

छत्तीसगढ़ शासन
वित्त विभाग
महानदी भवन, मंत्रालय, नया रायपुर

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प्रति,

अपर मुख्य सचिव / प्रमुख सचिव / सचिव
छत्तीसगढ़ शासन
मंत्रालय, नया रायपुर

विषय :- Public Financial Management System का क्रियान्वयन के संबंध में

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भारत सरकार से प्राप्त Public Financial Management System के
अंतर्गत राज्य योजनाओं हेतु मार्गदर्शिका आवश्यक कार्यवाही हेतु संलग्न है।

संलग्न :- यथोपरि


(आनंद मिश्रा)
विशेष कर्तव्यस्थ अधिकारी

Introductory User Guide for State Schemes on PFMS

(Draft Version 1.0)

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Ver.	Date	Summary of Changes
1.0	December 2016	Original Document
1.01	05/01/2017	Addition: user creation Project Manager and Operational Manager

Introduction:

The Central Sector (CS) Schemes and the Central Assistance to State Plan Schemes (CASP) have different implementation models.

As the CS Schemes are implemented solely by the Central Government, the SPMU will assist in ensuring mandatory use of Expenditure, Advance and Transfer (EAT) module of PFMS by the agencies receiving funds under CS schemes and provide assistance in implementing DBT using PFMS for schemes amenable to DBT.

All Plan schemes under which Central Assistance is provided to the States are classified and budgeted together as Central Assistance to State Plans (CASP) with effect from 2014-15 (BE) onwards. The funds under such schemes are placed with the Administrative Ministries for transfer to the States through the Consolidated Fund of the States concerned. The funds released by the Centre are taken as receipt in the State Consolidated fund and based on State legislative approval, CASP funds are budgeted as State Schemes.

The utilisation of the budget of these schemes is either through the State Treasury or is further released to the State Implementing Agencies (SIAs). While the disbursement of funds and their utilisation through State Treasuries will be monitored through PFMS-Treasury Integration Module. Expenditure through SIAs, **where funds of State Schemes are transferred to SIAs from the State Treasuries**, will be monitored by registering them on PFMS and implementing PFMS-EAT module. *[It may be mentioned that prior to restructuring of Centrally Sponsored Schemes and consequent decision of GoI to transfer of funds through the Consolidated Fund of the States, all the first level SIAs and several subsequent level agencies were registered on PFMS against the CSS Schemes. These agencies in various States instead of being registered again will be mapped to the corresponding State Schemes by the SPMU users.]*

Based on the implementation strategy, for CASP schemes, provision for creation of users similar to GoI users such as PFMS Project cell/root level user, Programme Division user and Principal Accounts Office user for each State/UTs, namely State Project Cell User, State Finance Department User, State Scheme Manager and Agency Approver Level 2 have been made. This manual covers creation of SPMU users and their roles for creating state schemes on PFMS, creating scheme wise fund flow hierarchy and components as per scheme guidelines and/or financial reporting requirement and further monitoring through agency registration.

Agencies - Registration, Approval and Management.

As mentioned *ibid*, the CS Schemes are implemented solely by the Central Government, therefore these schemes will continue to be managed by CPMU. The agencies registered under these schemes will be mapped to the Programme Divisions in the Ministries/Departments of Government of India.

However for the CASP, there could be multiple schemes and more than one Department implementing these schemes in a State for releases under a single CASP scheme. Thus the implementation of PFMS for CASP, in a nutshell, will be ; the SPMU users will create and configure the State schemes in PFMS for the corresponding CASP schemes. The schemes so created will be mapped to various State Scheme Managers (SSM) of the implementing Departments in the States and the Agencies of CASP in the State will be registered under these Schemes.

Registration of First Level Agencies (CASP): The agency registration process is explained in detailed in the 'Registration Manual'. However, before registering an agency in PFMS the following points may please be kept in mind:

- (1) An agency will be registered only once on the PFMS portal.
- (2) Further schemes can be added once an agency is registered and approved for a scheme. This is done after login by the agency.
- (3) Multiple bank accounts can be added for a scheme, if required.
- (4) It is recommended that agency has different bank accounts for each scheme, however PFMS also supports one bank account for multiple schemes for an agency.
- (5) The first level agencies, if not already registered on PFMS, will be registered by the SSM (menu : 'Agencies' → 'create new').
- (6) The first level agencies, if already registered and approved on PFMS, will be mapped by the Scheme Manager for the respective State Scheme.
- (7) The second level agencies will be registered by the first level agencies. The third level agencies will be registered by the second level agencies and so on. Eg The State level agencies will **login** and register District level agencies and the District level agencies will **login** and register block level agencies and so on.
- (8) The second level agencies already registered will add the new State scheme and select the first level agency as funding agency. Similar process is to be followed for the subsequent level agencies.

SPMU user creation process - sequentially:

1. The user creation process starts with the creation of SPMU Controller user for each State/UT by the CPMU root user. The userid and password will be communicated by CPMU.
2. SPMU Controller logs in and creates and approves two users viz State Project Cell user and State Finance Department user.
3. State Project Cell user will create State Schemes corresponding to CASP Schemes available in PFMS. For naming the State schemes a list of state schemes mapped against CASP could be downloaded from 'OT-13' report. Creation and configuration of State schemes will be done by State Project Cell user in consultation with concerned Departments in the State.
4. Once the schemes are created, the State Finance Department user will create State Scheme Managers in the State Department and map scheme (s) implemented by his Department.
5. The State Finance Department user will also create 'Agency Approver Level 2' similar to two level agency approval in the centre.

The SPMU usertypes, its creation, approval and roles of the users at a glance is given below:

SPMU User Types: Roles in brief

Sr. No	User type	Designation	To be created and approved by	Role on PFMS SPMU modules
1	SPMU Controller	Joint Controller General of Accounts	Root User CPMU	Creation, Approval & Management of state Project Cell User and State Finance Department user
2	State Project Cell User	Account Officers / Assistant Account Officers (AOs & AAOs O/o CGA)	SPMU Controller	(1) Creation and configuration of State Schemes (2) Management of agencies beyond the role assigned to State Scheme Manager (in exceptional fields)
3	State Finance Department	Secretary Finance Department (or Equivalent)	SPMU Controller	Creation, Approval & Management of three users viz. (1) 'Scheme Manager for State' (2) 'Agency approver Level 2'. (3) State Departmental MIS User
4	State Scheme Managers	Concerned State Departmental Officer (Secretary / Under Secretary) – Scheme wise.	State Finance Department	Creating, Approving and Managing (editing, mapping) first level agencies registered in his State
5.	Agency Approver – Level 2	Director / Dy Director / Treasury Officer	State Finance Department	Second level approver of First level agency
6.	State Departmental MIS User	Departmental Heads	State Finance Department	For viewing Reports.
7.	Project Manager (outsourced by PFMS)	Project Managers	State Project Cell User	1. Marking attendance. 2. Entering day-to-day work done. 3. Viewing rights for 3.1. Reports -M03, M16, DBT Reports for State Schemes. 3.2 –Details of agencies registered in the State. 3.3 User details (users of agencies such as maker, checker, agency admn) 3.4 Attendance and work done

				reports of Operational Managers of the concerned State. 3.5 Details of Operational Managers.
8	Operational Manager (outsourced by PFMS)	Operational Managers	State Project Cell User	1. Marking attendance. 2. Entering day-to-day work done. 3. Viewing rights for 3.1. Reports -M03, M16, DBT Reports for State Schemes. 3.2 -Details of agencies registered in the State. 3.3 User details (users of agencies such as maker, checker, agency admn)

