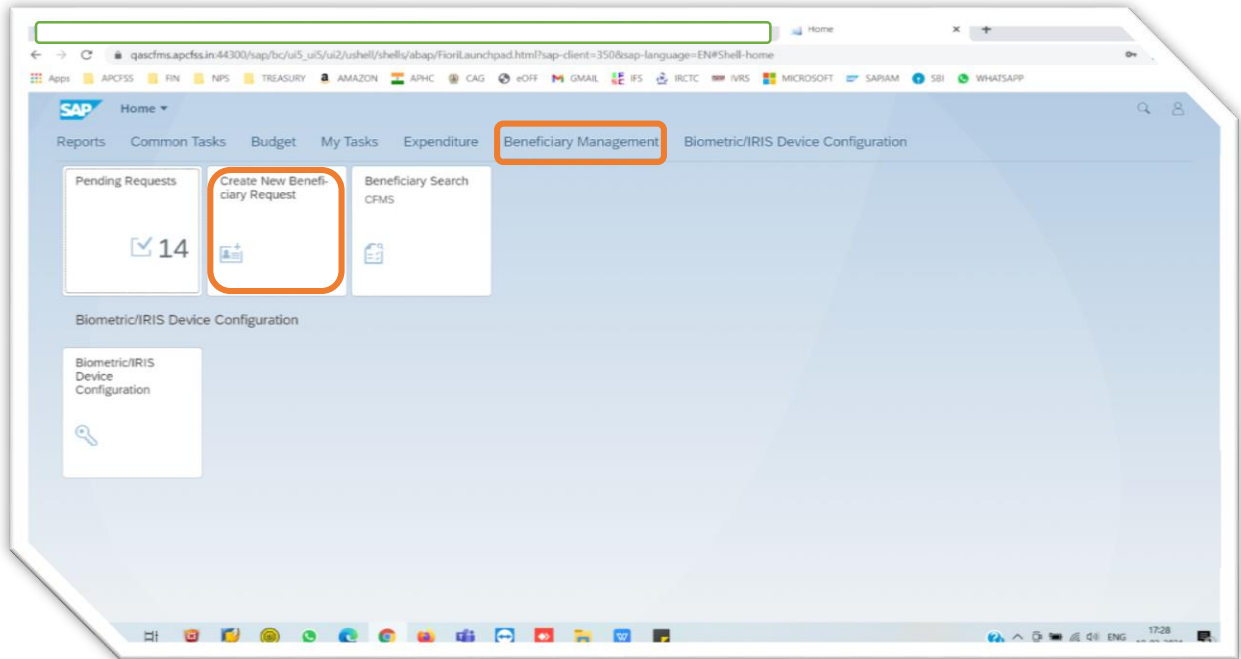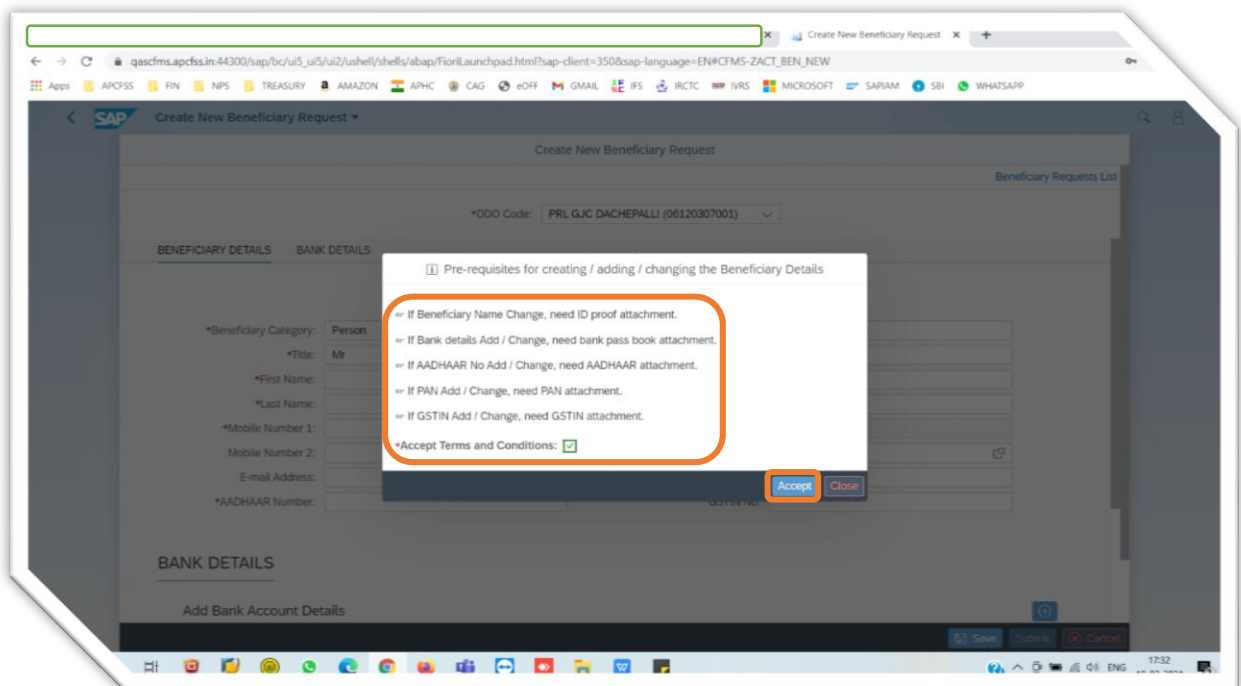# USER MANUAL

- ✓ The '**Beneficiary Management**' application facilitates creation, add and change of beneficiary details automatically, on approval by the DDO. It saves time and resources of the department. The process-flow of the functionality is narrated below.

- ✓ '**Beneficiary Management**' Menu consists of the following two processes:-

    a.) *New Beneficiary Code creation (***Create New Beneficiary Request***); and*

    b.) *Beneficiary master data changes, which includes name corrections, Bank Account No. / AADHAAR / TAN / PAN / GSTIN addition and corrections, etc. (***Add / Change existing Beneficiary details***).*

- ✓ The Head of the Office shall configure work-flow and assign roles to the Maker and Checker on each of the said two processes. On configuring work-flow, the authorized User gets the **Beneficiary Management** Menu with the respective tile, viz., **Create New Beneficiary Request**; and **Add / Change existing Beneficiary details**.

- ✓ The Maker selects '**Beneficiary Management**' Menu; and proposes to create / add / change beneficiary details, as per the requirement; and due validations.

- ✓ The system generates a **Unique Request Number** and enables / facilitates the Maker to attach required documents and forward the request to the Checker / Submitter, as per pre-defined work-flow.

- ✓ The Checker (Optional) verifies and forwards the same to the Submitter, for approval. The proposal moves to the mapped Submitter with the role as per work-flow configured by the Head of the Office.

- ✓ After scrutiny, the Submitter approves the request. Thereby the Beneficiary Code is assigned or changes are updated automatically.

- ✓ The Submitter may send back the request with due observations to the Checker of the proposal or Return to the maker as well.

- ✓ All (*****) fields are mandatory.

- ✓ The Users of the Department will be facilitated with **Beneficiary Request Details Report**, to know the status of the proposal.

- ✓ Process-flow mechanism along with Snapshots is shown hereunder:-

a.) Creation of New Beneficiary:-
DDO - Maker (Mandatory):-

(**Snapshot.01**)

(**Snapshot.02**)

(**Snapshot.03**)

(**Snapshot.04**)

(**Snapshot.05**)

