FREQUENTLY ASKED QUESTIONS ON EMPLOYEES INFORMATION SYSTEM (EIS) MODULE

(Users are welcome to send more questions as well as their answers to add up to this compilation of FAQs over email to sys@nic.in. Please give "FAQs" as subject while sending mails in this regard)

Users may send their Queries/issues/problems related to EIS module to ITD on email pfms-eis@gov.in

PRE-REQUISITES FOR ONBOARDING ON EIS

1. **Question: What are the pre-requisites for a DDO to onboard EIS Module?**

   Answer: For coming on board EIS module of Public Financial Management System (PFMS), the following are the pre-requisites:

   (i)   The DDO & PAO must have six digits DDO Code & PAO Code respectively issued by the office of the Controller General of Accounts, Department of Expenditure, Ministry of Finance, Government of India.

   (ii)   The DDOs in which EIS is to be rolled out must have their PAOs on the PFMS portal.

   (iii)   DDO wise budget must have been allocated by concerned PAO. On the basis of DDG entered by Pr.AO, PAO has to enter function head wise budget figure in respect of DDOs falling under its payment control.

   (iv)   Users in DDO viz. DDO, DDO Checker and DDO Maker must have been registered on PFMS portal.

CREATION & APPROVAL OF USERS

2. **Question: Who are the users required for working in EIS Module?**

   Answer: Following are the users in DDOs who will be registered on PFMS for working in EIS Module:-

   a) DDO CHECKER
   b) DDO MAKER

3. **Question: Is it compulsory to create DDO Maker and Checker for working in PFMS?**

   Yes, all the DDOs irrespective of DDO Type have to create DDO Maker and Checker for working in EIS.

4. **Question: How the users in DDO will be registered on PFMS portal?**

   Answer: DDO (if not already registered on PFMS) will be registered from Home page of PFMS. On the right hand side, one hyperlink **"Register Sanction ID Generation**

Users" is available. A form for Registration will appear on clicking this link.   DDO user will fill in information in all the fields and press "SUBMIT" button. System will display a message for successful registration.

-Registration of DDO user will be approved by concerned PAO user.

-DDO user will log in PFMS portal with his credentials and register the users "DDO CHECKER" and "DDO MAKER USER" through the option:

"USER MASTER" > "MINISTRY USER REGISTRATION"

-Registration of "DDO CHECKER" and "DDO MAKER" will be approved by DDO user through the option:

"USER MASTER" > "MANAGE USERS"

5. **Question: DDO Checker and DDO Maker users have been registered on PFMS portal. Users are not still not able to work in EIS module as the system is not allowing access to EIS. How can we access EIS portal?**

    Answer: Once the login ids for DDO Checker and DDO Makers have been created and approved by DDO, they can log in to PFMS. However, initially they will not be able to access EIS portal. For this, DDO has to request IT Division by sending an email on pfms-eis@gov.in, mentioning therein Controller Code, PAO Code and DDO code.

6. **Question:How to retrieve login ID and Password in case of forgot?**

    Answer: Login ID details are available to DDO's Login under the option:

    "Users Masters" → "Manage User".

    To recover password, use the link "Forget Password?" link provided on the Home Page of PFMS (https://pfms.nic.in).

MASTER SERIES CREATION

7. **Question: What are the different Master Series/Data & at which level it is created before starting Initial Data Entry of Employee details?**

    Answer. Following Master Series/Data are required to be created before starting Initial Data Entry of Employeedetails:

    a) **DDO Office Address**: DDO Maker using option:
    Establishment>DDO Profile>DDO Office>Main Office

    b) **Mapping Designation:** DDO Checker using option:
    Establishment>Utilities>Map Designation

    c) **GPF Series**: PAO User in PAO using
    EIS>Reference Data>GPF Series

d) **Master Custodian(for Govt. Quarters)**: PAO User in PAO using EIS>Reference Data>Mater Custodian

e) **Non Govt. (NG) Recovery Types**: DDO Maker
PayBill>Pay Bills>Non Govt. (NG) Recovery>Creation of NG Recovery Types

8. **Question: How to enter Master Data for Custodian and GPF Series in respect of DDOs working on EIS Module?**

   Answer: **Creation of Master Series at PAO User Level:**

   a)   **GPF SERIES:**

   "Employees Info. System" > "Go to EIS" > "Reference Data" > "GPF Series"
   System generated P.F. Series code will be displayed. PAO user has to enter P.F. Series.

   b)   **CUSTODIANS:** If the Department/Ministry have their own Quarter Pooling, the creation of custodian will be done by respective PAO of the DDO. The custodian 'Directorate of Estate' is default custodian in the EIS system.
   "Employees Info. System">"Go to EIS">"Reference Data">"Custodian Master"

   System generated **"Custodian id"** will be displayed. PAO user has to select **"Custodian Department"** from drop down menu. Thereafter, he has to provide **"Custodian Description"** and **"Receipt Scheme Code".**

   Note:
   In case of Merged DDOs, GPF Series will be entered by concerned DDO Checker through the option:
   "Establishment" > "Utilities" "PF Series for Merged DDO".