Section 1.1

Creation of SPMU Users

The **State Project Management Unit Controller (SPMUC)** is the top level user for a State. The SPMUC user is created by the root user at the CPMU. There will be only one SPMUC user for a State. His role is limited to creating two users viz 'State Project Cell User' and 'State Finance Department user'. The SPMUC will login using his credentials as shown in *Figure 1.1*. The URL is <https://pfms.nic.in>

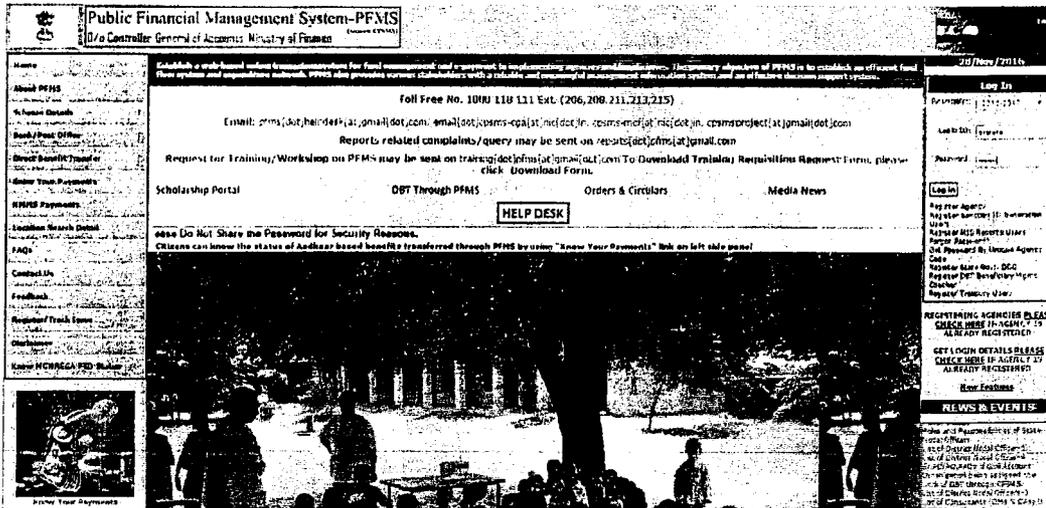


Figure 1.1

Creation of State Project Cell User (SPCU): The State Project Cell User is created by SPMUC. The responsibilities assigned to SPCU are (1) Creation and configuration of State Schemes (Creation of hierarchy, components etc.) (2) Edit Name and other particulars which are beyond the purview of State Scheme Manager(s) of the agency(s) registered in the State. (3) Merging of agencies in his state (4) Viewing activities report of PM and OMs deployed in the State.

The procedure for creating this user is as follows:

1. Login as SPMUC user.
2. Select 'all type of user registration' from the 'user' menu.
3. Select the user 'State Project Cell' from the drop down list under 'type of user' as shown in Figure 1.2

Public Financial Management System-PFMS
 Welcome: SPPMUC Odisha
 User Type: StateSPPMUC Controller
 Financial Year: 2016-2017

Instructions
 Email is mandatory for user communication, regarding your User ID, Password, Notifications, Alerts etc.

User Registration For all Type

Name: [Field]
 Type of User: [Dropdown: State Project Cell User]
 First Name: [Field]
 Last Name: [Field]
 Official Email ID: [Field]
 Phone No: [Field]
 Mobile No: [Field]

[Submit]

Figure 1.2

4. Fill in all the details given in the form (Figure 1.3) and press submit button and wait for the successful registration message.

Instructions
 Email is mandatory for user communication, regarding your User ID, Password, Notifications, Alerts etc.

User Registration For all Type

Name: [Field]
 Type of User: [Dropdown: State Project Cell User]
 First Name: [Field]
 Last Name: [Field]
 Official Email ID: [Field]
 Phone No: [Field]
 Mobile No: [Field]
 State Assignment: [Field]
 Designation: [Field]
 Aadhaar Number: [Field]
 Date of joining to PFMS: [Field]
 Date of Superannuation/End Date: [Field]
 Date Of Birth: [Field]
 Hint Question: [Field]
 Answer: [Field]
 Confirm Answer: [Field]
 Word Verification: [Field]
 [Submit] [Cancel]

Figure 1.3

5. Approval of State Project Cell user created: Select 'Manage' from the 'user' menu. Enter at least 4 character of the username of the newly created user and press 'Search' button (Figure 1.4). Note: The First name and Last name search criteria could also be used to search the user.

