

Tutorial Regarding “Claim Approval System in Case Of Employee Not Having PEN in SPARK

In the case of employee those not having PEN Bills are currently prepared as “Non-spark bill”, which is prepared physically and forward with supporting documents to Finance (ITSF) department for getting approval. Now a new option in claim entry has been introduced to INSERT a claim through DDO/Establishment login and FORWARD it for getting approval. The same has been explained in the PDF tutorial.

➤ The preparation of claims are categorizes as follows:

- Claim w.r.t employees having No PEN.*
- Claim w.r.t Legal heirs of employee died in service.*
- Claim w.r.t Legal heirs of employee who died after Retirement.*

➤ Nature of bill included in the claim entry.

- Medical reimbursement/Medical Advance*
- PF closure/Residual balance*
- TA advance Tour*
- Terminal Surrender of Leave*
- Terminal surrender of Leave arrear.*

STEPS FOR PREPARING CLAIM

Step 1) DDO/establishment login Accounts->claim entry>Employee not having PEN (Ref fig:1)

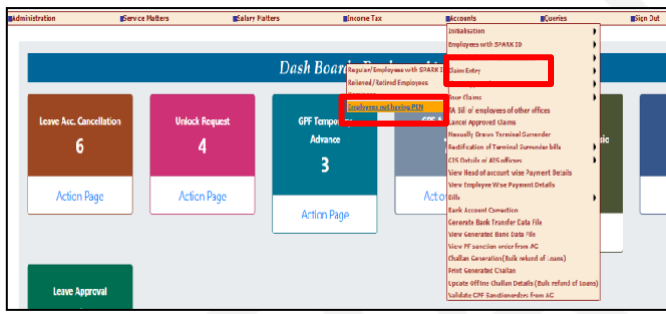


Fig: 1

Step 2) After successfully filling the mandatory fields such as DDO code, Nature of Claim, Claim Type, Period of Bill, Sanctioning authority, Order number, Order Date, Head of account etc, DDO can enter the remaining details related to the employee . Ref (fig: 2)



Fig: 2

Afterwards click on the **INSERT** button. Make sure that the period entered in the Period of Bill column should match with the month and year selected for the bill preparation towards the end of the form.

Step 3) Once **INSERT** button has been clicked- documents related to **Proceedings, Sanction Order, Calculation Sheet** needs to be uploaded. Ref (Fig: 3)

DDOs should ensure that the details entered here match with that of the hard copy prepared from the office.

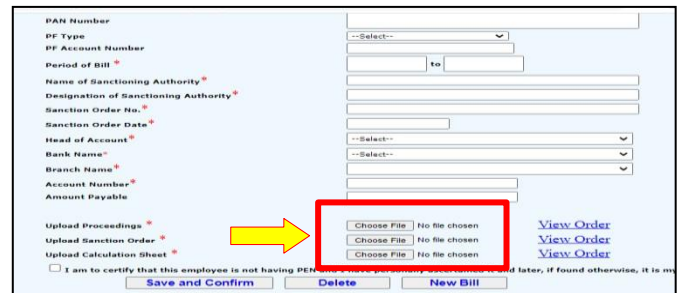


Fig: 3

Using **'SAVE and CONFIRM'** button, draft bill can be generated for initial verification and the same will be forwarded to concern authority's login.

Status of bill can be viewed at the left side of the screen. (Fig: 4)



Fig: 4

- If anything is found incorrect, it is possible to edit or delete the existing entry by the user and generate again.
- Final bill for presenting to Treasury can be generated after 'make Bill from Approved claim' option.

STEPS FOR CLAIM APPROVAL

Accounts->claim entry->claim approval->Employee having No PEN.

The draft bill entered through this option will become final when the DDO approve this bill. Once the claim is approved by the DDO, the same shall be forwarded to ITSF (Finance Department).

Fig: 5

Select the item from the list and DDO could approve the claim with entering the remarks.

Fig: 6

When approving it is necessary to enter the Digital signing (DSC). Signed document will forwarded to Approving authority (Finance Department – ITSF) as mentioned.

If the claim type is to legal heirs, the details of Nominees should be entered in the claim details as shown. (Fig: 7).

Fig:7

Accounts->Bills->make bill from approved claim

After approval from Finance Dept., bill may be prepared using the option Accounts>> Bills>> Make Bill from approved claims.

Accounts->Bills->E-submit Bill

Approved Bill will be listed under the E submission page and the bill copy can be printed from the Accounts-> Bills->View prepared contingent claims option as other claims.

Fig: 8

Objected claims can be cancelled through Accounts->cancel Bill option

*****END*****