(**Snapshot.06**)
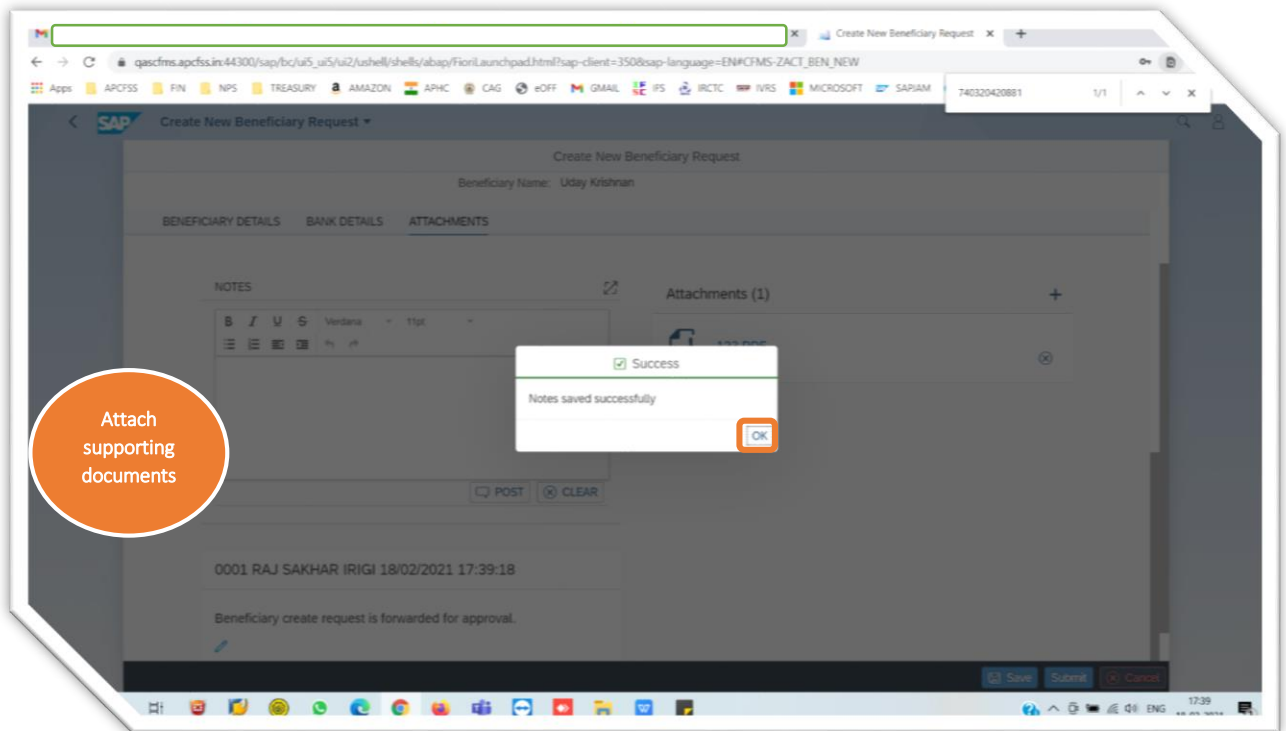
(**Snapshot.07**)
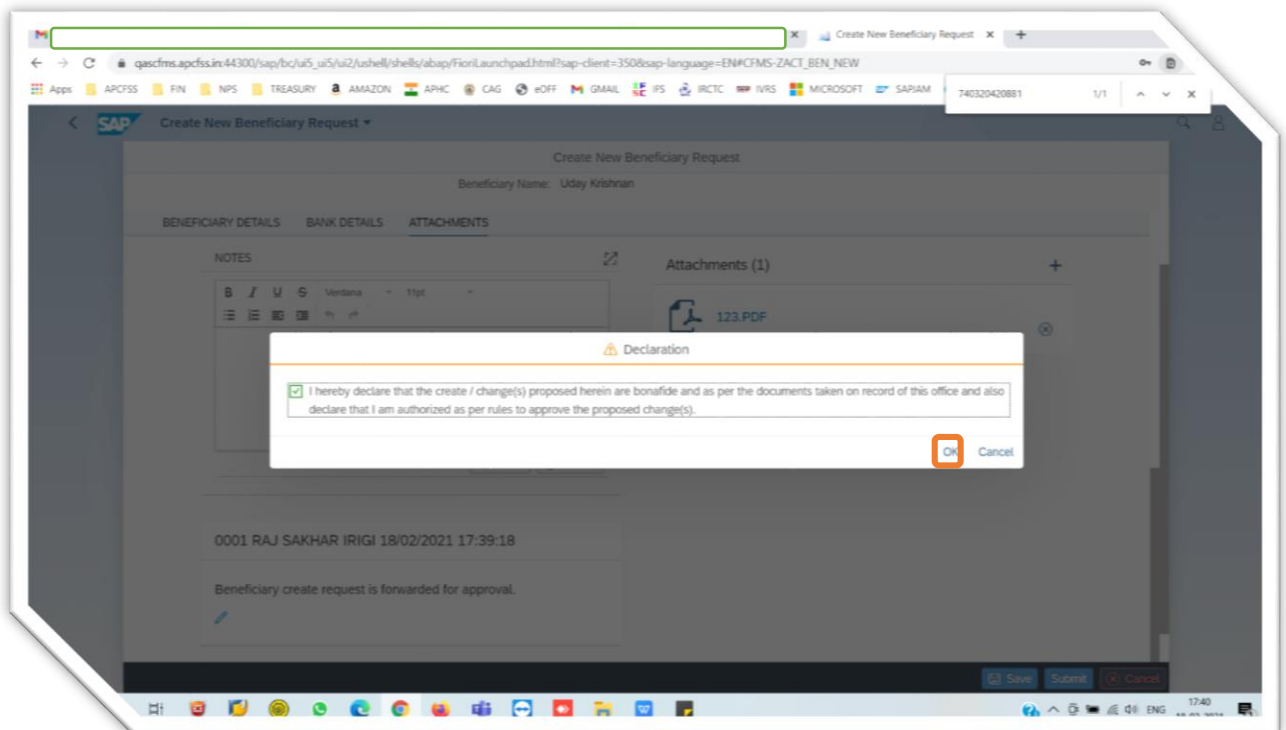
(**Snapshot.08**)
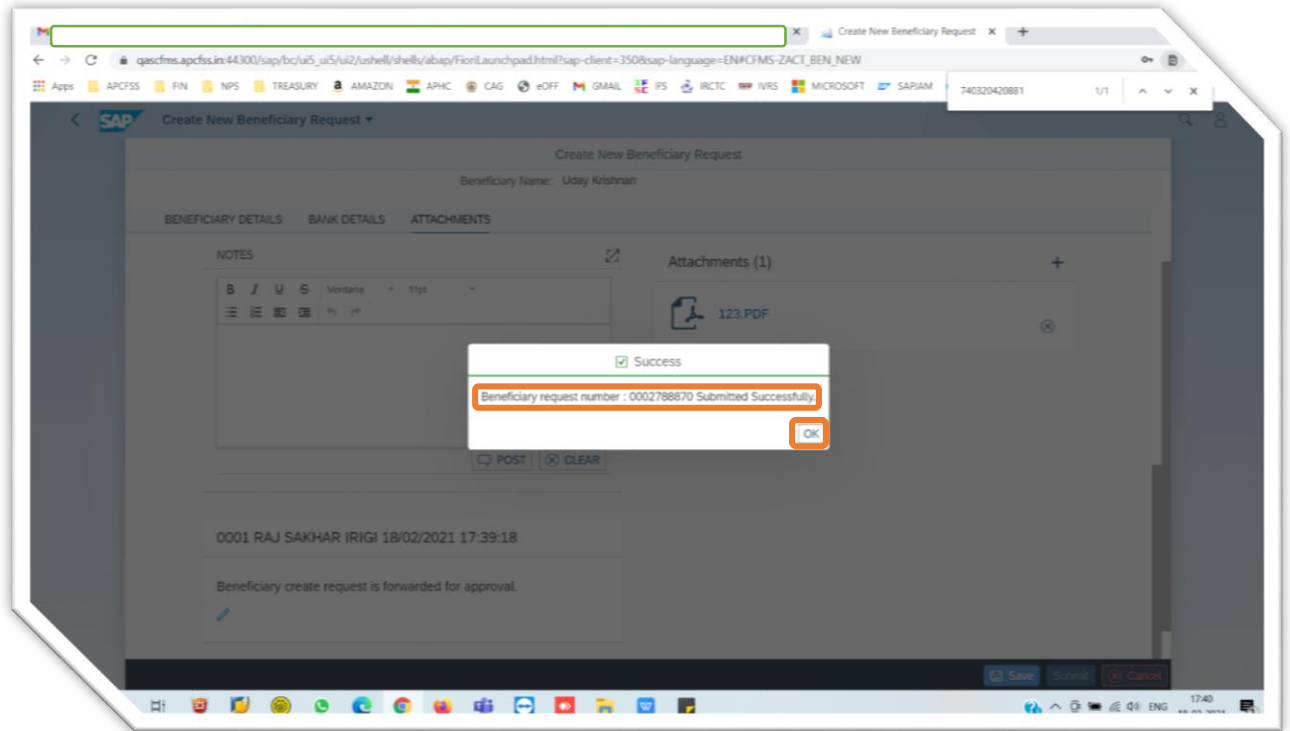
(**Snapshot.09**)

