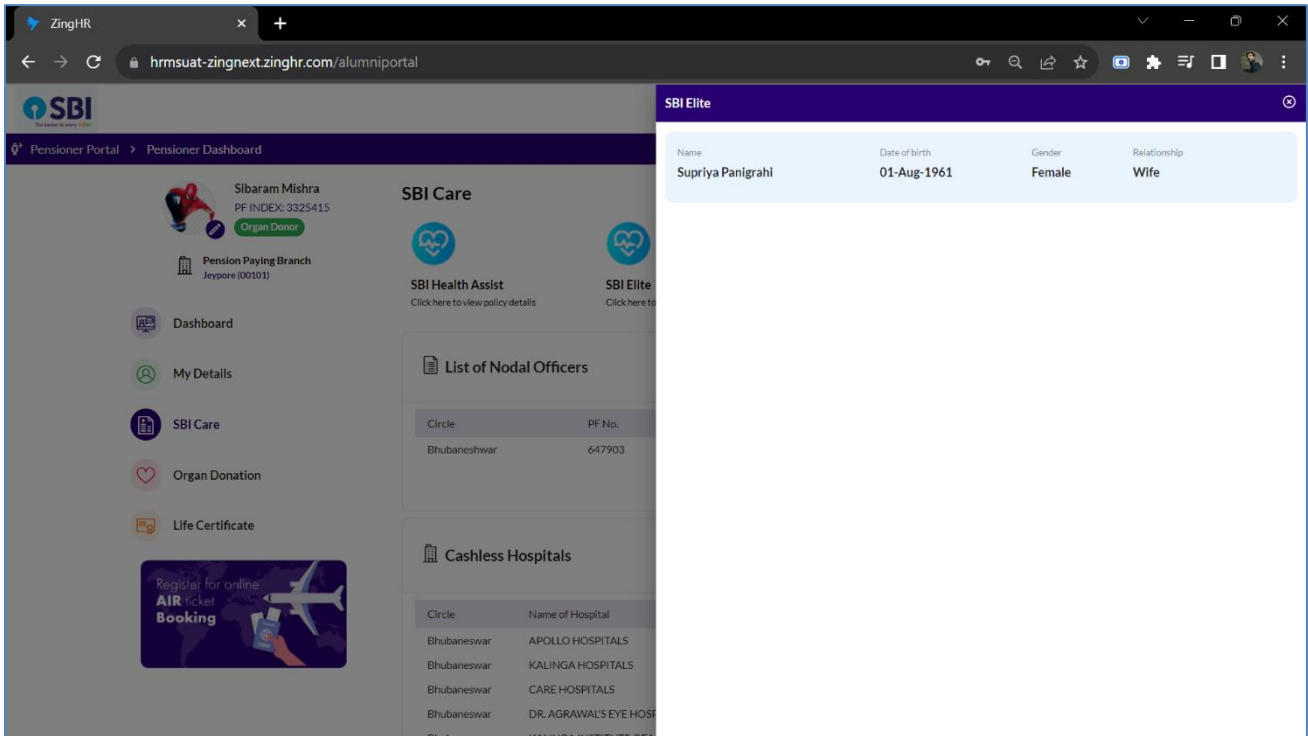


This screenshot is identical to the one above, but the 'Remarks' field now contains the text 'Approval process testing.' The 'Approve' button is highlighted with a checkmark, indicating the request has been approved.



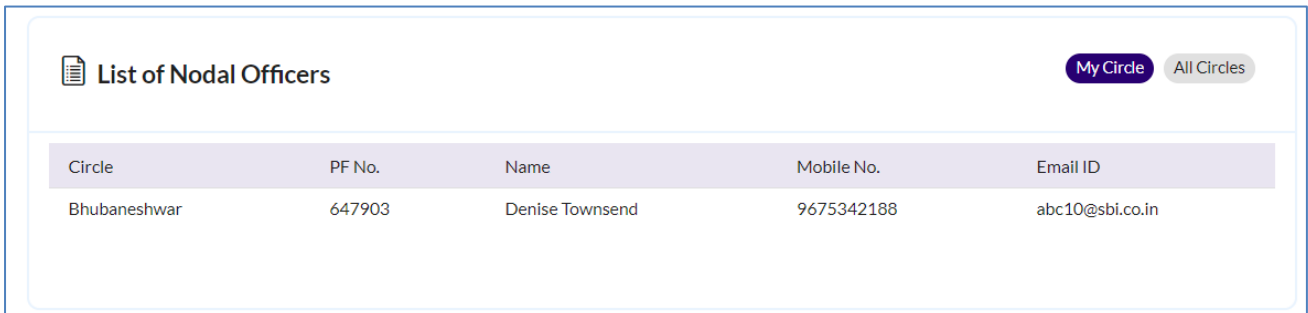
2.3.2 SBI Elite:

Explore premium services offered by SBI for elite customers, such as exclusive banking privileges, dedicated relationship managers, and personalized financial solutions. This screen access will only be given for CGM and above.



2.3.3 List of Nodal Officers:

Easily locate and contact Nodal Officers responsible for resolving specific banking or service-related issues, ensuring prompt solutions to your concerns.

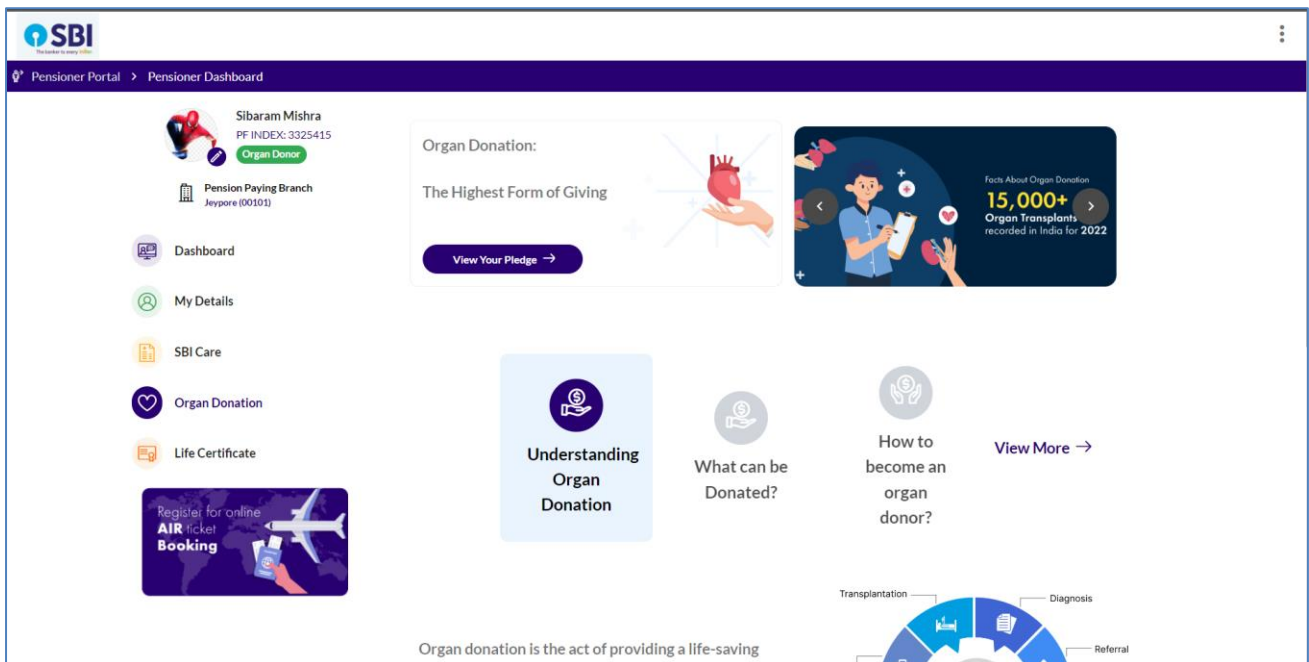