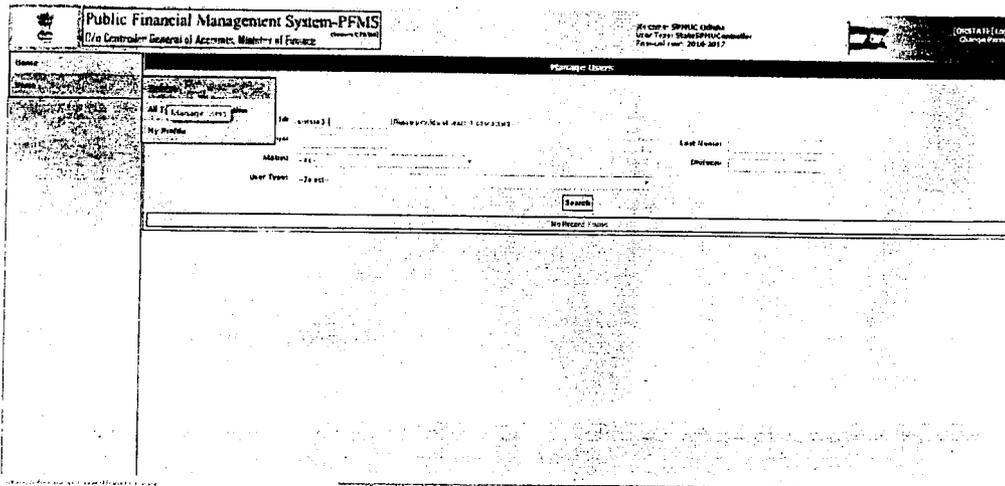


Figure 1.4

6. Click the hyperlink 'Login Name' (red in colour) to review the details entered (Figure 1.5)

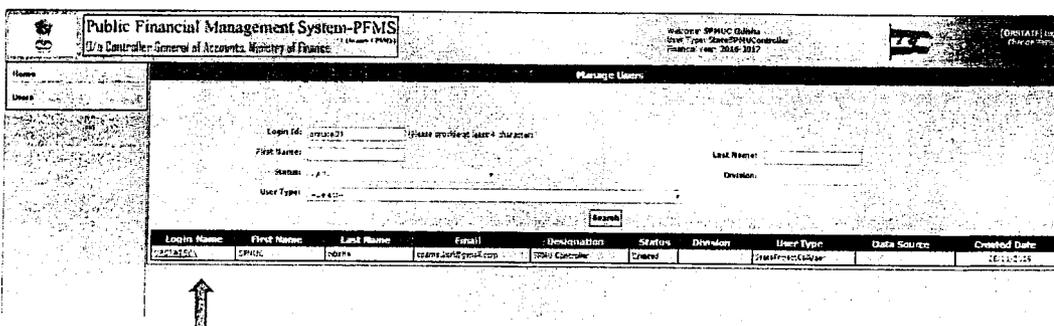


Figure 1.5

7. Review the details and again click the hyperlink 'Login Name' (blue in colour Figure 1.6)

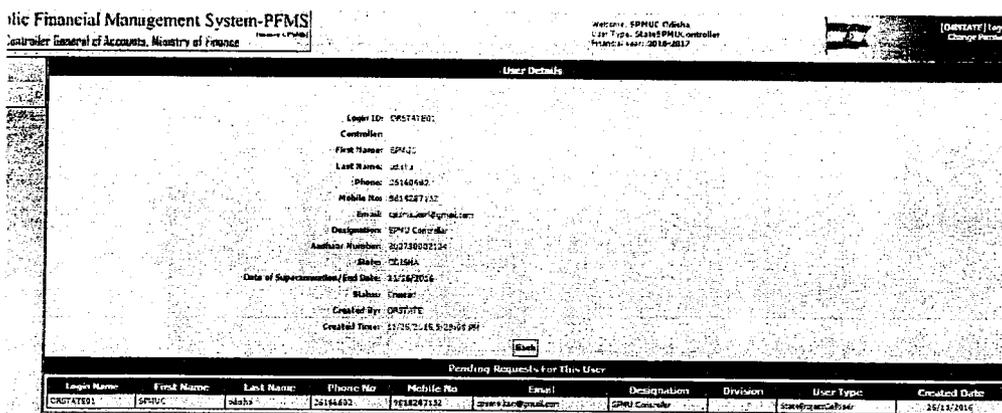


Figure 1.6

8. Review the details and press 'Approve' to approve the user (Figure 1.7)

Approve/ Reject User

Edited By: SPMUC Odisha (Phone : 26160682)
 Login Id: ORSTATE01
 Controller:
 First Name: SPMUC
 Last Name: odisha
 Phone: 26160682
 Email: cpsms.ksri@gmail.com
 Designation: SPMU Controller
 Status: Created
 Created By: DRSTATE
 Created Time: 11/26/2016 5:29:06 PM
 Remarks:

Figure 1.7

9. Click 'OK' in the confirmation dialogue box (Figure 1.8) and wait for system to generate success message (Figure 1.9). Note: 1. after approval only the user will be able to login into PFMS. 2. The appearance of confirmation dialogue box differs according to computer operating system.

Financial Manager
General of Accounts Man

pfms.nic.in says:
Are you sure , you want to approve

Controller:
 First Name: SPMUC
 Last Name: odisha
 Phone: 26160682
 Email: cpsms.ksri@gmail.com
 Designation: SPMU Controller
 Status: Created
 Created By: DRSTATE
 Created Time: 11/26/2016 5:29:06 PM
 Remarks:

Figure 1.8

User Details

Request approved successfully.

Login ID: ORSTATE01
 Controller:
 First Name: SPMUC
 Last Name: odisha
 Phone: 26160482
 Mobile No: 9816237152
 Email: opema.kari@gmail.com
 Designation: SPMU Controller
 Aadhaar Number: 302730002104
 State: ODISHA
 Date of Superannuation/End Date: 11/30/2016
 Status: Approved
 Created By: ORSTATE
 Created Time: 11/29/2016 9:29:00 PM
 Modified By: OPSTATE
 Last Modified: 11/17/2016 10:00:23 AM

Figure 1.9

10. Once the user is approved, the userid and password will be communicated to the registered emailid. Note: The system will require the user to change the password on the first login (Figure 1.10).

Change Password

User Name: ORSTATE01

Current Password:

New Password:

(Password must contain minimum 6 characters and maximum 15 characters. Password should contain alphanumeric and atleast one special character like [!@#\$%^&*])

Confirm Password:

Figure 1.10

Creation of State Finance Department User : The user is created by SPMUC user. Presently the State Finance Department user has been assigned the role of creating, editing and approving two users viz (1) 'Scheme Manager for State' and (2) 'Agency approver Level 2'. The procedure for creating this user is similar to creation of State Project Cell User (Figure 1.11)

Instructions

User Registration for All Type

Type of User: State Finance Department User

First Name:

Last Name:

Official Email ID:

Phone No:

(Phone Number Starting with Country Code, STD Code)

Mobile No:

(Mobile Number Starting with Country Code)

State Assigned:

Designation:

Aadhaar Number:

Date of Joining to PFMS:

Date of Superannuation/End Date:

Date of Birth:

Has Question?

Answer:

Confirm Answer:

Word Verification:

Enter the letters as they are shown in the image above. (Letters are not case-sensitive).

For any problem in registration, Please Contact Us.

Figure 1.11

Creation of State Scheme Manager: The user is created by 'State Finance Department' User. Presently the 'State Scheme Manager' has been assigned the role of creating, approving and managing **first level** agencies registered in his State. The agencies registered for the Schemes assigned to this user will only be visible to him for approval. The Form available to State Finance Department for creating the user is given in *Figure 1.12*.

Figure 1.12

Assigning of State Schemes to State Scheme Manager: The Finance Department User, while registering the State Scheme Manager assigns the Schemes selecting the hyperlink 'Select Scheme' available in the form (*Figure 1.13*). Option to select multiple schemes and remove the wrongly selected schemes are also available to the Finance Department User (*Figure 1.14*).

Figure 1.13

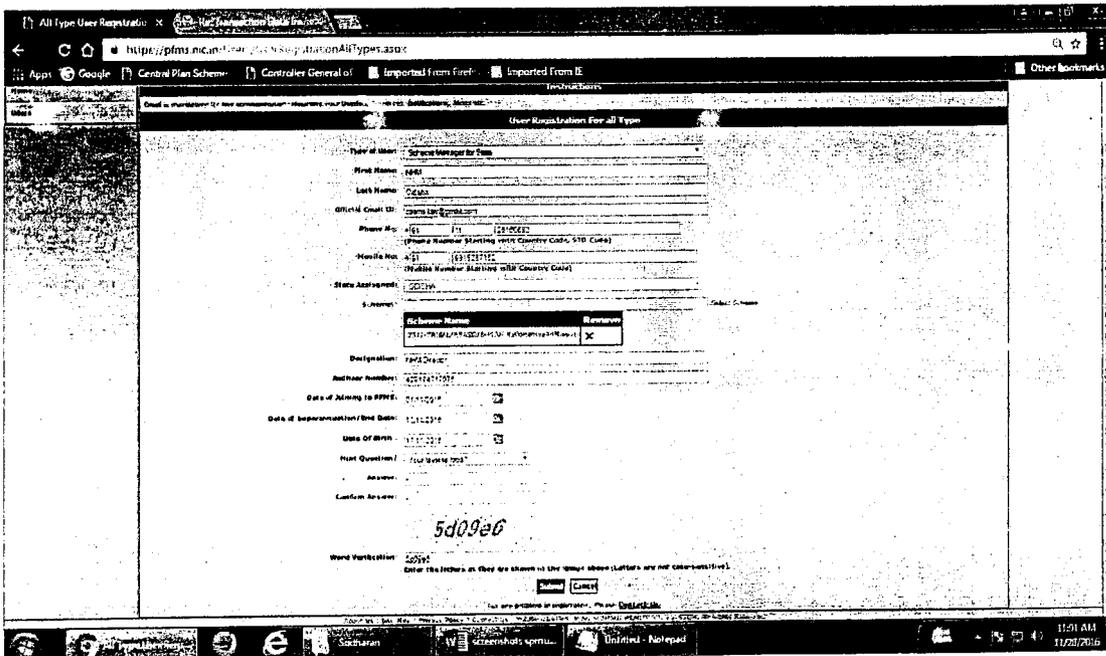


Figure 1.14

The registration and approval process is otherwise similar to creation of State Project Cell User.