DDO - Checker (Optional):-
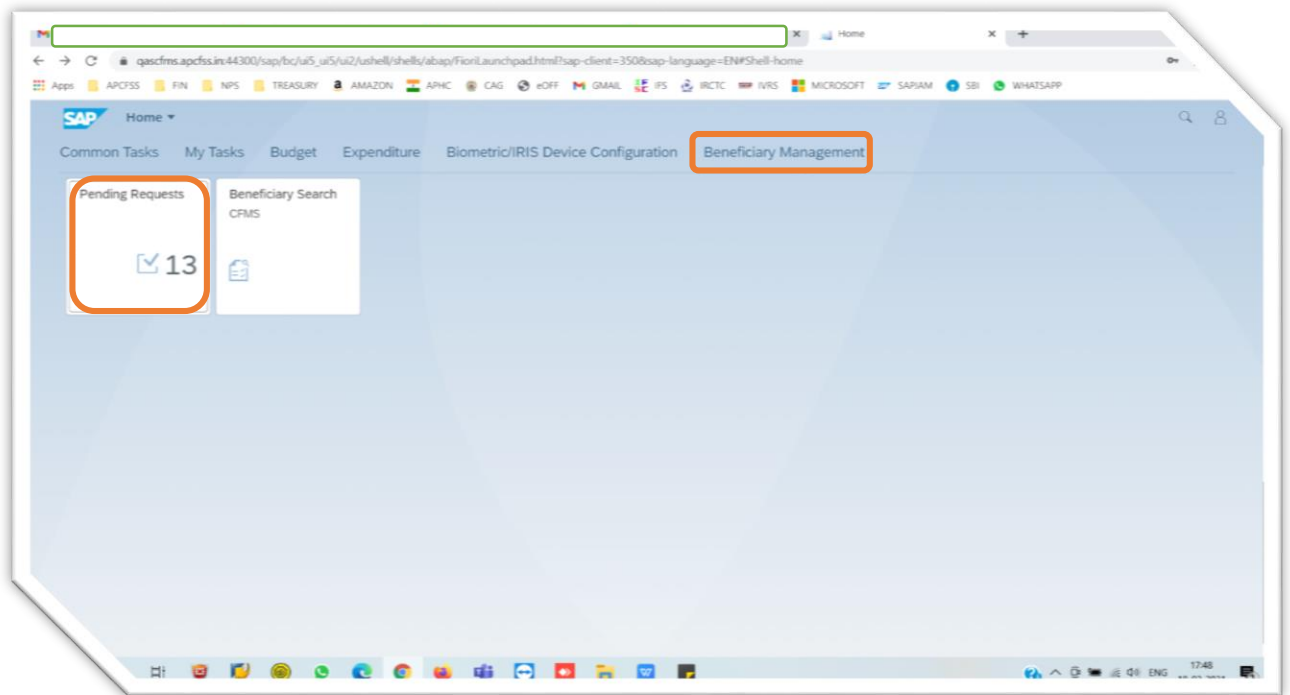
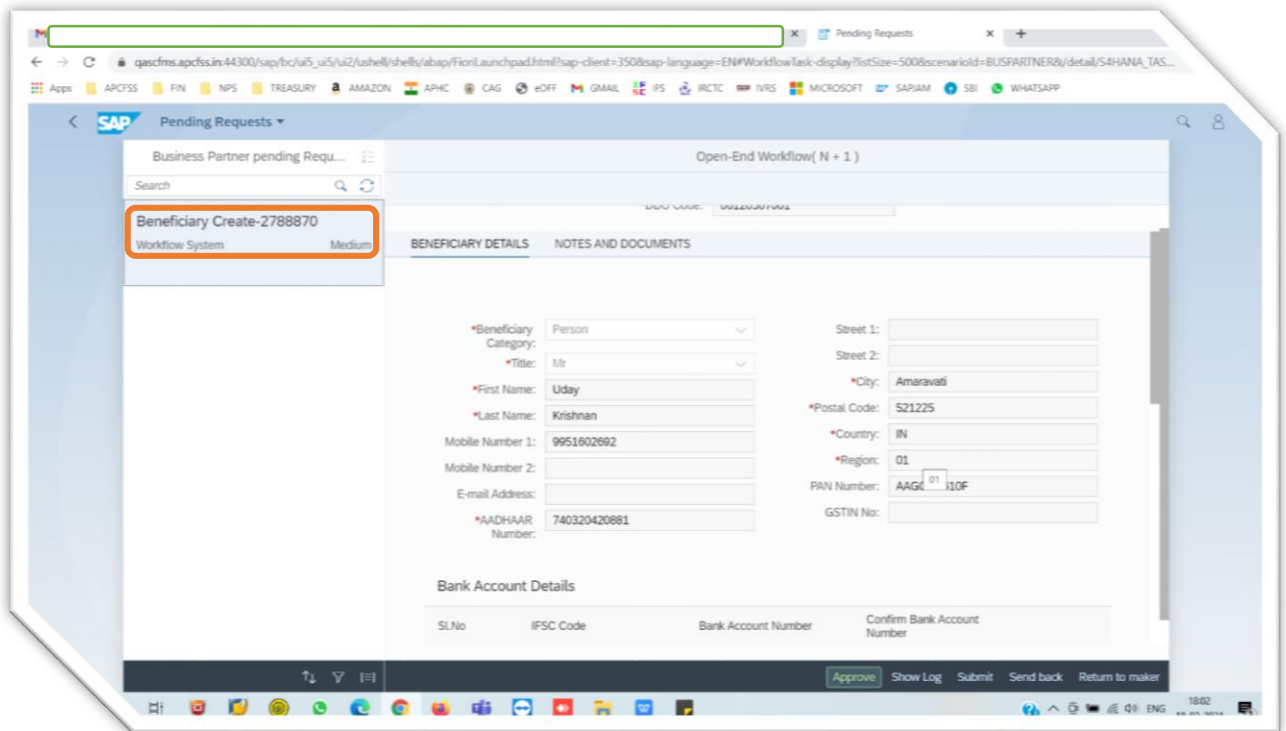(**Snapshot.10**)
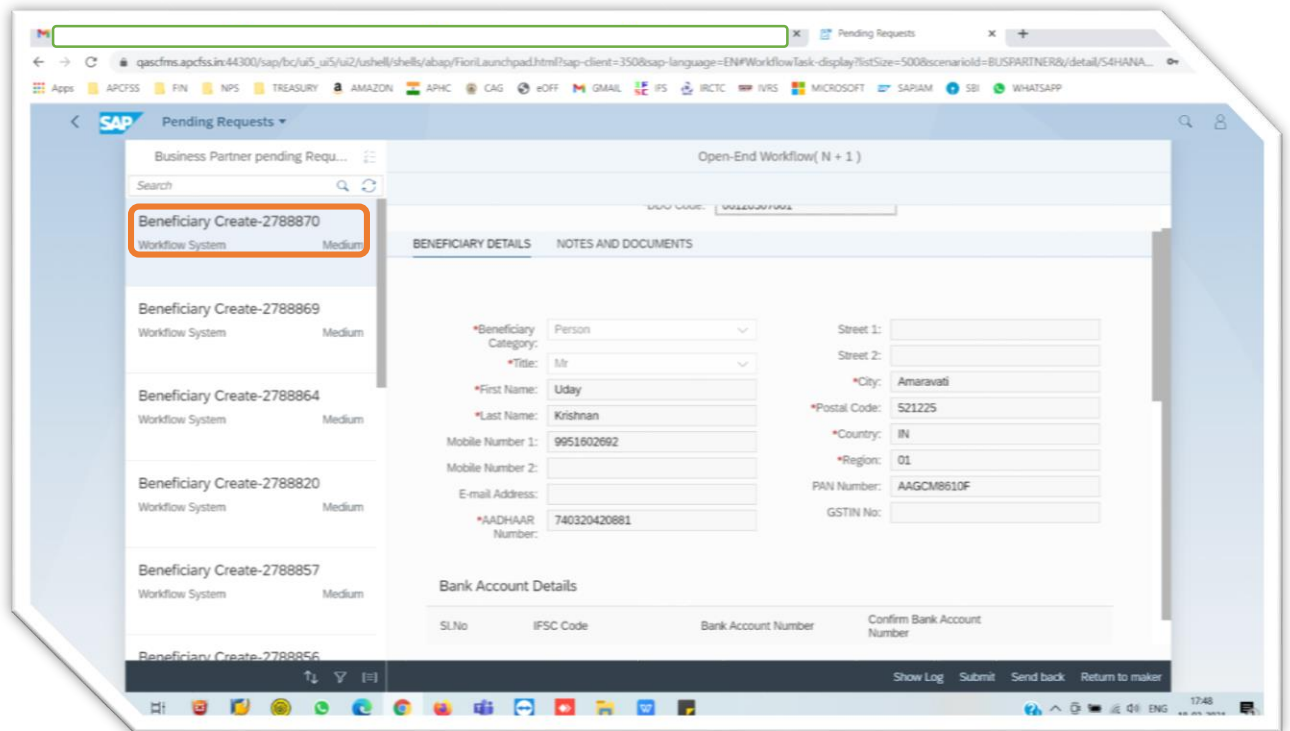
(**Snapshot.11**)
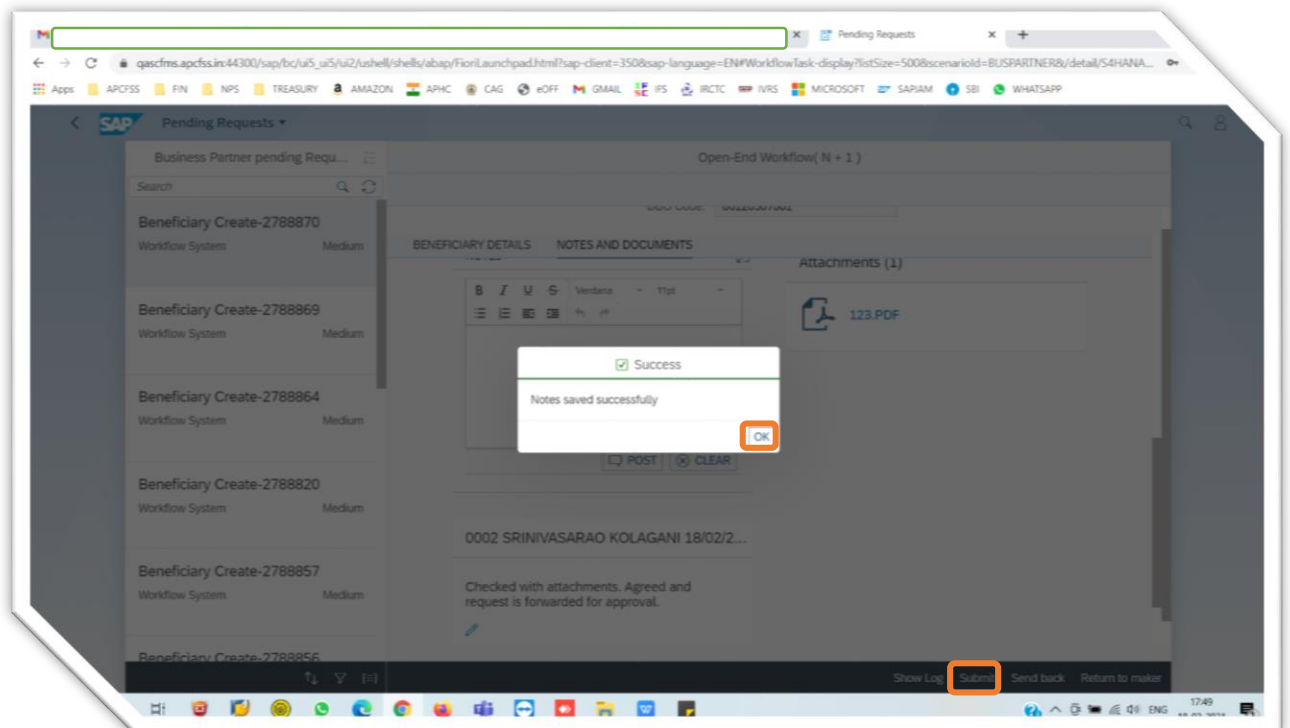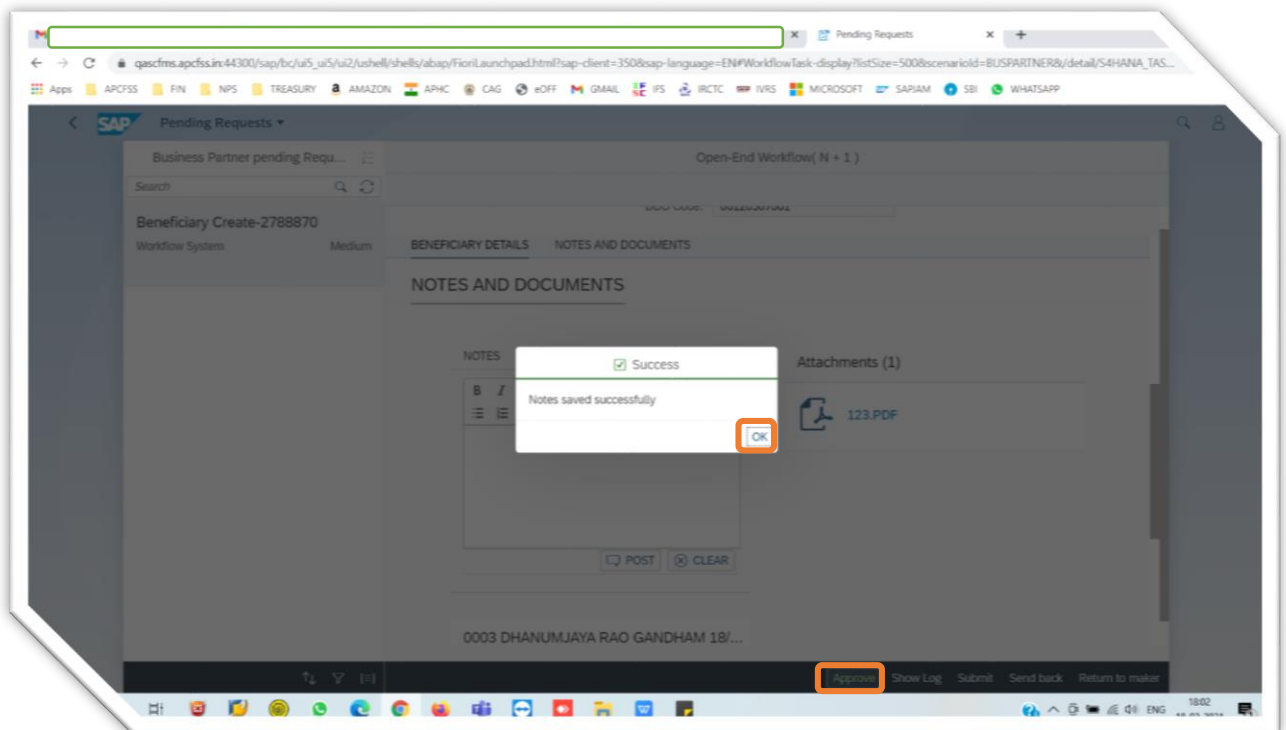