   PF series for state AG's/Other will be entered by concerned DDO Checker through the option:
   "Establishment" > "Utilities" > "PF Series for GPF (State/Other)

9. **Question: Why is the system displaying error while making entry of Address details in Main office of the DDO?**

   Answer: Don't use any Special Character in the office address details and field 'Taluka' is not applicable in details.

10. **Question: How can we map our sub-field offices who maintain separate PBR for their employees?**

   Answer:DDO Maker can add Sub-ordinate Office using option:

   "Establishment" > "DDO Profile" > "DDO Office" > "Sub-ordinate Office"

   Bill Groups can be created Offices wise.

UPDATION/CHANGE IN BASIC/PRIMARY DATA

11. **Question: Details of PAN and AADHAR were skipped at the time of entry in Personal Details, Now, how to enter this information?**

    Answer: To enter this information go to:

    "Changes >"Change in PAN or Change in Aadhaar".

    Changes will be effective only after verification by DDO Checker.

12. **Question: I have started entering data of an employee. PAN number of employee is not available. Will system allow me to save his record?**

    Answer: System will allow you to save the record but display a warning message that if the PAN number is not provided within 90 days, salary for this employee will not be generated by DDO. Hence, it is mandatory to enter PAN number within 90 days otherwise system will not allow processing of salary in respect of that employee.

    However, PAN Number in respect of "Deputation In" employees is mandatory to be entered.

13. **Question: At DDO Maker level, while filling up the "Posting Details" of an employee, the desired designation is not available for selection under the field "Current Post in the Office (Designation).**

    Answer: At DDO Checker level, a "Common Designation Master" is available through which designations, as per requirement, may be mapped. The designations once mapped by DDO Checker of any of the DDOs under same controller, will be available to all DDO makers of all DDOs under that controller.

    For this, DDO checker will go to"

    "Establishment" > "Utilities" > "Map Designations" > "Designation Details"

    After selecting the Group of Post (i.e. A, B, B N Gz, C, or D) from drop down menu, user has to select initial alphabet of the nomenclature of post. All the designations starting with that particular alphabet will appear for selection under the field "select Designation". Designation Code and Superannuation Age in respect of that post will automatically be displayed by the system. Press the button "SAVE" to save the record.

14. **Question:At DDO Checker level, I am not able to map desired designation as same is not available for selection under the field "Designation Details" under Utilities.**
    How can I map such designation?

    Answer: In case, a particular designation is not available for mapping at DDO Checker level, DDO has to request ITD on email id pfms-eis@gov.in,mentioning therein the information in respect of following fields:

a. Description (Nomenclature) of Designation
b. Group of Designation (i.e. A, B, B NGz, C or D)
c. Valid Age of Superannuation

15. <u>Question</u>: **While making entry under the tab "Pay Details" for an employee, I am not able to view pay level 13 (new revised)?**

<u>Answer: -</u> For selection of Pay Level 13 (new revised), you will have to scroll down the list of Pay levels available in drop down menu till the last as it is made available at the bottom after Pay level 18. The old Pay level 13 has been renamed as 13O ("O" stands for old).

16. <u>Question</u>: **What is the process to change the data of personal details in respect of Locked and verified employee?**

<u>Answer:</u>
 i) **If no pay bill has been processed** for this employee, unlock the details using DDO Checker Login through the option:

"Establishment"> "Utility"> "Unlock Employee Details".

-Then make required changes at DDO MakerLevel and verify the same at DDO Checker Level.

ii) **If bill has been processed** then Personal Details of Employees Master Data can only be changed through the option:

"Establishment" >"Changes".

Changes will be effective only after verification by DDO Checker.

CGEGIS

17. <u>Question</u>: **What should be the CGEGIS Membership Date in case of a New Employee joined after 1st January?**

<u>Answer:</u> User can skip CGEGIS Membership date of employees who have joined after 1st January. System willdeduct the subscription for insurance fund automatically. On 1st January of next year DDO Maker can reset CGEGIS membership date through the option:

"Pay Bills" >"Rules for Employees" >"Reset CGEGIS Membership Date"

This requires to be verified by the DDO Checker before processing of the pay bill.