2.3.4 Cashless Hospitals List:

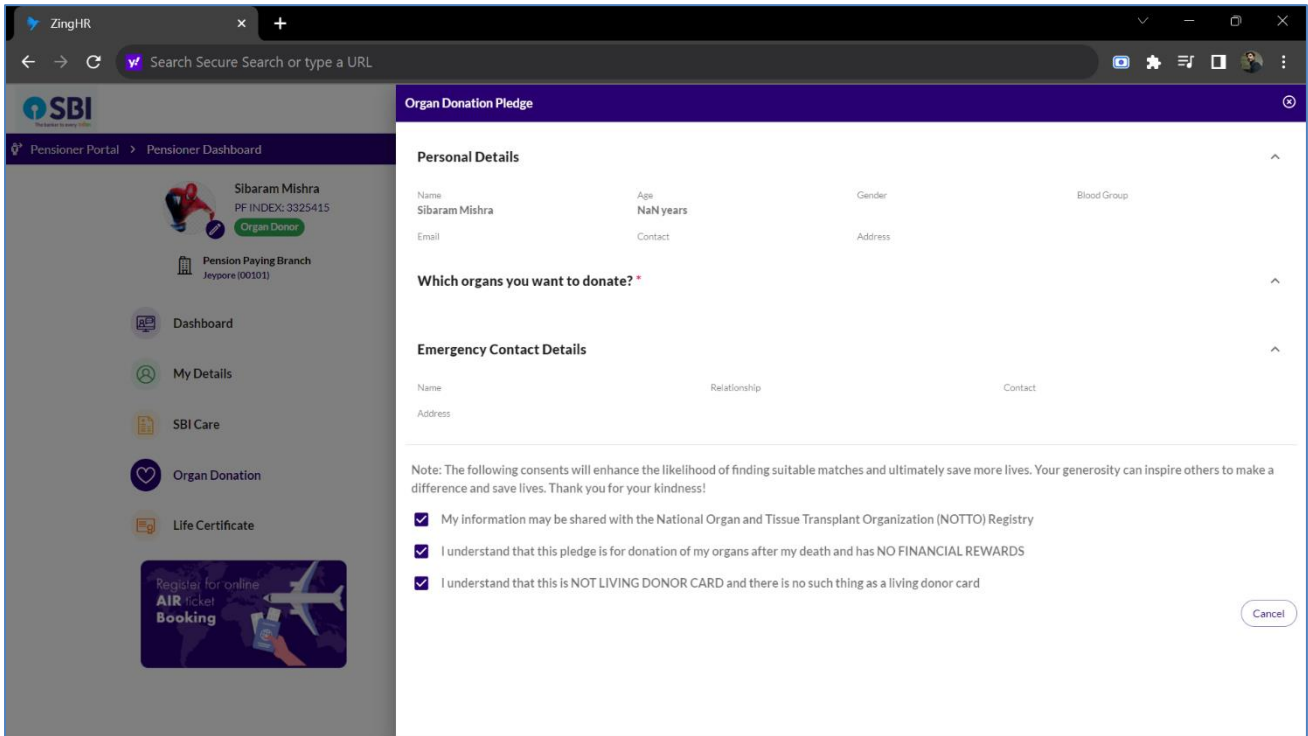
Access a comprehensive directory of affiliated cashless hospitals for seamless health insurance claims. Find the nearest network hospitals for medical treatments without the hassle of upfront payments.

2.4 Organ Donation

Conveniently register for organ donation, contributing to a noble cause. Track and manage your organ donation preferences securely. **View your pledge/ Take a pledge** to submit the details.