(**Snapshot.12**)
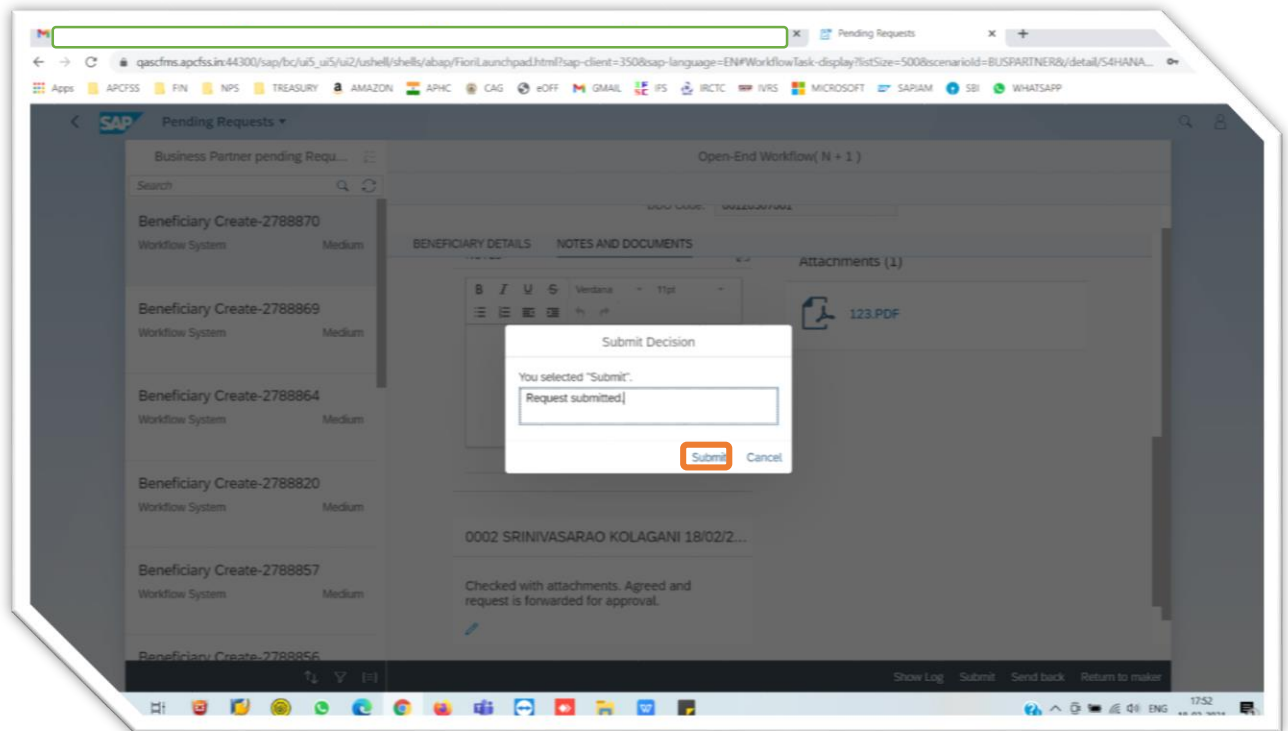
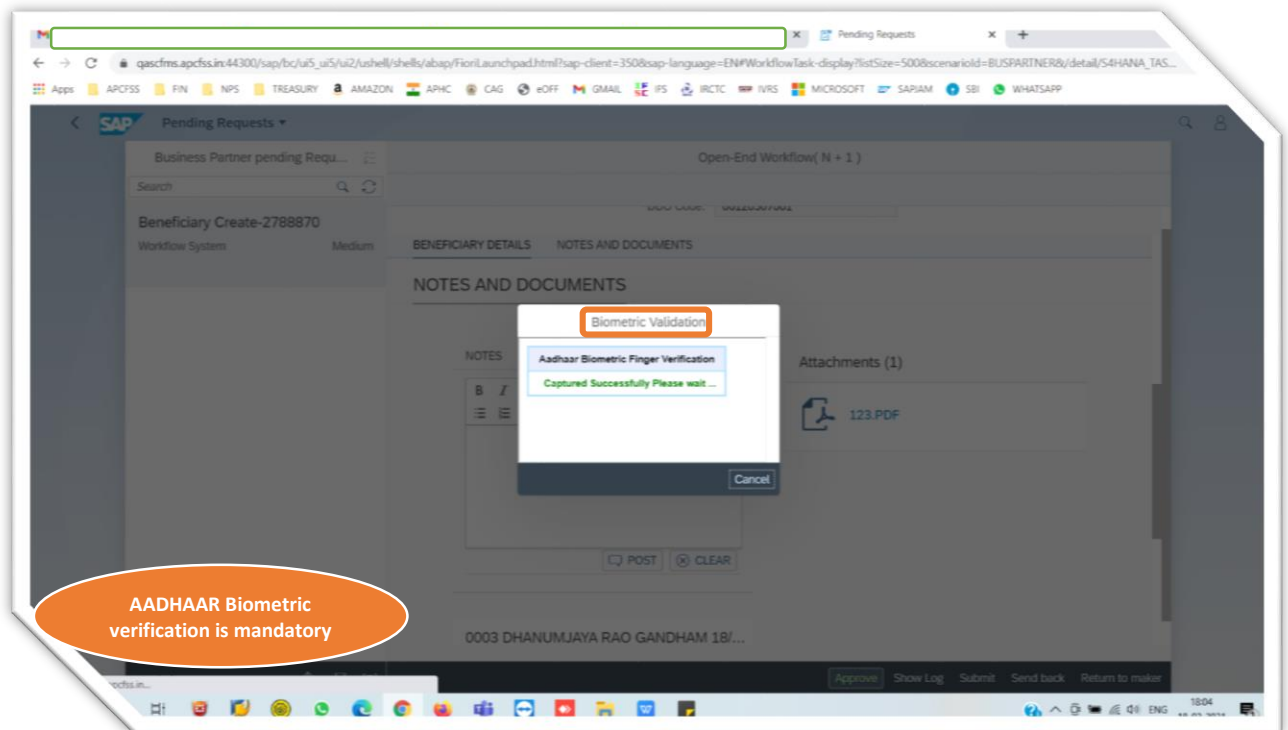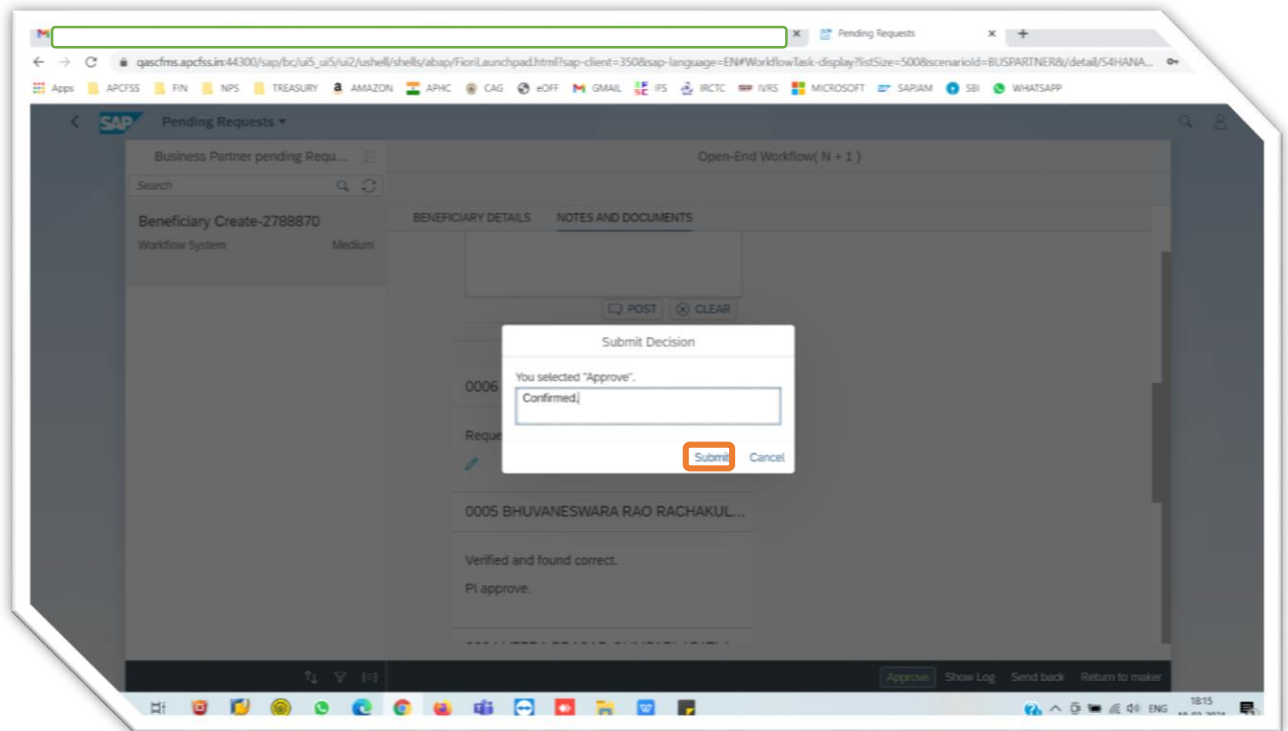(**Snapshot.13**)

DDO - Submitter (Mandatory):-
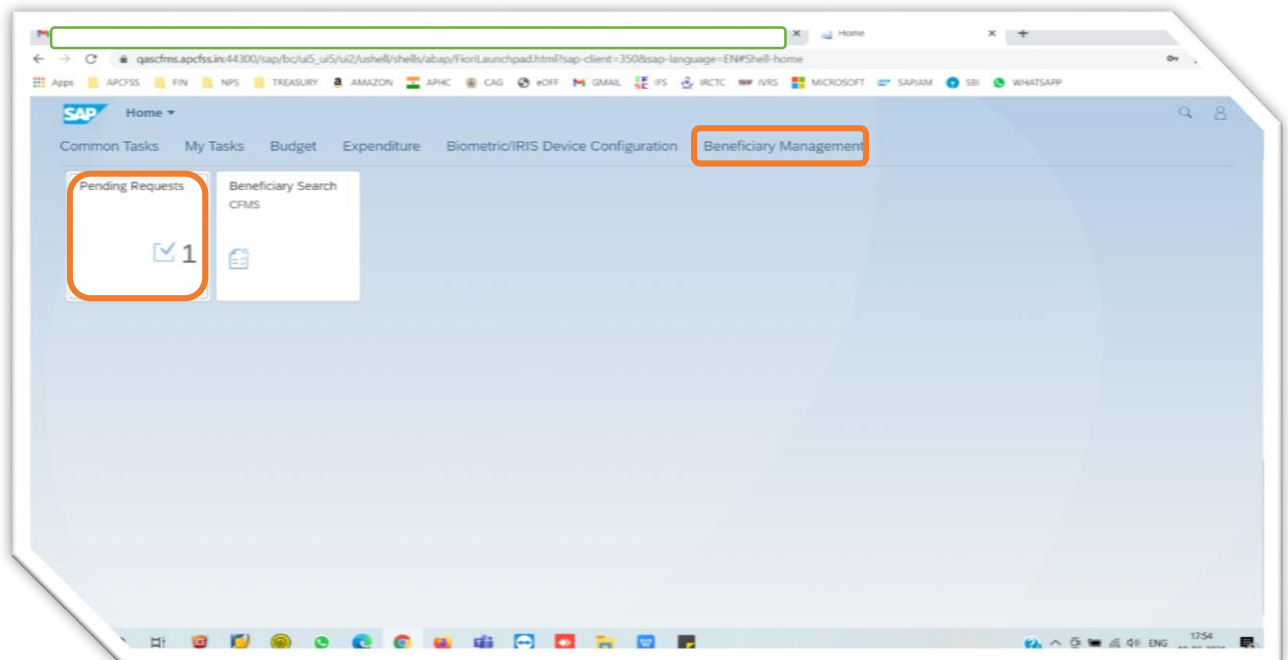
(**Snapshot.14**)