18. **Question: How to change CGEGIS next year in case of employees promoted from one group to higher group after 1st January in previous year, as the system is deducting old amount of CGEGIS.**

    Answer: On 1st January of next year user can reset CGEGIS membership date for these employees for full deduction through the option:

    Pay Bills >Rules for Employees > Reset CGEGIS Membership Date.
    This is required to be verified by the DDO Checker before processing of the pay bill.
    All the employees whose designation group and CGEGIS group are not matching are available for modification in this form

LOANS/ADVANCES

19. **Question: During the entry of any Loan/Advances under page 'Loan Already Taken', the option 'Select loan' is not working.**

    Answer: User has to press the button **'New'** available on the page:

    Loan/Advances > Loan Already Taken.

20. **Question: What is the process to enter recovery of Interest of any loan, when principal amount recovered?**

    Answer: User should first go to advances already entered and selectthe particular advance and clickInterestoption.

21. **Question: How to enter GPF Advance if the recovery of GPF advance is already going on?**

    Answer: User should first go to advances already entered and select GPF advance, system will display message about previous outstanding. Press ok and enter the new details of GPF advance. Clubbing of GPF advance is possible. Whenever sanction details are entered for a new GPF advance it will automatically be clubbed with previous.

22. **Question: What is the process to correct Last Installment No. paid for any loan already taken by the employees?**

    Answer: Go to the option:

    "Establishment" > "Loan/Advances" > "Change in Last Installment No. Paid"

23. **Question: If an employee wants to revise his loan recovery schedule.   How it will be entered on EIS?**

    Answer: To enter the revised loan recovery schedule, go to the option:

    "Establishment" > "Loan/Advances" > "Revision in Recovery Schedule".

PROCESSING OF SALARY /SUPPLEMENTARY BILL

24. **Question: I am a new user. As DDO Maker, I have started entering data of employees. How can I generate paybill for the employees?**

    Answer: Please click on the **'Read Me'** link on the menu page of EIS. Detailed instructions have been given about the steps to be followed in order to generate the pay bill.

25. **Question: An employee has joined on 2nd of amonth after transfer from other DDO. Why is the regular salary bill of the employee less by one day?**

     Answer: At present 'Supplementary Bill' will be processed for the salary of one day through the option:

    "Pay Bill" > "Pay Bills" > "Generate Supplementary Bill".

    Regular bill will be only for the period from 2nd (date of joining in new office) to end of month.

26. **Question: How to enter exceptional allowances viz. Qualification Pay, Training Allowance etc. as the system is showing message 'Allowance is not applicable'?**

    Answer: User should first use the option:

"Pay   Bills"   >   "Rules   for   Employees">   "Eligibility   for exceptionalAllowances/Deductions for specific employees"

He should add these allowances for the eligibleemployees through this option, and then enter amount against these allowances using the option '7th PayAllowances and Deductions' under 'Rules for Employee' tab.

27. **Question: Any Specific Allowance applicable in a particular office is not available in "Eligibility for exceptional Allowances/Deductions for specific employees".**

Answer: In case, a **Specific Allowance** is not available **in** "Eligibility for exceptional Allowances/Deductions for specific employees" form, DDO has to request ITD on email id pfms-eis@gov.in,mentioning therein the information like Description of the Allowance and validations to be inserted related to that Allowance.

28. **Question: What if Dearness Allowance, CGEGIS, CGHS, and NPS Tier I is not reflecting in the page 'View Draft Salary'**

Answer: Apply Rules for the employee(s) using the option:
"Pay Bills">" Rules for Employees">" Apply Pay Rules to Specific/All Employees" as the case may be.

29. **Question: If any employee is on Extra Ordinary Leave (EOL) in current month, then how will be calculated salary for the period of EOL**

Answer: Enter Extra Ordinary Leave of current month in Establishment >Leave Sanctioned and get it verified by the Checker. The regular salary bill should be processed after verifying leave by the DDO Checker. It will be reflected in the salary bill of the employees.

30. **Question: After 'Check and Lock Data' of any employees at checker level, if employee is not available for attachment in any Bill Group at Maker Level, what may be the reason?**

Answer: Bank Account Number may be checked for its correctness.