Creation of Agency Approver Level 2 : The user is created by 'State Finance Department' user. The user will be preferably from Treasury Department. He will be the second level approver of agencies registered in his State for the State Schemes. The registration and approval process is similar to creation of State Project Cell User. The form available to State Finance Department user is given below.

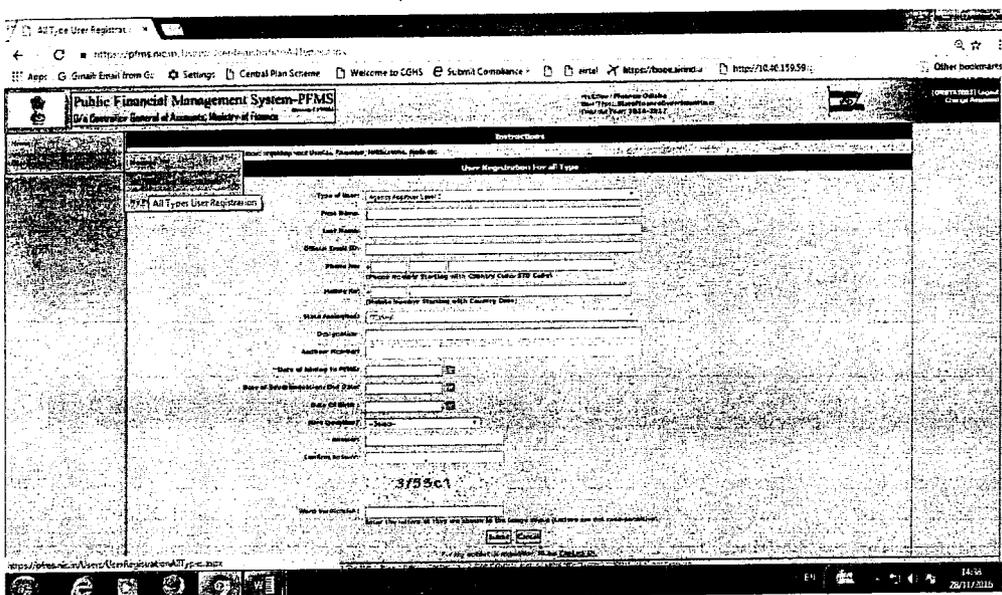
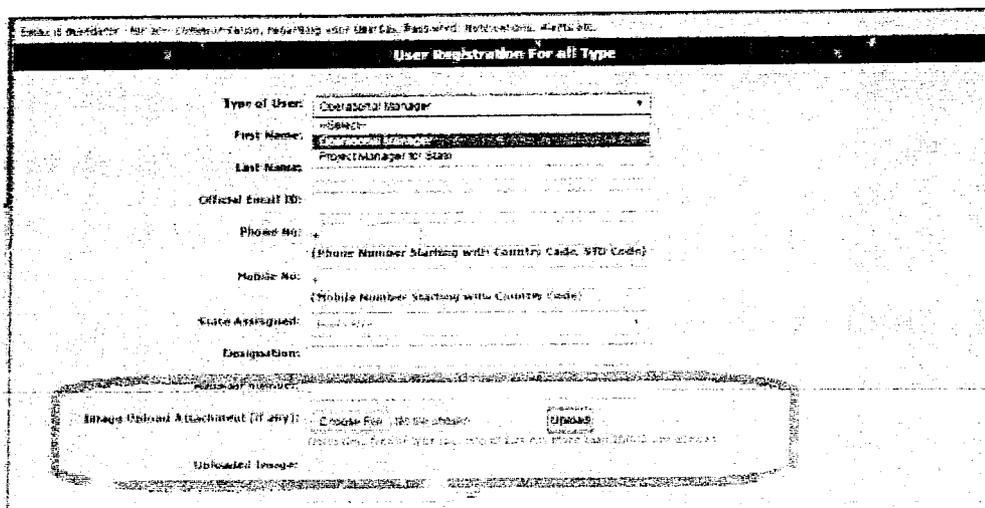


Figure 1.15

Creation and approval of Project Managers users (PrM) (Outsourced by PFMS): The PrM User is created by SPCU. The user presently has the following roles and corresponding access on PFMS portal:

1. Marking attendance.
2. Entering day-to-day work done.
3. Viewing rights for
 - 3.1. Reports -M03, M16, DBT Reports for State Schemes.
 - 3.2 -Details of agencies registered in the State.
 - 3.3 User details (users of agencies such as maker, checker, agency admin)
 - 3.4 Attendance and work done reports of Operational Managers of the concerned State.
 - 3.5 Details of Operational Managers.

The registration and approval process is similar to creation of State Project Cell User. However, in addition the PrM will be required to upload his latest photo from the link available in the form (as highlighted in the figure 1.16 below). The form available for creation of PrM is given below:



The screenshot shows a web form titled "User Registration: For all Type". The form contains the following fields and options:

- Type of User: Operational Manager (dropdown menu)
- First Name: Operational Manager (text input)
- Last Name: Project Manager (text input)
- Official Email ID: (text input)
- Phone No.: (text input, with note: Phone Number Starting with Country Code, STD Code)
- Mobile No.: (text input, with note: Mobile Number Starting with Country Code)
- State Assigned: (dropdown menu)
- Designation: (text input)
- Image Upload Attachment (if any): (text input) with a "Choose File" button and an "Upload" button.
- Uploaded Image: (text input)

Figure 1.16

Creation and approval of Operational Managers users (OPrM) (Outsourced by PFMS): The OPrM User is also created by SPCU. The user presently has the following roles and corresponding access on PFMS portal:

1. Marking attendance.
2. Entering day-to-day work done.
3. Viewing rights for
 - 3.1. Reports -M03, M16, DBT Reports for State Schemes.
 - 3.2 -Details of agencies registered in the State.
 - 3.3 User details (users of agencies such as maker, checker, agency admin)

The registration and approval process is same as creation of PrM. Refer to figure 1.16 above.

SECTION - 2
STATE SCHEME CONFIGURATION

2.1 CREATING NEW SCHEME

The process of Scheme configuration is entirely done by the 'State Project Cell User'. The processes involved in creating a scheme is explained below:

1. Select 'Create New Scheme' from 'Masters' → 'Schemes' (Figure 2.1.1)

The screenshot shows the 'Add New Scheme' form in the PFMS. The form is titled 'Add New Scheme' and is located under the 'Masters' → 'Schemes' menu. The form includes the following fields:

- Scheme Name:** TRIBAL AREAS SUB PLAN (MANDATORY)
- Description:** Tribal Sub-Plan (M)
- Start Year:** 2015
- End Year:** 2015
- Scheme Type:** Plan (Mandatory)
- State:** Jharkhand
- Scheme Group:** Mandated Public Works
- Scheme Sector:** Tribal Areas Sub-Plan
- Scheme Fund Flow Route:** Hybrid
- State Wise Allocation Required:** Yes

Buttons for 'Submit' and 'Cancel' are visible at the bottom of the form.