(**Snapshot.15**)

(**Snapshot.16**)

(**Snapshot.17**)

AADHAAR Biometric verification is mandatory
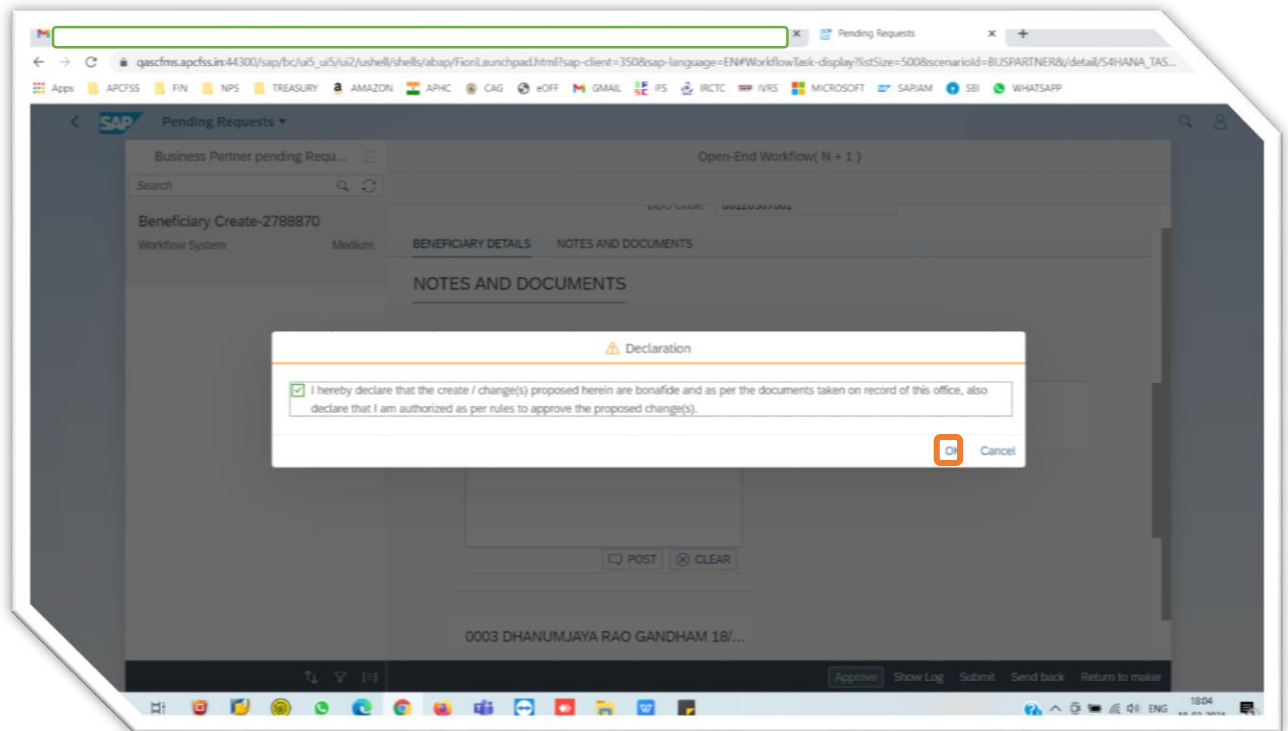
(**Snapshot.18**)
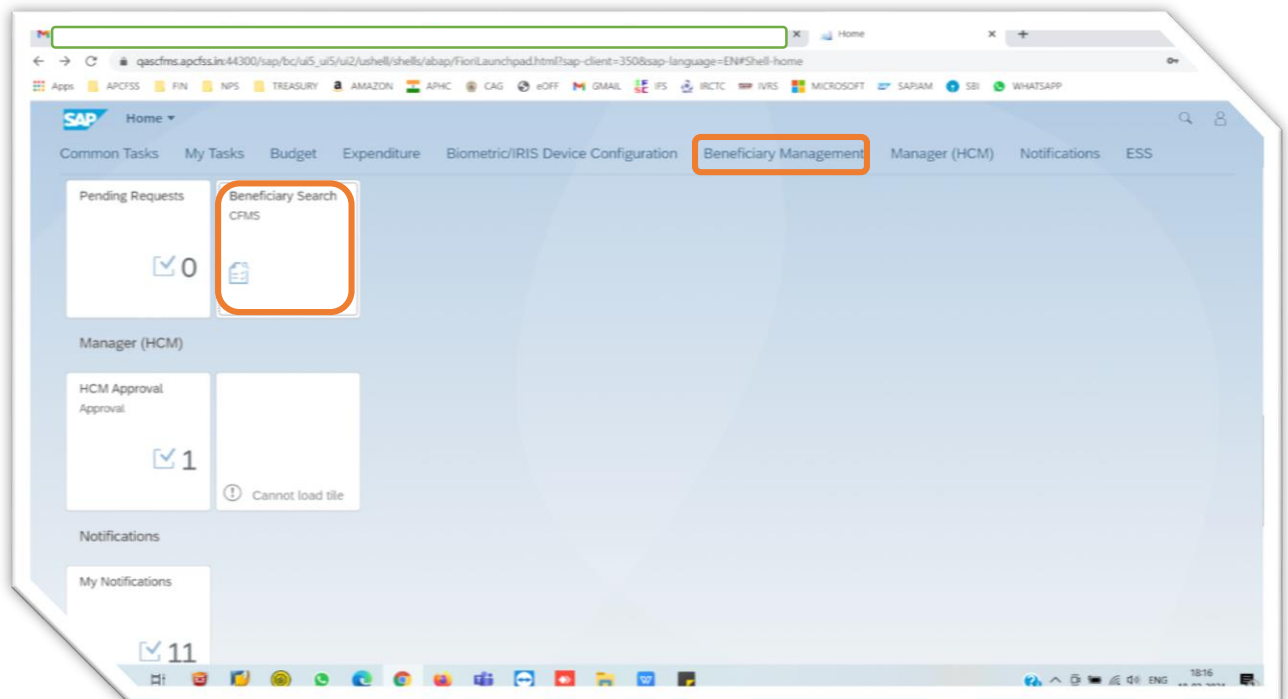
(**Snapshot.19**)