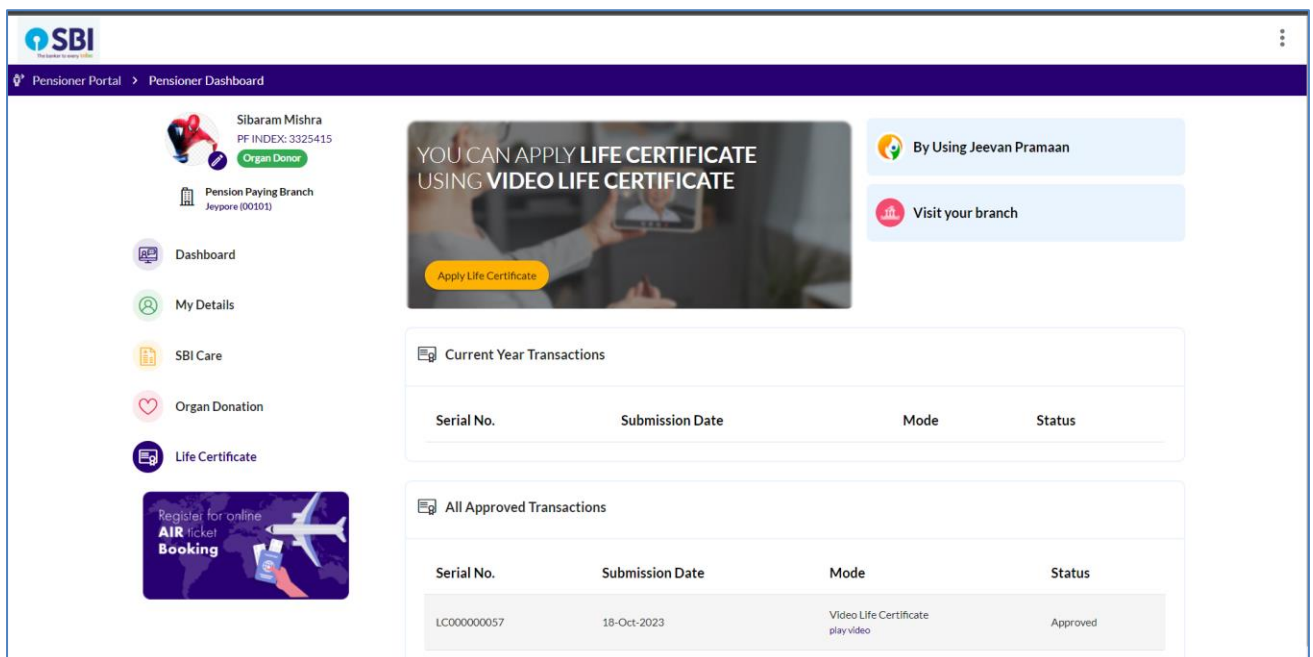


By providing your consent for organ donation, you increase the chances of finding suitable matches and ultimately saving lives. Please note that your information may be shared with the National Organ and Tissue Transplant Organization (NOTTO) Registry. This pledge is specifically for the donation of your organs after your death and carries no financial rewards. It is essential to understand that this is not a living donor card, as no such card exists. Your commitment to organ donation is a compassionate act that can have a profound impact on the lives of those in need.



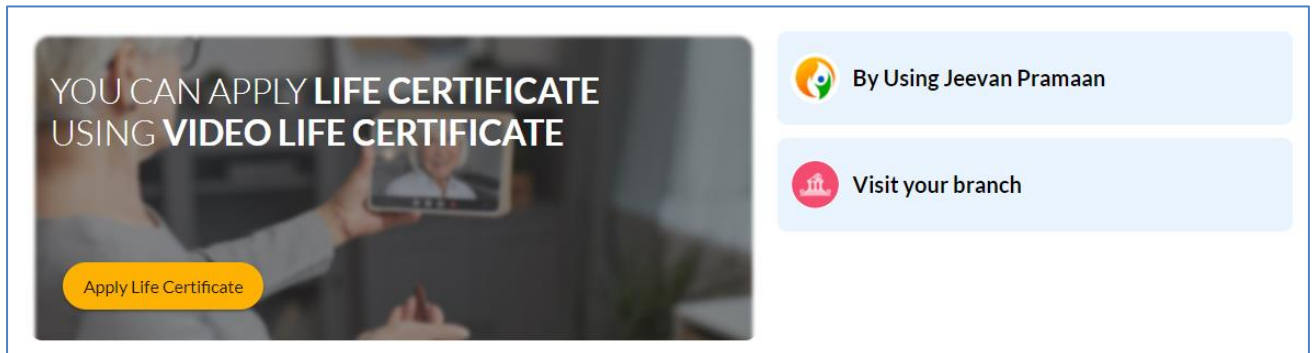
2.5 Life Certificate

Streamline the submission of life certificates through a user-friendly interface. Set reminders and receive notifications to ensure timely compliance with pension requirements.



