

**Process flow – Processing of Family Pension**

**Stage 1: Application**

➤ Branch Maker should apply through Employee Self Service-> PF/Pension/Gratuity -> Pensioners Related Services-> Apply Family Pension.

The screenshot displays the Employee Self Service portal interface. At the top, there are navigation tabs: "Employee Self Service", "Manager Approvals", and "My Profile".

**Employee Self Service**

The main menu consists of several service tiles:

- Claim/ Reimbursements
- Earnings/ Salary
- Journey/Travel
- Leave/ Attendance
- Personal
- PF/ Pension/ Gratuity** (This tile is circled in red)
- Promotion/ CDS/ Career
- Scholarship/ Welfare
- Sundries/ Misc
- SBI GEMS Gems Details
- Sanjeevani HR Helpline

**Manager Approvals**

Below the main menu, there is a search bar: "Search by application name (minimum 3 letters)".

The "Pensioners Related Service" tile is circled in red. It contains the following sub-tiles:

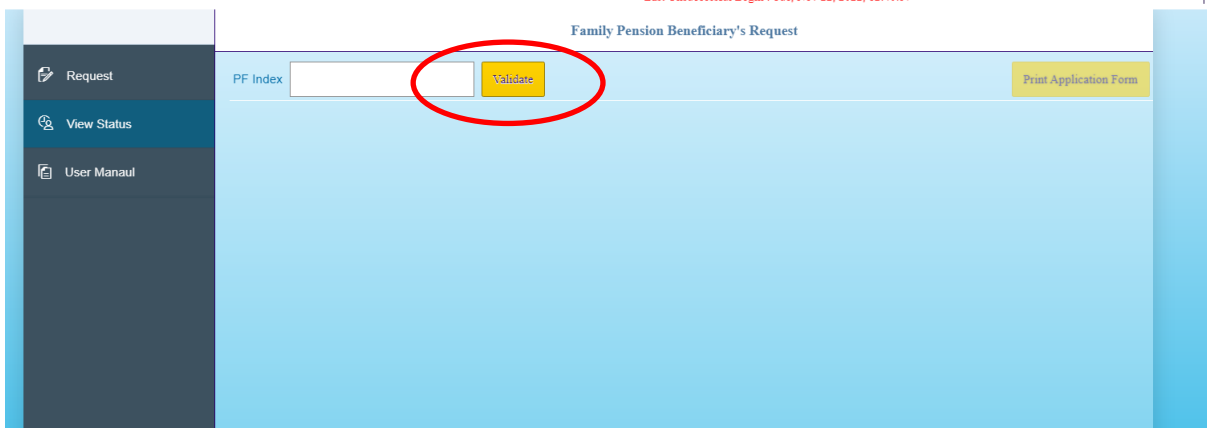
- Apply Gratuity ESS
- Gratuity Payment eABs
- Pension Proposal
- Pension Proposal eABs
- Pensioners Related Service** (This tile is circled in red)
- Update Pensioner Aadhaar
- Provident fund
- Extension of LFC/HTC Beyond retirement
- Apply consent u/s 194 (P)
- EMWS Apply
- SBI Health Care (REMBS) Apply

At the bottom, a sidebar menu is visible with the following items:

- Apply Aadhaar
- Apply Death Reporting
- Apply Life Certificate
- View Pension Slip
- View Pension Payment Advice
- View Pension Payment Advice eABs
- Apply Manual Pension Proposal
- Life Cert. Form - Non SBI
- Life Cert. Form - SBI Pensioners
- Life Cert. Form - SBI Family Pensioners
- Apply/ upload Pensioner Photo
- Extension of Staff Housing & Car Loans
- Apply Family Pension** (This item is circled in red)
- Pensioner Dependent Additional Details Apply

The main content area at the bottom has a search bar: "Search Pensioner PF Index No." with a search button.

- On entering PF index then clicking on 'Validate' available details will be fetched from system.



- Then, fill the beneficiary details (beneficiary name, relationship, mobile no, email etc.) on the input screen and upload scanned copies of requisite documents and submit.