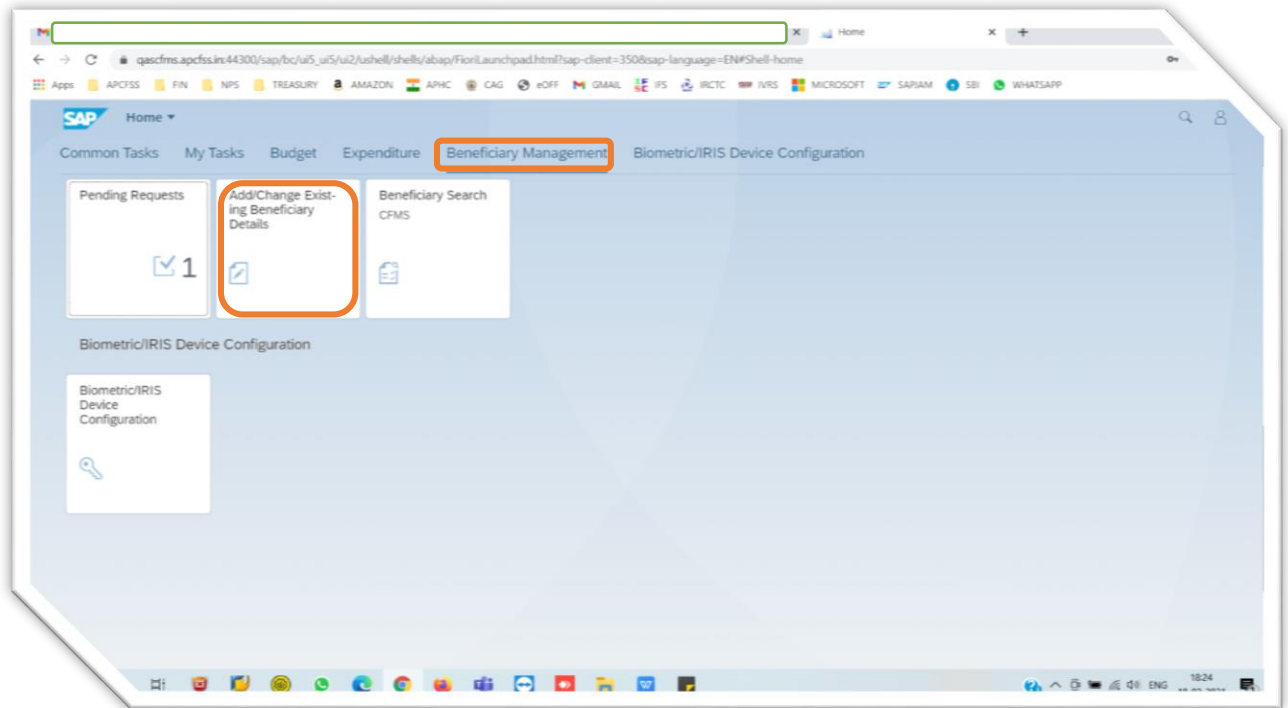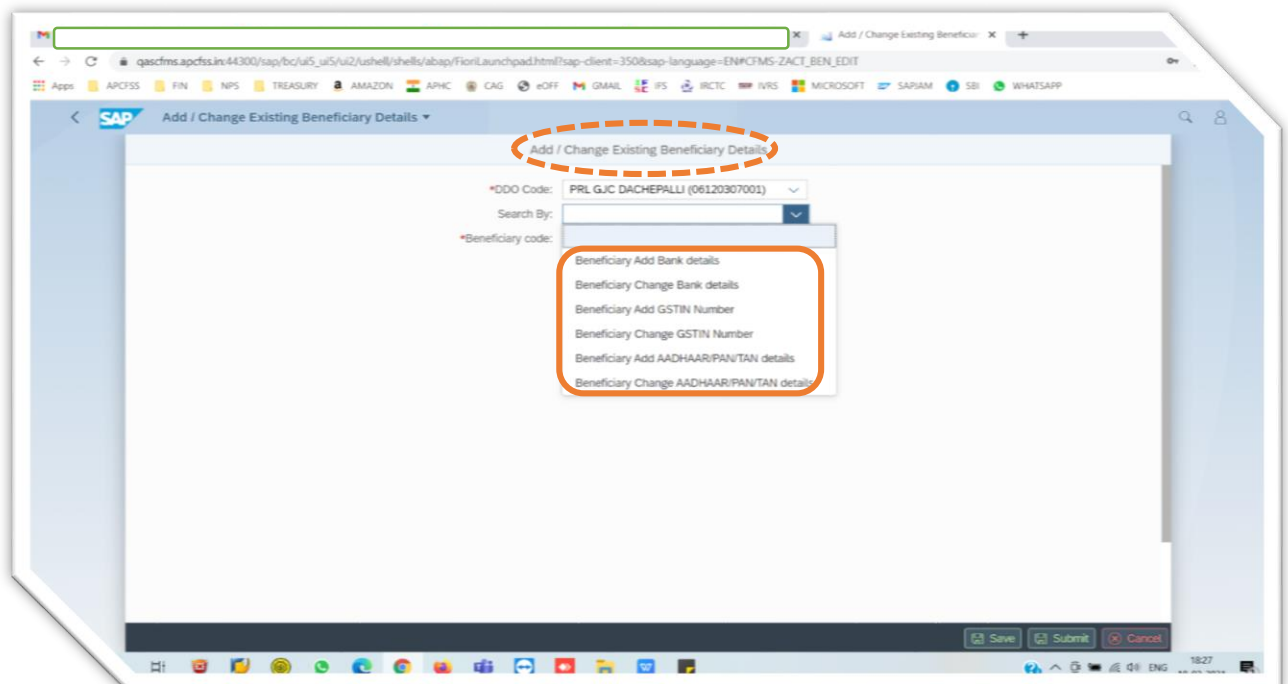(**Snapshot.20**)
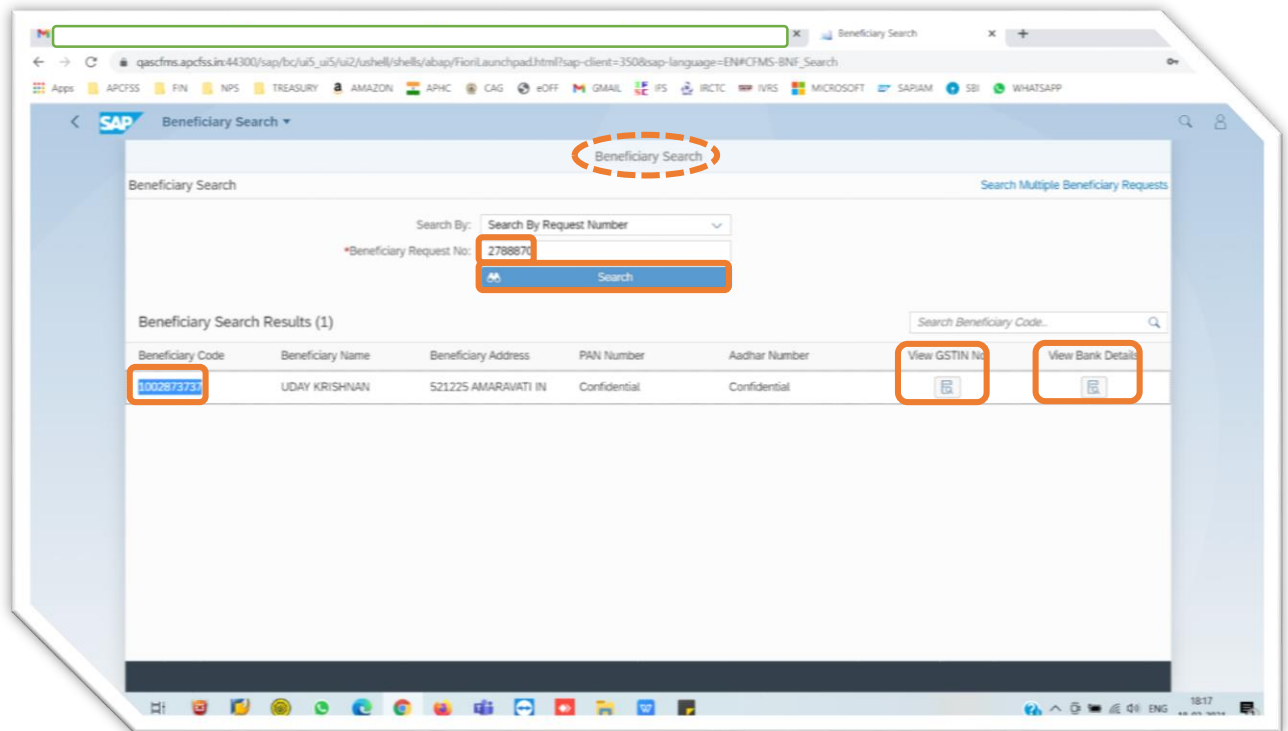
(**Snapshot.21**)