Figure 2.1.1

2. Select appropriate category of Scheme as Plan or Non-Plan (Mandatory).
3. Input Scheme Name (The list of State Schemes corresponding to GoI CASP Schemes can be downloaded from State Treasury Administrator login(Mandatory).
4. Enter brief description of the Scheme (Mandatory) .
5. Scheme Fund Flow Route may be selected as 'Puretreasuryroute' if funds received by the State is disbursed through treasury only and 'PureSPVroute' if funds is released to first level in the State's Bank Account select 'nbrid' if both the above types of flow is adopted for the Scheme (optional field).

The screenshot shows the 'Add New Scheme' form in the PFMS. The form is titled 'Add New Scheme' and is located under the 'Masters' → 'Schemes' menu. The form includes the following fields:

- Scheme Category:** Plan (Mandatory)
- Scheme Name:** TRIBAL AREAS SUB PLAN (MANDATORY)
- Description:** Tribal Sub-Plan (M)
- Start Year:** 2015
- End Year:** 2015
- Scheme Type:** Plan (Mandatory)
- State:** Jharkhand
- Scheme Group:** Mandated Public Works
- Scheme Sector:** Tribal Areas Sub-Plan
- Scheme Fund Flow Route:** Hybrid
- State Wise Allocation Required:** Yes

Buttons for 'Submit' and 'Cancel' are visible at the bottom of the form.

Figure 2.1.2

6. On successful creation of the Scheme following message is displayed.

The screenshot shows the PFMS interface after a successful scheme creation. The message 'Scheme created successfully.' is displayed in a green box. A 'Back' button is visible below the message. The navigation menu on the left includes 'Home', 'Masters', 'Scheme', 'Agency', 'My Schemes', and 'Accounts'.

Figure 2.1.3

2.2 ASSIGNING HIERARCHY NAME AND CREATING HIERARCHY.

Before creating hierarchy for a Scheme, a hierarchy name needs to be assigned. The processes involved is explained below:

1. Select 'Manage Scheme' from 'Masters' → 'Schemes'.
2. Search the Scheme (to which hierarchy name has to be assigned) by giving few letters of the Scheme name or Scheme code in the Scheme Code/ Name box and press search button. (Figure 2.2.4).
3. Select/Click the required Scheme (Figure 2.2.5)

Code	Name	SchemeGroupName	SchemeTypeName	Status	CreatedDate	ModifiedDate
1247	State Govt. Health (PFMS) - Odisha	State Govt. Scheme	State Govt. Scheme	Active	18/12/2016	
1247	TSP/AP/PESSUB-PLAN Health/Health Mission	Medicine and Health	State Govt. Scheme	Active	23/11/2016	

Figure 2.2.4

Code	Name	SchemeGroupName	SchemeTypeName	Status	CreatedDate	ModifiedDate
1247	State Govt. Health (PFMS) - Odisha	State Govt. Scheme	State Govt. Scheme	Active	18/12/2016	
1247	TSP/AP/PESSUB-PLAN Health/Health Mission	Medicine and Public Health	State Govt. Scheme	Active	28/11/2016	

Figure 2.2.5

- The Scheme details will be displayed as in Figure 2.2.6. Click the 'Hierarchy' button to input the Scheme Hierarchy Name (Figure 2.2.7).

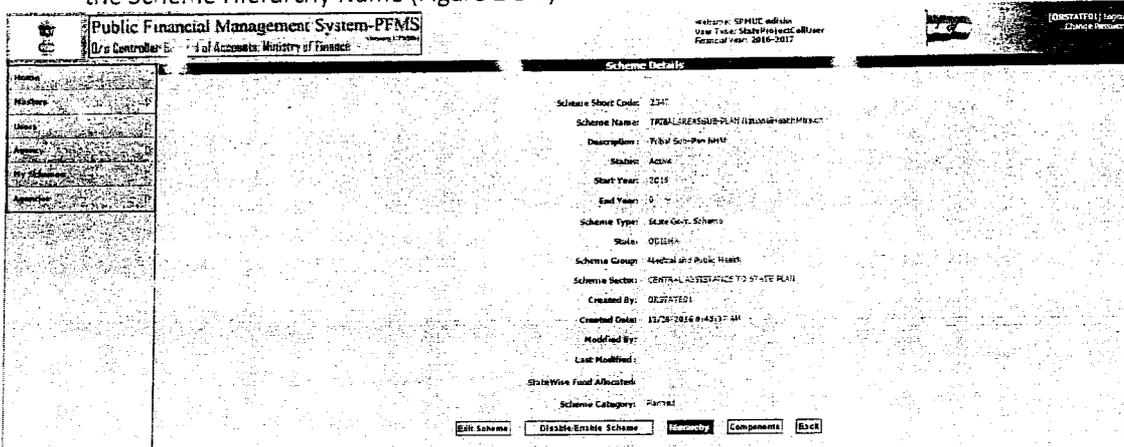


Figure 2.2.6

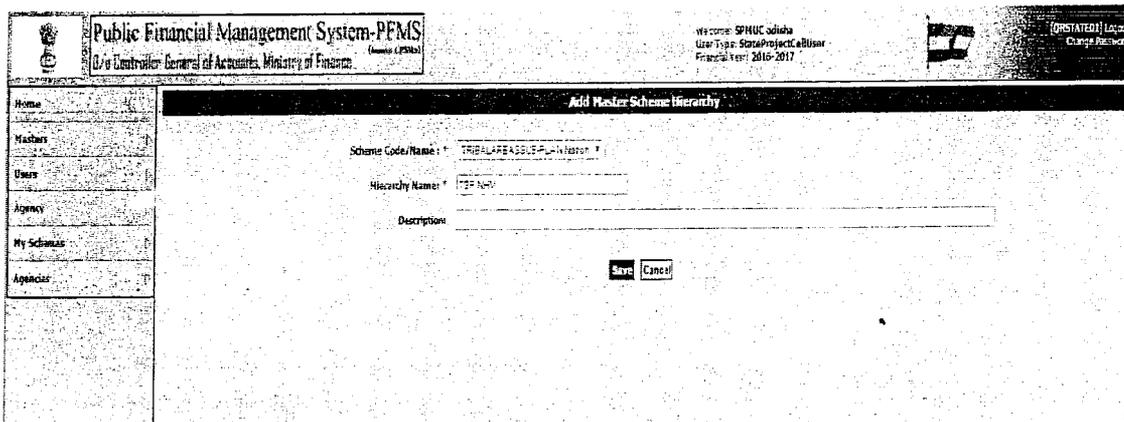


Figure 2.2.7

- On successful insertion of Hierarchy name the following message will be displayed (Fig.2.2.8)