The screenshot displays the form with the following sections:
 

- Pensioner's Detail:** Name (Sa...), Death Date (01/02/2022), Pension Paying Branch (BOLANGIR), Pension Payroll Area (PEN\_BHUBANESHWAR).
- Primary Beneficiary Details:** Beneficiary Name, Beneficiary Relationship (dropdown), Beneficiary Mobile No, Beneficiary Email ID.
- Upload Documents:** A yellow warning bar states: 'Each file size should not exceed 300KB and acceptable file types are .pdf, jpg, jpeg only'. Below are four upload fields: 'Upload Filled Application', 'Upload Pensioner's Death Certificate', 'Upload Beneficiary KYC', and 'Upload Beneficiary Photo', each with a 'Browse...' button.
- Submit:** A green 'Submit' button at the bottom right is circled in red.

- Maker can view the status of his / her request through HRMS Portal (Employee Self Service-> Pensioners Related Services-> Apply Family Pension ->View Status).

The screenshot shows the 'Request History' table with the following data:

Request Number	PF Index	Pensioner Name	Pension Paying Branch	Death Date	Applied Date	Status
FAM000000000025	10...	Sa...	BOLANGIR	01/02/2022	23/11/2022	Pending at BM Level
FAM000000000024	10...	Sa...	BOLANGIR	01/02/2022	01/10/2022	Approved
FAM000000000023	10...	Sa...	BOLANGIR	01/02/2022	01/10/2022	Approved

The 'Status' column for the first row is circled in red.

## Stage 2: Approval / Verification by Branch Manager - Level 1

- Branch Manager can view / download documents through Manager Self Service-> PPFG-> Pensioners Related Services Approval-> Approve Family Pension

Approval Request List

Approval Request List							
Approve Request View Request User Manual	Total Count 1						Search by PF Index
	Request Number	PF Index	Pensioner Name	Pension Paying Branch	Death Date	Applied Date	Status
	FAM0000000000025	10 [redacted]	S [redacted] Ray	BOLANGIR	01/02/2022	23/11/2022	Pending at BM Level

- Branch manager can approve or reject the application as applicable.

View Request Detail : FAM0000000000025

**Pensioner Detail**

PF Index	Name	Death Date	Pension Paying Branch	Pension Payroll Area
10 [redacted]	S [redacted] Ray	01/02/2022	BOLANGIR	PEN_BHUBANESHWAR

**Beneficiary Detail**

Beneficiary Name	Beneficiary Relationship	Beneficiary Mobile No	Beneficiary Email ID
a [redacted]	Wife	88 [redacted]	ad [redacted]

Uploaded Filled Application form: IMG-20211206-WA0002.jpg

Uploaded Pensioner's Death Certificate: IMG-20211206-WA0002.jpg

Uploaded Beneficiary KYC: IMG-20211206-WA0002.jpg

Uploaded Beneficiary Photo: IMG-20211206-WA0002.jpg

**Approver Detail**

Branch Manager Name	Branch Manager PF No
N [redacted] a	2 [redacted]
PPG Approver Name	PPG Approver PF No
As [redacted] ira	3 [redacted]

Approve Reject Close

## Stage 3: Approval / Verification at LHO PPG – Level 2

- Authorized user at PPG, LHO can view / download through Manager Self Service-> PPG->Pensioners Related Services Approval->Approve Family Pension

Approval Request List

Total Count 1

Search by PF Index

Request Number	PF Index	Pensioner Name	Pension Paying Branch	Death Date	Applied Date	Status
FAM000000000025	1	Sat, Ray	BOLANGIR	01/02/2022	23/11/2022	Pending at PPG Level

- Authorized official at PPG, LHO shall Approve or Reject as applicable. Accordingly, SMS / email will be sent to family pensioner and all concerned officials at Branch/LHO. However, before approving the Queue, the officer should make necessary changes in the SAP regarding details of family pension after due verification.

View Request Detail : FAM000000000025

**Pensioner Detail**

PF Index	Name	Death Date	Pension Paying Branch	Pension Payroll Area
10	Sat, Ray	01/02/2022	BOLANGIR	PEN_BHUBANESHWAR

**Beneficiary Detail**

Beneficiary Name	Beneficiary Relationship	Beneficiary Mobile No	Beneficiary Email ID
a	Wife	88	ad

Uploaded Filled Application form: IMG-20211206-WA0002.jpg

Uploaded Pensioner's Death Certificate: IMG-20211206-WA0002.jpg

Uploaded Beneficiary KYC: IMG-20211206-WA0002.jpg

Uploaded Beneficiary Photo: IMG-20211206-WA0002.jpg

**Approver Detail**

Branch Manager Name	Branch Manager PF No
N	2
PPG Approver Name	PPG Approver PF No
AS	3

Approve Reject Close