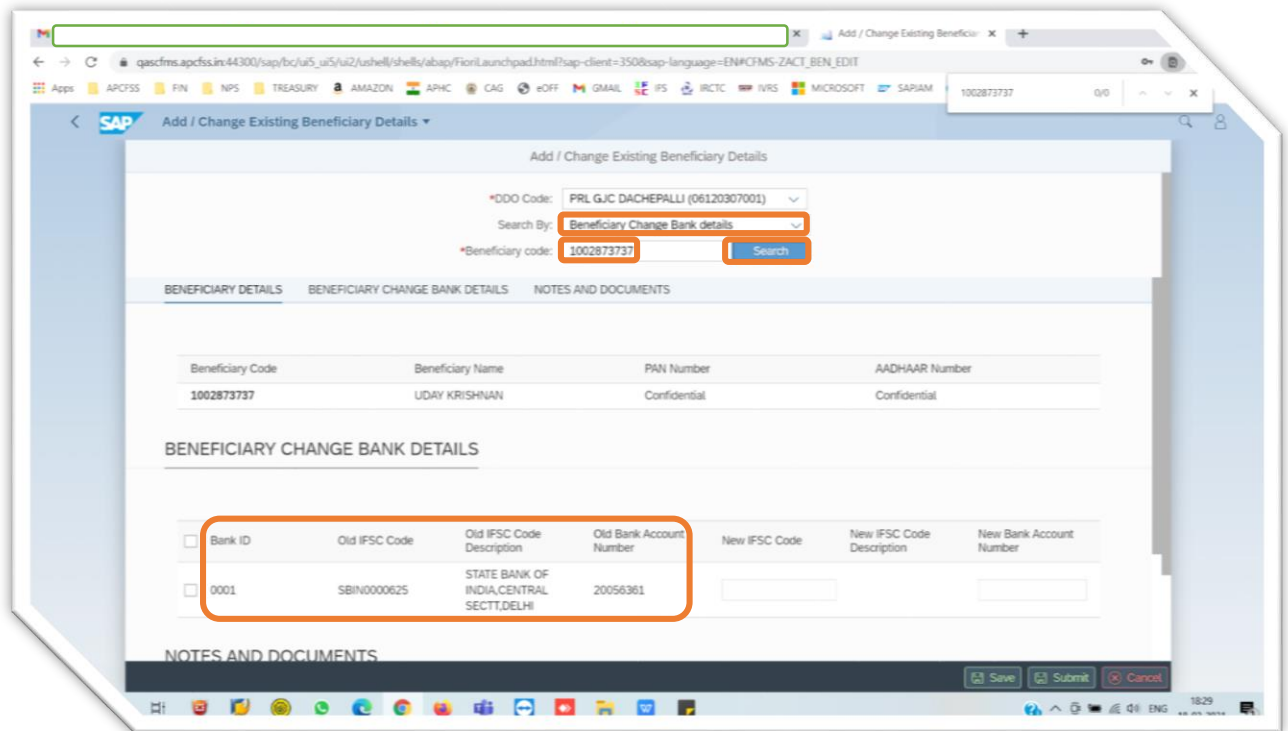b.) <mark>Add (Bank A/c No. / GSTIN / AADHAAR / PAN / TAN) to the existing Beneficiary</mark>:-
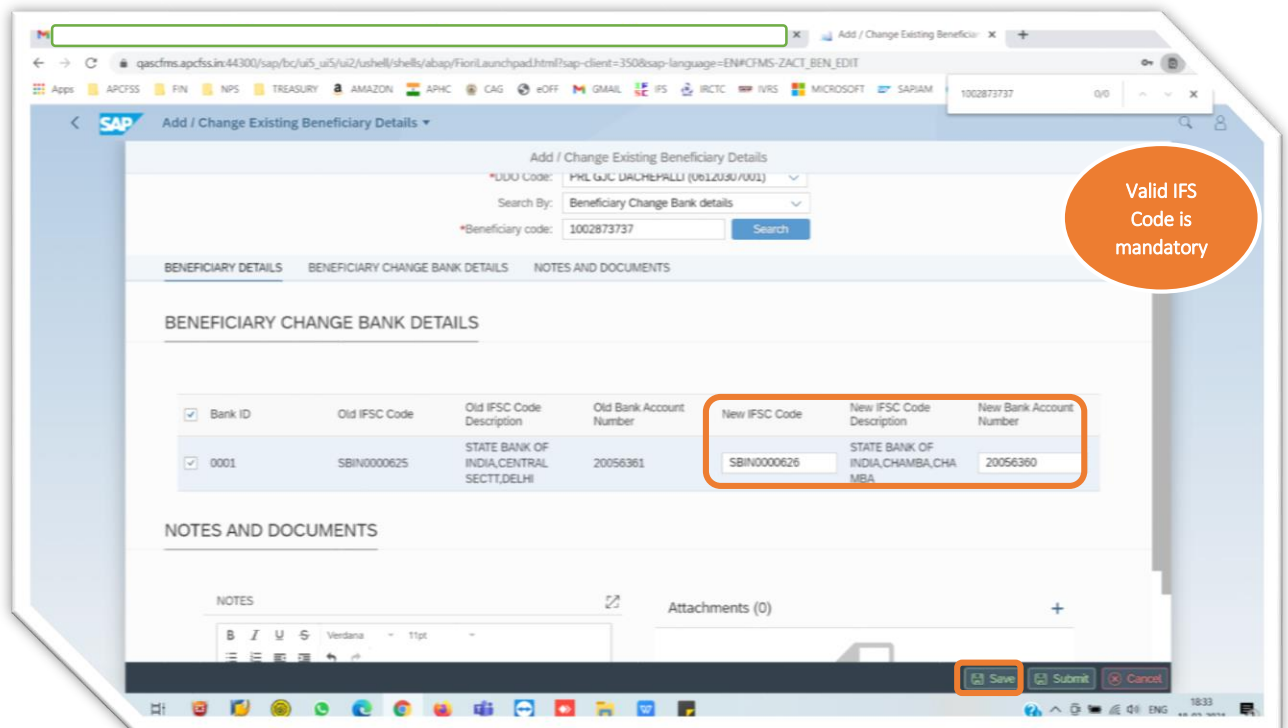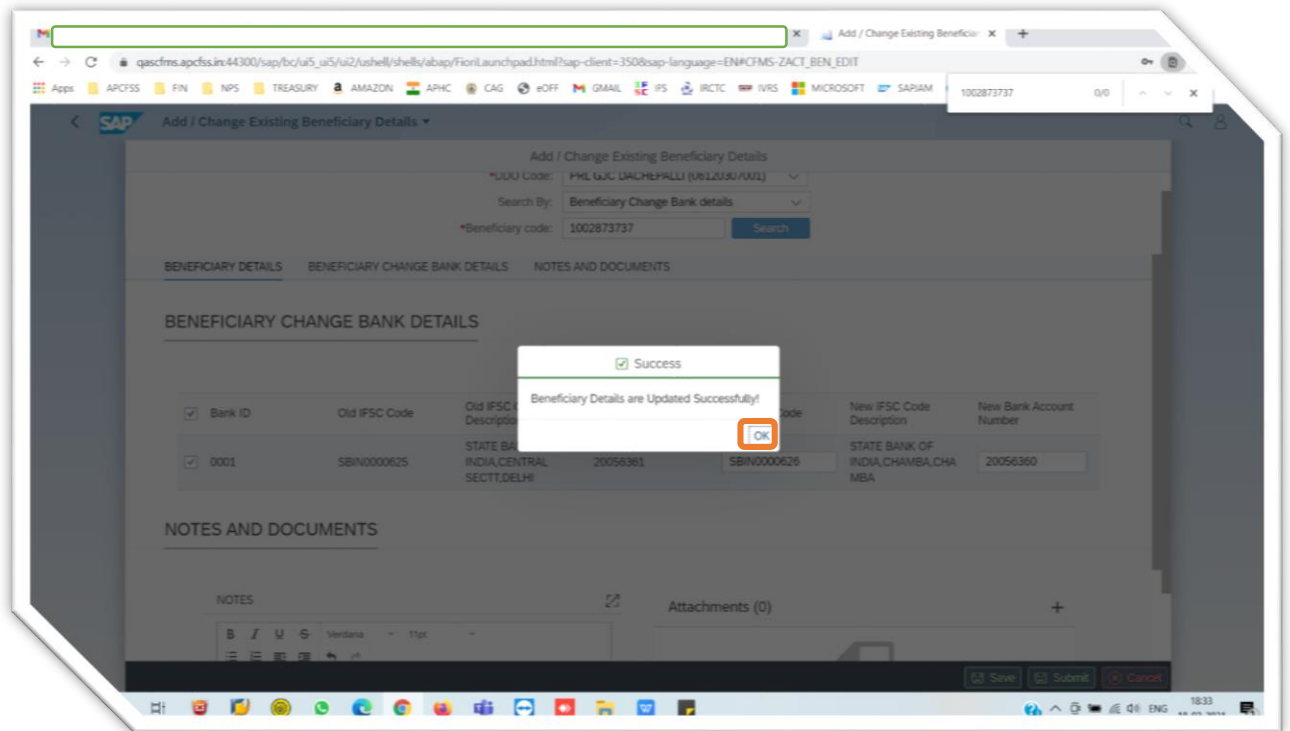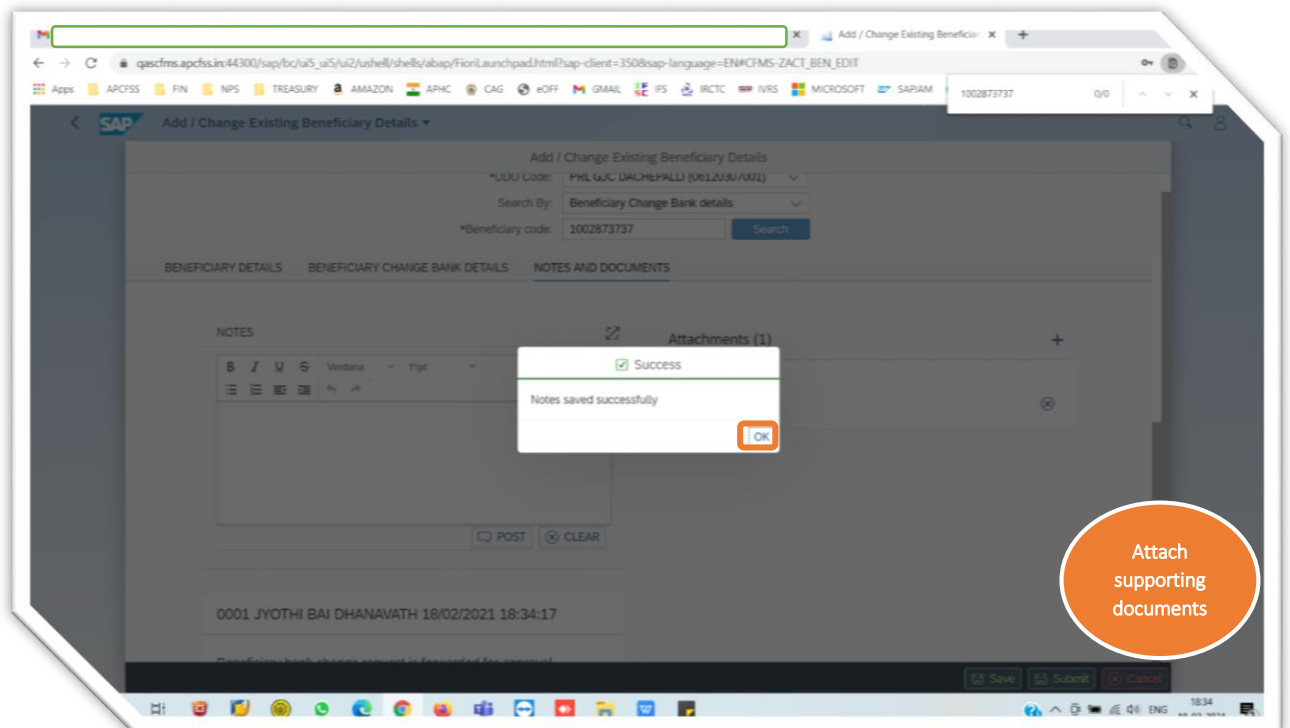<mark>DDO - Maker</mark> (Mandatory):-