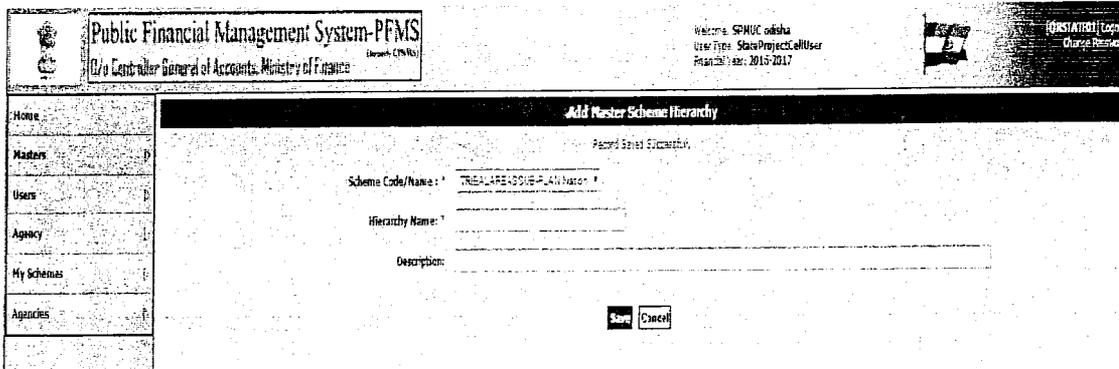


Figure 2.2.8

CREATING HIERARCHY

- Search the Scheme for which hierarchy is to be created. Select 'Manage Scheme Hierarchy' from 'My Schemes' → 'Scheme Hierarchy' (Figure 2.2.9) The hierarchy name assigned will be displayed along with the Scheme Name. Select appropriate Scheme.

Figure 2.2.9

- Click 'Add Scheme Hierarchy Level' (figure 2.2.10)

Figure 2.2.10

- Select the Master Level Type one by one as per hierarchy of fund flow State, District, block, Panchayat as the case may be. Eg. Select State from Master Level Type and assign Level name 'State health Society' and press save button. Then Select District and assign 'District Health Society' as level name and press save button. This process is to be continued till the last level. (Figure 2.2.11, 2.2.12)

Figure 2.2.11

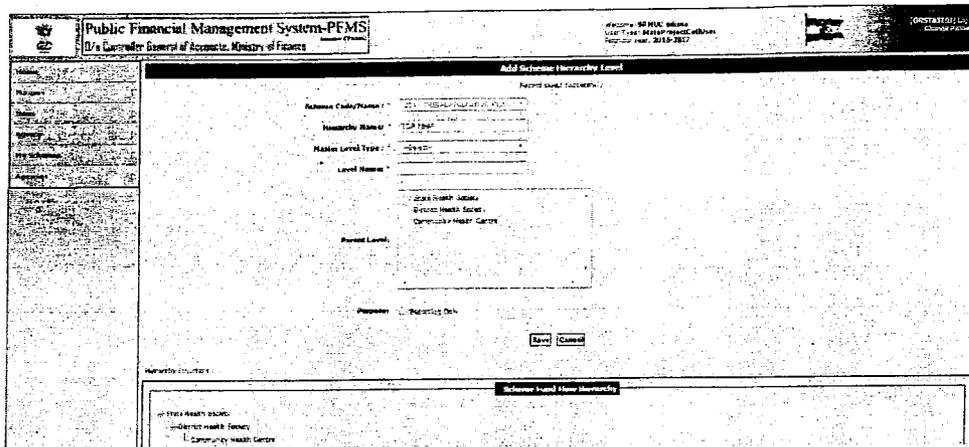


Figure 2.2.12

9. Occasions may arise when there will be some agencies in between the standard hierarchy structure (eg. Division between a State and a District, Clusters between Districts and Blocks). This too could be configured State-wise. However, in the case of SPMU the default State will be selected. The process is given below:
 - 9.1 Select 'Manage Scheme Hierarchy' from 'My Schemes' → 'Scheme Hierarchy'.
 - 9.2 Select scheme from Scheme Code/Name dropdown box (Figure 2.2.13).
 - 9.3 Click 'Customise State Wise' button (Figure 2.2.14)
 - 9.4 Select Level type as 'between' (Figure 2.2.15)
 - 9.5 Input Level Name (here we have given 'Division') (Figure 2.2.16)
 - 9.6 Select From Level ('Division' is placed between from level 'State' and 'District'), to level will be the next level and will be selected automatically. (Figure 2.2.17)

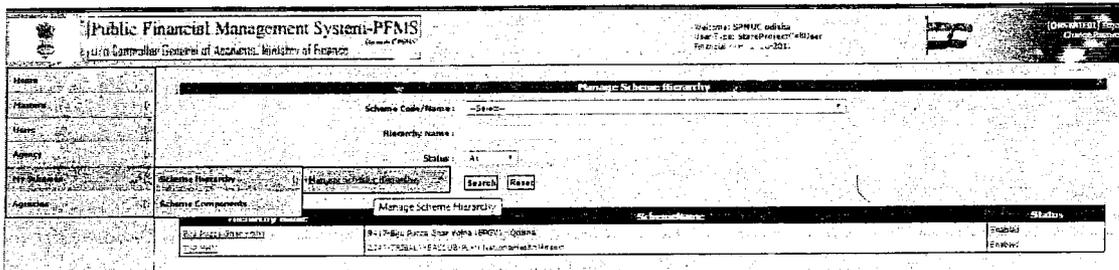


Figure 2.2.13

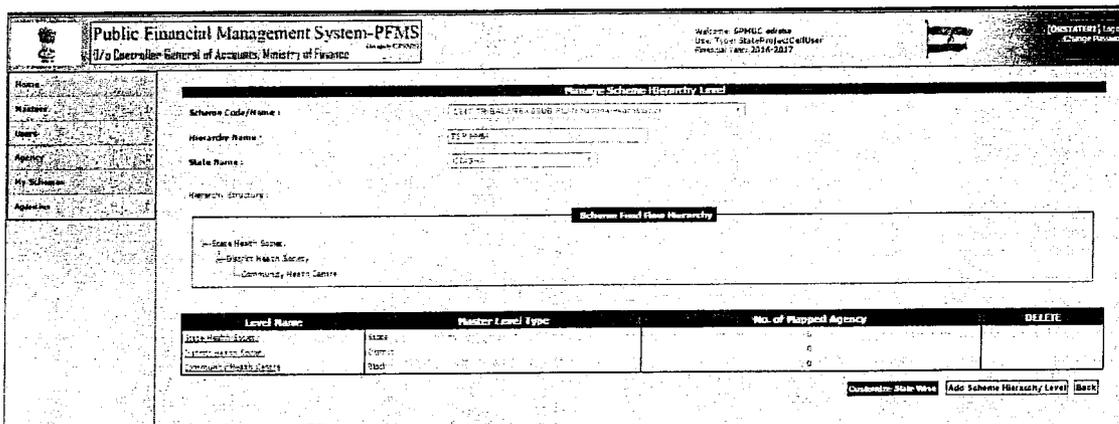


Figure 2.2.14

Public Financial Management System-PFMS
 D/o Controller General of Accounts, Ministry of Finance