31. **Question: How to process Recovery of Excess Payment from the salary?**

Answer: "Establishment" > "Loan/Advances" > "Recovery of Excess Payment"

32. **Question: When should the pay rules to be re-assigned for an employee?**

Answer: Pay rules should be re-assigned whenever:

a) Any change has been made in the eligibility for exceptional allowances/deductions for any employee.
b) Any changes in CGEIS, CGHS details have been done using '**Change Module'.**
c) Any deduction like CGEIS, CGHS, NPS is not being shown correctly in draft salary.

33. **Question: In the 'Attach/Detach Employees to Bill Groups 'form, I am not able to see some employees whose details I have already entered.**

    Answer: Only those employees can be seen in the attach/detach form for whom ALL of the following conditions are true:

    a) Data of all tabs entered, bank details are entered correctly and the data is checked and locked by DDO Checker.

    b) The bank details have been verified by PFMS, and PFMS unique code has been generated.

      User can check the same through the report available in "Pay Bill" > "Bill Groups" > "Attach/detach employees to Bill Group" > "Click here to see list of employees without PFMS Unique Code".

    In addition to above, following may be the reasons for non-availability of employee in the "Attach/Detach Employees to Bill group form":-

    c) An employee will not be available for attaching to a particular bill group if he/she is already attached to another bill group.

    d) If the employee does not satisfy the attributes you have defined for the bill group.   For example while defining properties of a bill group you may have selected 'Group A' employees only and the employee you are trying to attach is a group 'B' employee.

    e) You may select a particular office for the bill and employee may belong to another office (applicable only if DDO has more than one office/sub office)

34. **Question: How can I know for which employee(s), 'PFMS unique Code'   has not been generated?**

    Answer: Please check the report **"Employees without PFMS Unique Code"** under:

    "Establishment" > "Employee" > "Employees without PFMS Unique Code"

35. **Question:When should an option to delete a pay bill to be used?**

    Answer: The delete bill option can be used only if the bill is at processing stage or has been rejected by DDO Checker. As far as possible, you should re-process the bill if there is some error in it.

36. **Question: I am not able to detach a particular employee from a bill group (or attach a new employee to the bill group). What should I do?**

    Answer: If any pay bill for the particular bill group is pending for action either at Checker/PFMS or PAO level, you cannot attach/detach employees to the bill group

until the complete cycle for the bill is over. If the bill is at 'Bill Processed' or 'Bill rejected by Checker /PFMS/PAO', stage, then attach/detach to bill group is allowed and system will force Checker to re-process the bill.

For example, if a bill group has 15 employees attached to it and salary bill is processed and forwarded to DDO Checker. If we allow the checker to detach some employee from it or attach additional employees to it, these employees will not be reflected in the bill already processed and there will be mismatch in no of employees. So system will not allow any changes in bill group until previously processed bill is complete. However if the change is genuine, then bill can be rejected at whichever level it currently is. Once the bill is rejected, required changes in bill group can be made and the bill should be re-processed.

Note: Please read instructions on the Attach/Detach form carefully and also the Messages being displayed on the screen".

37. **Question: When is a Pay bill required to be re-processed?**

Answer: Reprocessing of Pay Bill is required in case any of the following changes have been made after processing of the paybill:

a) You have attached /detached some employees to the bill group after processing
b) You have made any changes in the dues/deductions of one or more employees in the bill group after processing of the bill.
c) You have made changes in Government quarter allotment/vacating details for any employee.
d) You have made any changes in the eligibility for exceptional allowances/deductions for any employee.
e) DDO Maker/Checker decides to reprocess it

Note: Please note that in case of b), c), d), you must re-assign the pay rules for the employees(s) in respect of whom changes were made.

38. **Question: How a "NIL" bill for NPS is to be processed in EIS?**

Answer: There is no need to process "NIL" bill for NPS on EIS. Once the salary bill in respect of NPS employees has been passed and voucher generated at PAO level, system will automatically generate a "NIL" Bill against that salary bill which will be available at DH user level for receiving.

Note: There is no need for PAO to make Transfer Entry for "NIL" Bill of NPS in respect of DDOs who are using EIS for processing of salary bills.

39. **Question: A bill has been processed at DDO Maker level but pending for forwarding to DDO Maker in respect of an employee who was on leave for full calendar month. System is allowing him Transport Allowance. How to remove this?**

Answer: At DDO Maker level, while forwarding the bill to DDO Checker through the option "Pay Bill" > "View and Forward Pay Bill", an option **"Remove Deduction/TA from the Bill"**is available. Click on this option.

List of deductions to be removed will appear.

Check the box given against the deduction to be removed and press the button "Save and Redisplay".