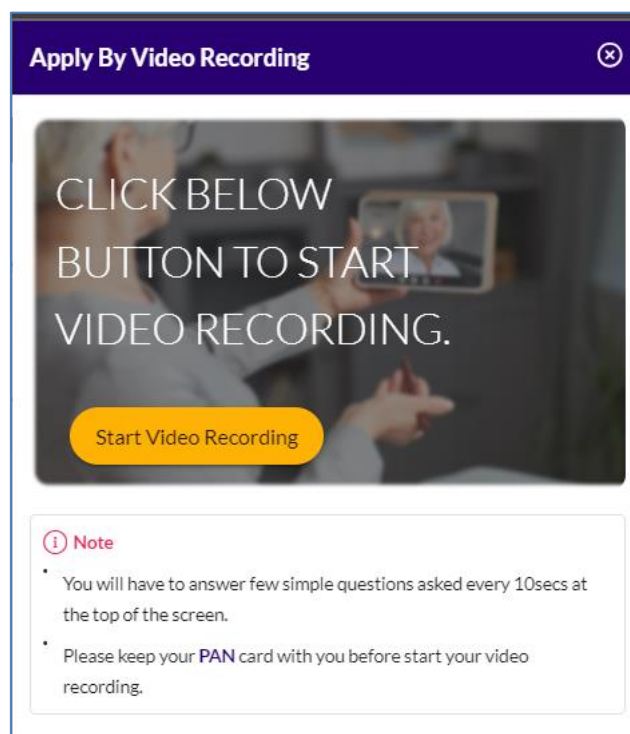
1. Apply Life Certificate

Apply via the online government portal of Jeevan Pramaan or download a hard copy of the form to share with the nearest branch.




The banner features a background image of a person holding a smartphone. The text reads: "YOU CAN APPLY LIFE CERTIFICATE USING VIDEO LIFE CERTIFICATE". Below this text is a yellow button labeled "Apply Life Certificate". To the right of the banner are two light blue buttons: "By Using Jeevan Pramaan" (with a Jeevan Pramaan icon) and "Visit your branch" (with a branch icon).

If we select the process via HRMS then click on “Apply Life Certificate” and keep the documents required. This will initiate with video recording.




The screenshot shows a mobile application interface with a purple header titled "Apply By Video Recording" and a close button. The main content area has a dark background with the text: "CLICK BELOW BUTTON TO START VIDEO RECORDING." Below this is a yellow button labeled "Start Video Recording". At the bottom, there is a white box with a red information icon and the heading "Note". The note contains two bullet points: "You will have to answer few simple questions asked every 10secs at the top of the screen." and "Please keep your PAN card with you before start your video recording."

Once video part is completed, you can now see the status in “Current Year Transactions” furthermore in the “All Approve Transactions”.

 Current Year Transactions

Serial No.	Submission Date	Mode	Status
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 All Approved Transactions


Serial No.	Submission Date	Mode	Status
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LC000000057	18-Oct-2023	Video Life Certificate play video	Approved
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2.6 Online Booking for Air Travel

Online Booking for Air Travel within the Pensioner Module offers a convenient gateway access to renowned travel services such as "Akbar Travel" and "Balmer Lawrie & Co. Ltd." Pensioners can seamlessly utilize our portal to access and use these trusted travel sites, ensuring a hassle-free and user-friendly experience for planning and booking their air travel. This feature provides pensioners with a streamlined process to arrange their journeys with the reliability of well-established travel service providers.


Online Booking For Air Tickets
✕




Sibaram Mishra

PF INDEX: 3325415

Email: aswin.dev@secureyes.net Mobile: 7842417582


Akbar Travel


Balmer Lawrie & Co. LTD

Consent & Undertaking

1. I am desirous of availing the Online Air Ticket Booking service for staff pensioners/ family pensioners. To avail the service, I hereby give my consent for sharing my details (Name, PF ID, Mobile Number and E-mail ID and any other contact details necessary), as updated in HRMS, with the empaneled Travel Agencies. I will declare the list of my family members for whom I shall book tickets on the portal of the Travel Agencies.
2. I undertake that I will use the facility for my genuine personal purpose and for the declared family members only. In case of any misuse of the facility is reported and/or the facility is used for commercial purposes, Bank will be free to suspend the service for me and I undertake that any liability, damage, claim, loss etc. that the Bank may suffer or incur, on account of any acts of omissions on my part, shall be recoverable from me on first demand made by the bank. Such a demand shall be final, conclusive and binding on me. In addition to the above, Bank shall also have all rights available to it under applicable law and regulations.

I have read the content of the Consent & Undertaking and abide by the same.

- Consent submitted has been received by the bank and will be submitted to the Travel Partners. User login details will be provided on Email ID registered in HRMS. Once user login details is received Travel Agencies website may be accessed by clicking on the links shared above.
- Please not that the discount of (1.85% on Basic + YQ(fuel)) offer by M/s Balmer Lawrie & Co Ltd to the serving employees, will not be available for pensioners/family pensioners whole booking ticket through the portal of M/s Balmer Lawrie & Co Ltd.

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