Version: SPNHC 4.0.0.0
 User Type: SuperAdminUser
 Financial Year: 2016-2017

(ORSTATES) Logout
 Change Password

Home
 Masters
 Users
 Agency
 My Schemes
 Agencies

State Wise Scheme Hierarchy Customization

Scheme Code/Name : [TEXT FIELD]
 Hierarchy Name : [TEXT FIELD]
 State Name : [DROP DOWN]
 Master Level Type : [DROP DOWN]
 Level Name : [TEXT FIELD]
 Purpose : [DROP DOWN]

[Save] [Cancel]

Hierarchy Structure

Scheme Fund Flow Hierarchy

- State Health Society
 - District Health Society
 - Community Health Centre

Figure 2.2.15

Public Financial Management System-PFMS
 D/o Controller General of Accounts, Ministry of Finance

Version: SPNHC 4.0.0.0
 User Type: SuperAdminUser
 Financial Year: 2016-2017

(ORSTATES) Logout
 Change Password

Home
 Masters
 Users
 Agency
 My Schemes
 Agencies

State Wise Scheme Hierarchy Customization

Scheme Code/Name : [TEXT FIELD]
 Hierarchy Name : [TEXT FIELD]
 State Name : [DROP DOWN]
 Master Level Type : [DROP DOWN] is Master
 Level Name : [TEXT FIELD]
 From Level : [DROP DOWN] State Health Society
 To Level : [DROP DOWN] District Health Society
 Purpose : [DROP DOWN] Reporting Unit

[Save] [Cancel]

Hierarchy Structure

Scheme Fund Flow Hierarchy

- State Health Society
 - District Health Society
 - Community Health Centre

Figure 2.2.16

Public Financial Management System-PFMS
 D/o Controller General of Accounts, Ministry of Finance

Version: SPNHC 4.0.0.0
 User Type: SuperAdminUser
 Financial Year: 2016-2017

(ORSTATES) Logout
 Change Password

Home
 Masters
 Users
 Agency
 My Schemes
 Agencies

State Wise Scheme Hierarchy Customization

Parent Level selected

Scheme Code/Name : [TEXT FIELD]
 Hierarchy Name : [TEXT FIELD]
 State Name : [DROP DOWN]
 Master Level Type : [DROP DOWN] is Master
 Level Name : [TEXT FIELD]
 Purpose : [DROP DOWN] Reporting Unit

[Save] [Cancel]

Hierarchy Structure

Scheme Fund Flow Hierarchy

- State Health Society
 - Director
 - District Health Society
 - Community Health Centre

Figure 2.2.17

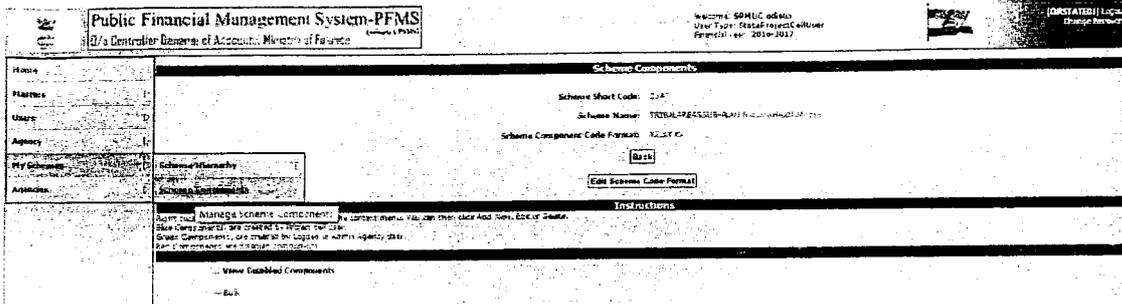


Figure 2.3.6

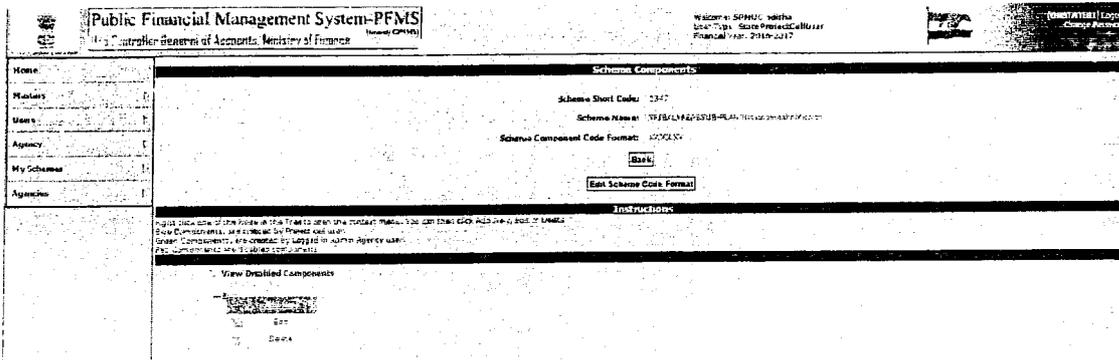


Figure 2.3.7

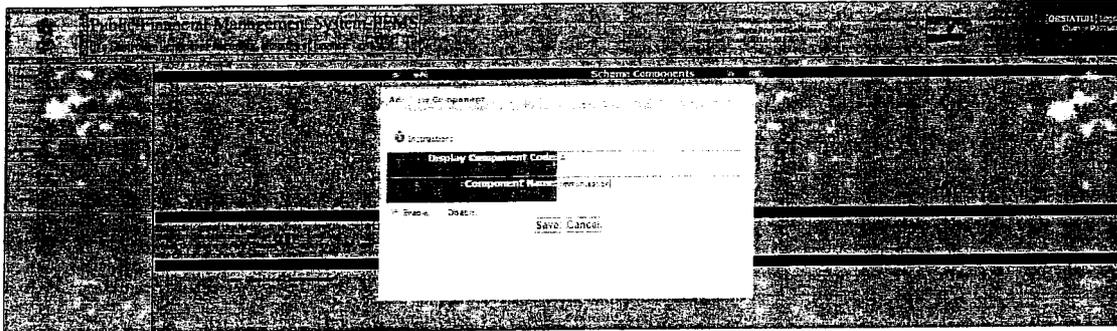


Figure 2.3.8

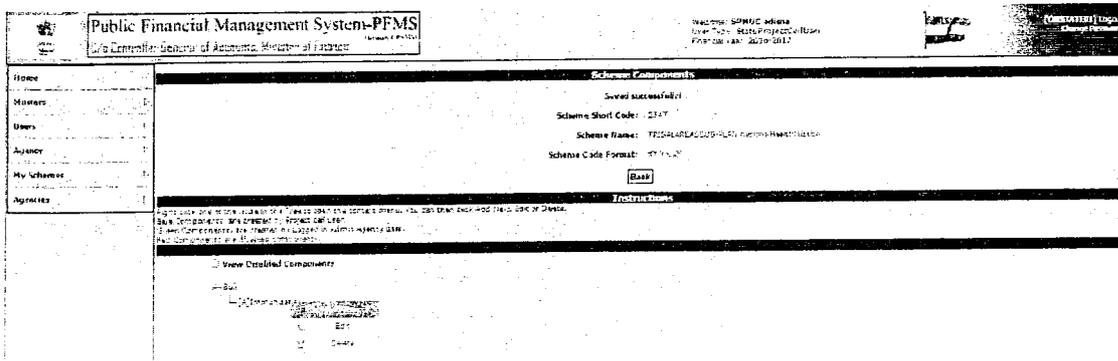


Figure 2.3.9

Public Financial Management System - PFMS
 U/a Controller General of Accounts, Ministry of Finance

Version: SP/10/01/01
 User Type: Maintenance Officer
 Financial Year: 2010-2011

(PRINTED) Logout
 Change Password

System Components

Saved successfully!