System will display a warning message for confirmation of removal as once a deduction is removed, operation cannot be reverted.

The desired deduction will be removed.

Click the button "Regenerated MTR19".

ANNUAL INCREMENT

40. **Question: How to stop Next Increment, for example in case of an Accountant who has not qualified Departmental Confirmatory Exam and hence not eligible for annual increment?**

Answer: At the time of Release of Annual Increment, user can skip the employees who are not eligible for annual increment due to certain reasons.

STATUS OF PAYMENT

41. **Question: How the status of a payment can be viewed on PFMS?**

Answer: A provision for **"TRACK PFMS TRANSACTION"** has been provided in PFMS at every user level under sanction for tracking the transaction. For this purpose following steps may be followed:

-Go to **"CAM REPORTS"** >Payments>**"PAY02- SANCTION EPAYMENT STATUS DETAILS** "

-Copy **"PFMS Transaction id"**

-Go to **"SANCTION' > "TRACK PFMS TRANSACTION"**

-Paste "PFMS Transaction id" and press "Search" button.

The details related to Sanction, Acknowledge of Bank (Payment File), Bank Transaction Status (payment), Scroll Status along with UTR number will be displayed.

42. **Question: How can a vendor know the status of his payment made through PFMS?**

Answer: A vendor can view his payments by entering the details of his Aadhaar number or Bank Account Number. On home page of PFMS, a link **"KNOW YOUR PAYMENTS"** has been provided on the left side. Click this link. Enter your Aadhaar Number. Confirm the same. Enter the text shown above and press "Search Button".

A vendor can also know his payment using his bank account details. For this, he has to click the hyperlink given below in blue colour **"KNOW PAYMENTS BY ACCOUNT NUMBER".** Enter first few characters of Bank's Name in the field **"BANK"**. Bank's name will be displayed for selection. Enter your Bank Account Number. Confirm Bank Account Number. Enter the letters shown in the image above and press "Search" Button.

Payment details showing the Beneficiary Name, Scheme Name, Purpose, Agency Name, Amount, UTR No., (Bank Txn ID), Bank Txn, Date, Status, Failure Reason, Credit Transaction ID, Credit date, UIDAsPerBank, AcctNumberAsPerBank, FavoringAsPerBank, BankIINAsPerBank will be displayed to vendor.

MISCELLANEOUS

43. **Question: What information is required to be entered on EIS to generate "Employee Id" in respect of an employee who is getting salary through EIS?**

Answer: For generation of Employee id, following personal information in respect of any employee is required to be entered on EIS:

   a. PAN NUMBER
   b. MOBILE NUMBER
   c. EMAIL ID

Once these information are entered on EIS, employee will receive a message on his registered mobile conveying him the username and password for his employee id. The username will be PAN Number and password will be date of birth in the format DDMMYYY which can be changed after first login.

44. **Question: What is the use of "Employee Id" in respect of an employee who is getting salary through EIS?**

Answer: Following are the advantages of "Employee id" on EIS:

   a. Employee can view data entered by his DDO in respect of details of his personal information, , Current Posting, Pay, PF/NPS, CGHS, Government

Accommodation, Loans, Leave, Suspension/Absconding, Eligibility for Allowance/ Dis allowance/Exemption etc.,

b. Employee can view his salary slip after selecting year and month.

c. Once GPF module on EIS is implemented (Under Development at present) , employee would be able to submit his request for :
-change of subscription
    -Application of GPF Advance
    -Application of GPF Withdrawal
    -Various other GPF related forms

d. Following reports related to GPF can also be viewed:
    -Ledger Card
    -Annual Statement
    - Final Settlement Status
    - Interest Calculation System

45. **Question: I am facing problem while working inEIS module. Whom should I contact to get support?**

Answer: Contact details of the officers of ITD dealing with various modules of PFMS are available on website **cga.nic.in** under the link **"Contact Us"**.

Users may forward their queries/doubts/issues to IT Division, O/o Controller General of Accounts, by sending an email on pfms-eis@gov.in, mentioning therein the description of problem, screenshots if required, and also the contact details of office and official forwarding the query/issue.

DISCLAIMER:-These FAQs are meant to provide general guidance to the users working on various modules of PFMS. The information provided in FAQs is subject to change and modifications at any time. Though utmost care have been taken to provide accurate information (accurate at the time of uploading), users are requested to bring into our notice the error, if they encounter any, so that the same can be rectified instantly. For detailed guidance, users may refer to the User Manuals, and also contact help desk staff.

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