
(Courtesy "Pensioners' Pulse", a Quarterly House Magazine of S.B.I.Pensioners' Association (Bhubaneswar Circle)

A New Project 'HRMS' for Centralised Payment of Salary & Pension Processing

Please refer to Local Head Office Circular letter No.Cir.DO/HRMS/01 of 2009-10 dt. 01-05-2009 wherein detailed guidelines and instructions have been given for salary and pension payment of SBI Employees. For this purpose a Centralised Salary and Pension Processing Centre (CSPPC) has been set up at GITC Belapur under HRMS (Human Resource Management Solution). We append below the guidelines for pension payment for your information.

Guidelines for Pension Processing :

A) Data Validation and Audit : Since Pension for all SBI/IBI pensioners and family pensioners is already being processed and paid by all Circles through RHMS, correctness of data must have been ensured by the Circles. However, in view of the proposed centralized processing, Circles will be required to conduct a data migration audit before April 2009.

B) Data ownership and obtention of Life Certificate : The data ownership of all pensioners and family pensioners drawing pension through the branches under a Circle shall remain with the respective Circle (Branches). Branches where the pension accounts are being maintained shall continue to obtain the Annual Life Certificate from the Pensioners. For recording of Life Certificate, a facility through HRMS portal or through some other application will be provided to the branches shortly.

C) Data updation/modification and reporting changes : It is observed that in most of the Pensioners/Family Pensioners cases, only minimum data is available in HRMS. Since through HRMS whole Bank repository of all employees / ex-employees is being created. branches are advised to procure maximum data for Pensioners / Family Pensioners at the earliest. Details such as current address including e-mail address, telephone numbers, bank details, PAN number and family details etc. are important as availability of such information will not only help the Bank in communicating directly with pensioners but will also expedite the pension processing and disbursement of arrears, if any, TDS deposit and fixation of family pension. The data modification on account of change of pension status (Pensioner to family pensioner or change of family pensioners), account details, stoppage and restart of pension on account of non-submission/ submission of Life Certificate etc. will continue to be handled by the PPG officials at the LHO.

D) New Pensioners : Till such time the pension approval process gets fully automated under HRMS, whereby an employee will be automatically converted into pensioner and his pension fixation will be done in HRMS system itself. Circle will use the existing RBPAS system only for the pension sanction process for new pensioners / family pensioners. On approval/sanction PPG officials at LHO will feed the pension / family pension and account details of such new pensioners/ family pensioners into HRMS system from the date of their becoming pensioner/family pensioners. No payment of pension or any arrear should be made from outside HRMS.

E) Timelines : HRM envisages pension processing and payment for all SBI/IBI pensioners/ family pensioners on a single day every month. it is therefore important to observe discipline in submitting changes by the following due dates.

1. Changes in Pensioners data to be advised to LHO by - 18th of every month.
2. Dry run of Pension for the current month at CSPPC - 22nd of every month.
3. Verification of Pension details by PPG officials at LHO by - 24th of every month.
4. Final Pension processing at CSPPC - 25th of every month.
5. Credit to Pensioners accounts and debit to CAO - 26/27th of every month.

6. Deposit of Statutory Deductions viz. Income Tax etc. - Last day of the month.

F) All credits to Bank accounts only : It is mandatory that pension is credited to a Bank account only. No Banker's Cheques will be issued except in the case of attachment orders etc. All pensioners/family pensioners, therefore, should maintain pension accounts with any branch of the Bank. Pension will be paid by debit to CAO Kolkata, for which an interim account will be opened by CAO Kolkata and funded for the pension payment on 25th of each month based on the pension processing report generated from HRMS.

G) SBILIFE Deductions : Since SBI Life Group Insurance Scheme for SBI Staff is available till the member attains 65 years of age, many pensioners would be members who would like the premium to get deducted from monthly pension itself. While for the new pensioners such option may be obtained at the time of application for pension, for those who have already retired, SBI Life shall arrange for one time option authorizing Bank to deduct the premium from the pension.

H) Payment of Arrears, if any : Since pension for all employees through HRMS is being processed from April 2008 pension arrears, if any, on account of revision etc. prior to April 2008 would be processed by the respective branches/Circles manually upto March 2008 and advised to HRMS cell for payment alongwith the next month pension. Circles which have gone live for pension prior to / after April 2008 shall be required to calculate such arrears till the month of go-live or upto March 2008 depending upon their convenience. Branches are advised to desist from making payment of such arrears directly at their end in order to avoid Income Tax calculation related problems.

I) Reporting of Death of Pensioners : HRMS shall be providing the facility of recording date of death of any pensioner/family pensioner to the Branch Managers through the portal. However, till such time this facility gets developed, branches will report the death to the PPG Department at LHO, who will record the date of death in HRMS. Pension/Family Pension will automatically get stopped from the recorded date of death. However, in cases where the reporting is late and there is recovery of pension/family pension from the late pensioner's/family pensioner's account, branches will manually refund the amount to CAO Kolkata on receipt of advice from CSPPC or the PPG Department at LHO.

J) Income Tax and Submission of Investment Declaration : Income Tax on the pension paid to all pensioners will be handled through HRMS. PPG Department will obtain investment details latest by October each year from those pensioners who qualify for TDS and key in the data in HRMS. For submission of investment proof and its verification, separate instructions will be issued in due course. Income Tax projections report will be available for each pensioner with the PPG Department and also in individual's Pension Slip generated from HRMS each month. Form-16 will also be made available to all pensioners through HRMS portal and also in paper printed form duly signed or digitally signed by the Drawing and Disbursing Authority. Form-24 will also be made available to the branches through FTP site.

K) HRMS Portal to Pensioners : In order to make out ex-employees feel part of the institution which they proudly served till their superannuation or retirement, the facility to access HRMS portal will be extended to the retired employees as well in due course of time. Efforts are in hand to provide access to other in-house web-sites like State Bank Times, P & HR site through HRMS portal as well. Once the portal gets fully developed, such pensioners will not only be able to view their pension details but also will remain connected to the developments taking place in the Bank.