

**PROJECT SBI CARES**  
**AUTOMATION OF FAMILY PENSION PROPOSAL IN HRMS**

Please refer to Circular No. CDO/P&HRD/-PPFG/19/2016-17 dated 10<sup>th</sup> May 2016 regarding standard guidelines for the release of family pension.

2. Presently, the application for family pension is submitted at the Branch by dependent family member who is eligible for family pension of the deceased pensioner along with requisite documents viz:- Death Certificate and KYC documents etc., which is forwarded to PPG Department of the concerned LHO for commencement of Family Pension. The necessary approvals accorded after due verification and in turn feed the details of family pension in HRMS at LHO.

3. As a part of **Project SBI CARES Phase -II** initiatives, the facility for 'automation of family pension' has been envisioned for a quicker and hassle-free process. Accordingly, a new functionality has been developed in HRMS under **PF/Pension/Gratuity Tile**. All new applications for family pension shall be processed digitally through the new functionality in HRMS portal. Hence, it will expedite the release of family pension which in turn will bring much needed financial relief and solace to the family of the deceased retiree.

4. The detailed process flow for processing of Family Pension is enclosed as **Annexure-I**. The revised process shall be applicable from the date of this circular. The AGM (PPG) at Local Head Office shall be the nodal officer for providing necessary support to the branches in this regard.

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

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

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

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

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.