Scheme Sheet Code: 2347

Scheme Name: TRIBAL MASSRU-PLAN (Housing) Maharashtra

Scheme Code: 100000

Instructions

Right click on the icon to view details of the scheme. The icon shows the details of the scheme.
 The components are created by Project user.
 Scheme components are created by Project user.
 All components are in the scheme.

View Disabled Components

1. [Scheme Name]

2. [Scheme Code]

Figure 2.3.10

2.4 SETTING AGENCY TYPE

2.4.1 Agency Type is set for defining the type of Agency (Autonomous Bodies, Govt. Institutions, Local Bodies etc) at each level. This is to predefine the agency type at the time of agency registration at each level of the hierarchy. The process is as under:

- Select 'Agency Type' from 'Masters' (Figure 2.3.11)
- Select the required scheme by clicking the hyperlink 'Select Scheme' adjacent to Scheme name box.
- Click search giving scheme code or few letters of the schemename and select the required scheme from the pop up dialogue box.
- Input the 'Institution Type' in the 'Institutiontype' box. This is the level name of the scheme hierarchy. In this case 'State Health Society'(Figure 2.3.12).
- Select appropriate type of agency from the 'Agency/Institutiontype' drop down list (Figure 2.3.12). wait for the saved successfully message (Figure 2.3.13 and 2.3.13(a))
- Repeat process d) and e) above for each level.

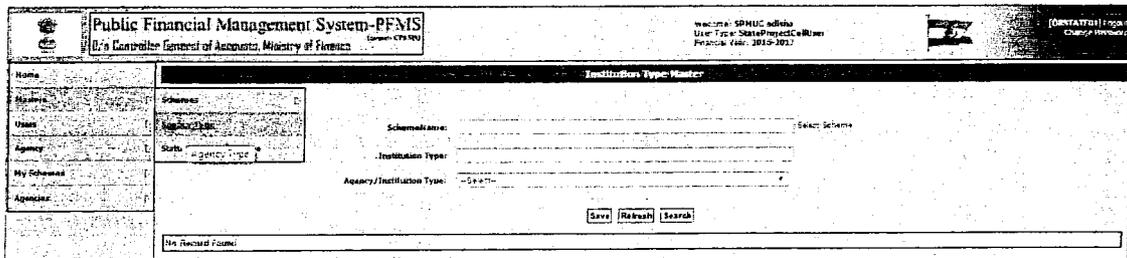


Figure 2.3.11

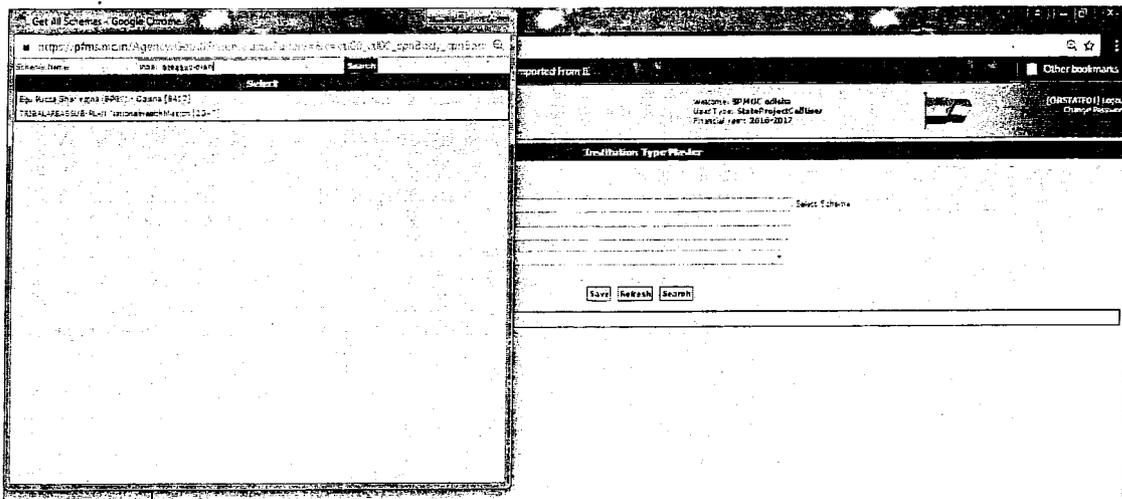


Figure 2.3.12

Public Financial Management System-PFMS
 Controller General of Accounts, Ministry of Finance

WELCOME SPHIX, welcome
 User Type: StateProjectUser
 Project No: 2016-2017

(DISTANCE) Logout
 Change Password

Institution Type Master

Record inserted

Scheme Name: TRIBALAREASUBPLANS... (2017) Select Scheme

Institution Type: State Health Society

Agency/Institution Type: --Select--

No Record Found

Institution Type Name	Scheme Name	Enable/Disable
TRIBALAREASUBPLANS... (2017)	TRIBALAREASUBPLANS... (2017)	Disable

Figure 2.3.12

Public Financial Management System-PFMS
 Controller General of Accounts, Ministry of Finance

WELCOME SPHIX, welcome
 User Type: StateProjectUser
 Project No: 2016-2017

(DISTANCE) Logout
 Change Password

Institution Type Master

Record inserted

Scheme Name: TRIBALAREASUBPLANS... (2017) Select Scheme

Institution Type: State Health Society

Agency/Institution Type: Registered Societies (Govt, Autonomous Bodies)

Institution Type Name	Scheme Name	Enable/Disable
TRIBALAREASUBPLANS... (2017)	TRIBALAREASUBPLANS... (2017)	Disable

Figure 2.3.13

Public Financial Management System-PFMS
 Controller General of Accounts, Ministry of Finance

WELCOME SPHIX, welcome
 User Type: StateProjectUser
 Project No: 2016-2017

(DISTANCE) Logout
 Change Password

Institution Type Master

Record inserted

Scheme Name: TRIBALAREASUBPLANS... (2017) Select Scheme

Institution Type: --Select--

Agency/Institution Type: --Select--

Institution Type Name	Scheme Name	Enable/Disable
TRIBALAREASUBPLANS... (2017)	TRIBALAREASUBPLANS... (2017)	Disable
TRIBALAREASUBPLANS... (2017)	TRIBALAREASUBPLANS... (2017)	Disable
TRIBALAREASUBPLANS... (2017)	TRIBALAREASUBPLANS... (2017)	Disable

Figure 2.3.13(a)

Appendix:

Login ID	System Generated
Official Email Address	Email Address should be your personal official email ID where the passwords can be recovered. All system generated communications will be sent to this email address only.
Mobile Number	Mobile number should be your personal mobile number where the passwords can be retrieved.
State Assigned	Select the state from drop down menu
Scheme	State Scheme
Date of Joining PFMS	Date of Joining PFMS
Date of Superannuation/ End Date	Date of retirement or date of ending the tenure (whichever is earlier)
Password rule	Minimum six digits and should contain minimum one alphabet, one number and one special character. It is mandatory to change password on first login after approval of user / Agency by Authorised Officer/ Official.