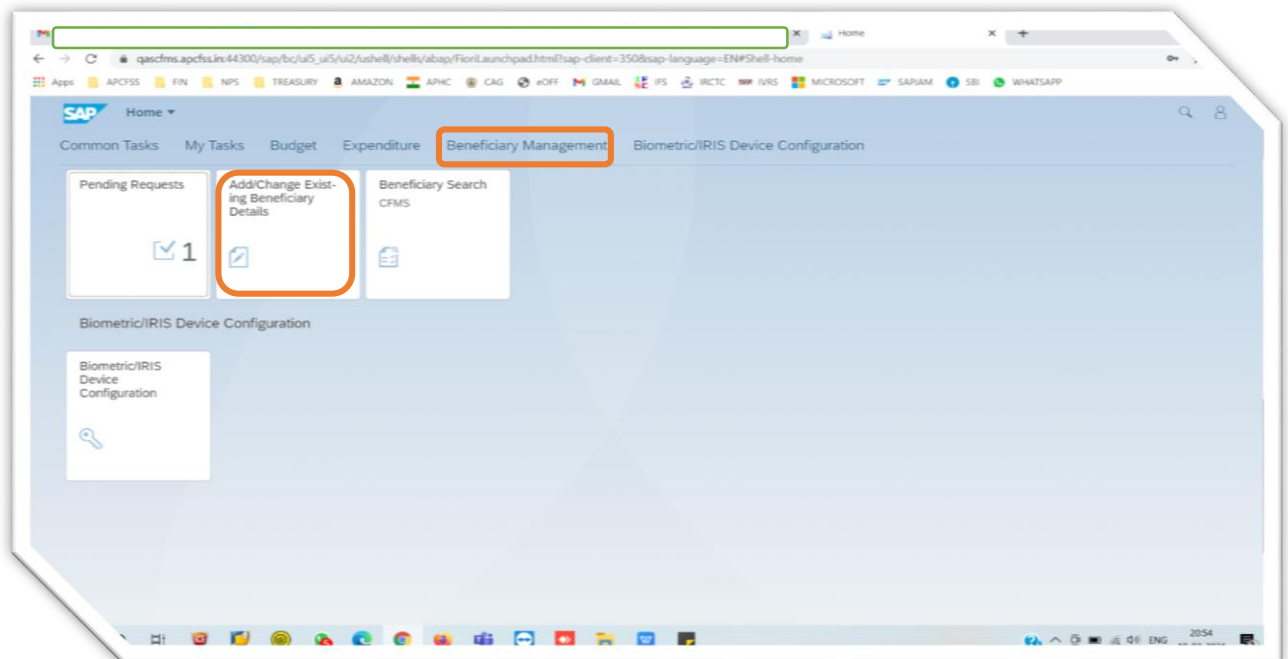
(**Snapshot.22**)
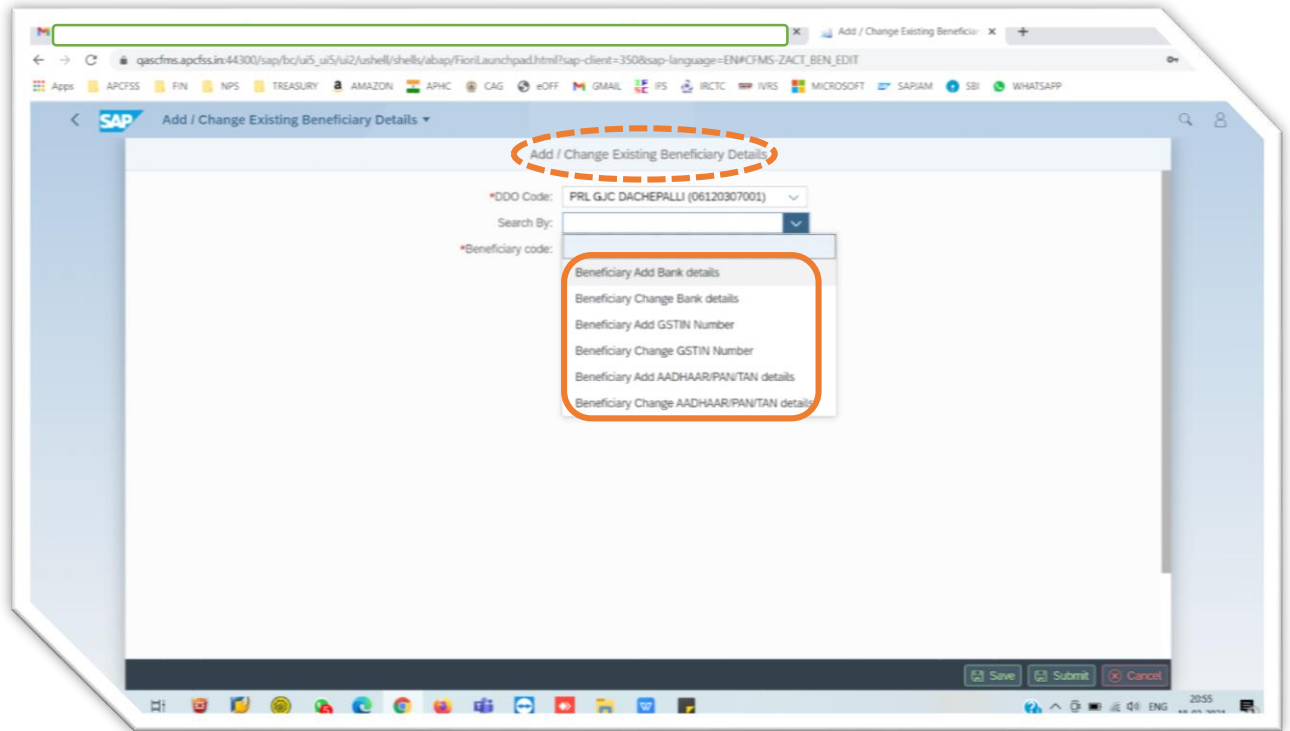
(**Snapshot.23**)
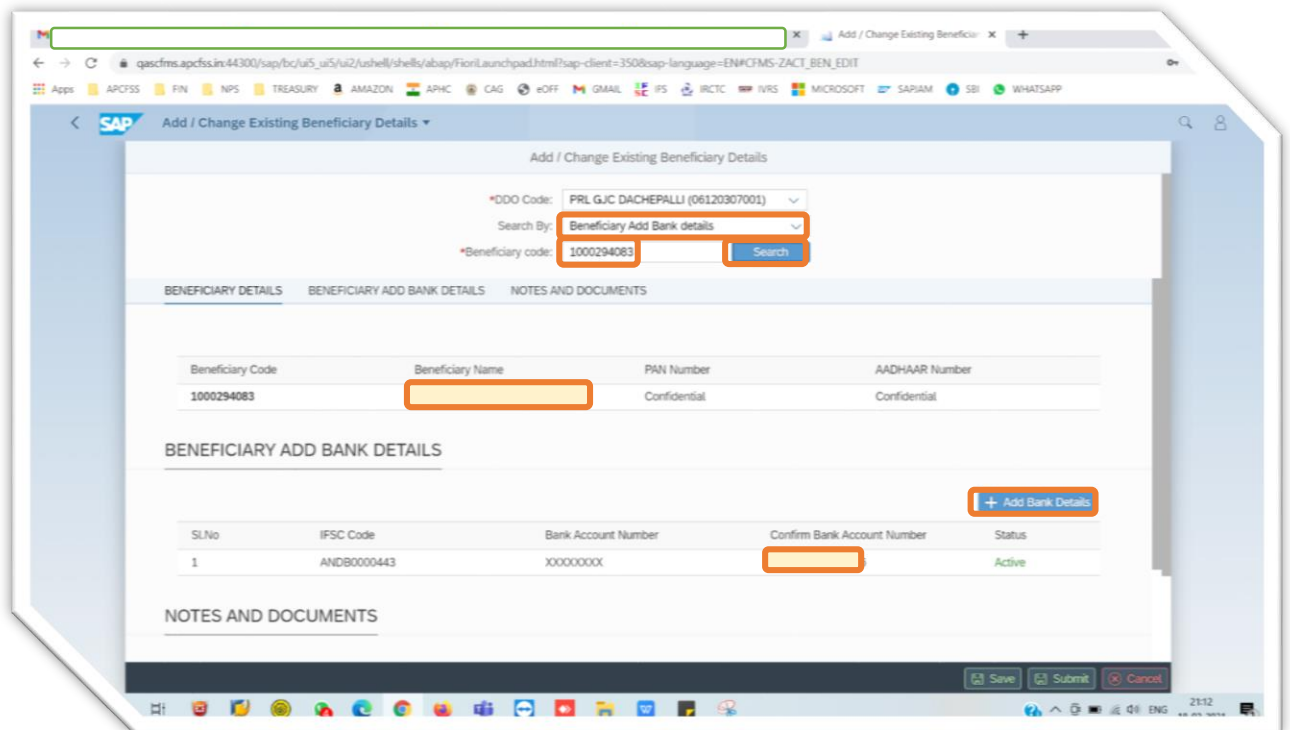
(**Snapshot.24**)
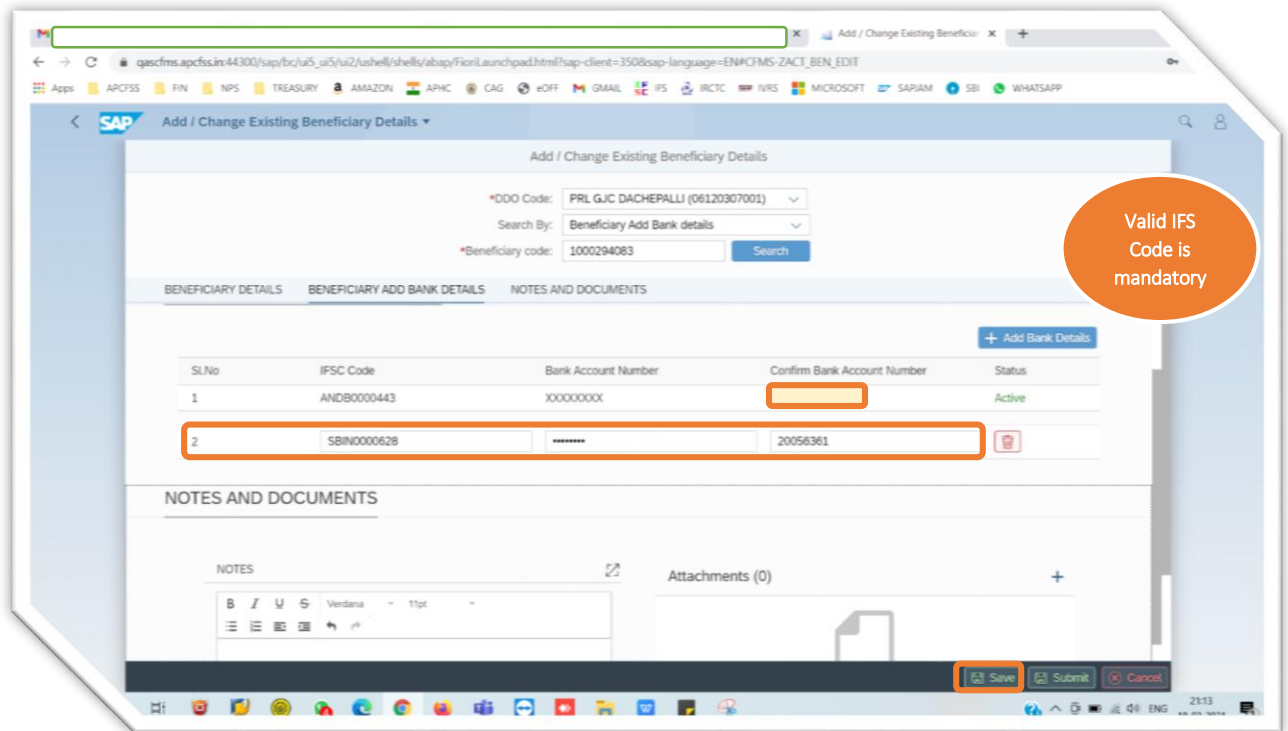
(**Snapshot.25**)
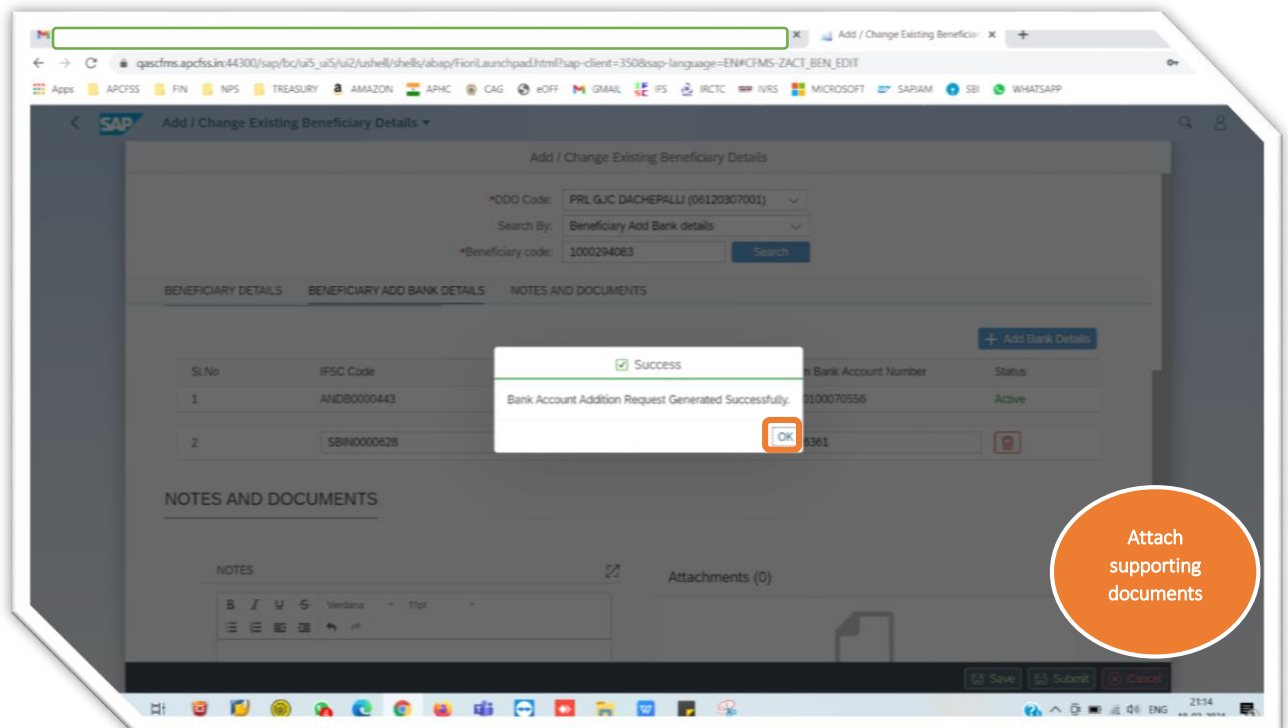
(**Snapshot.26**)
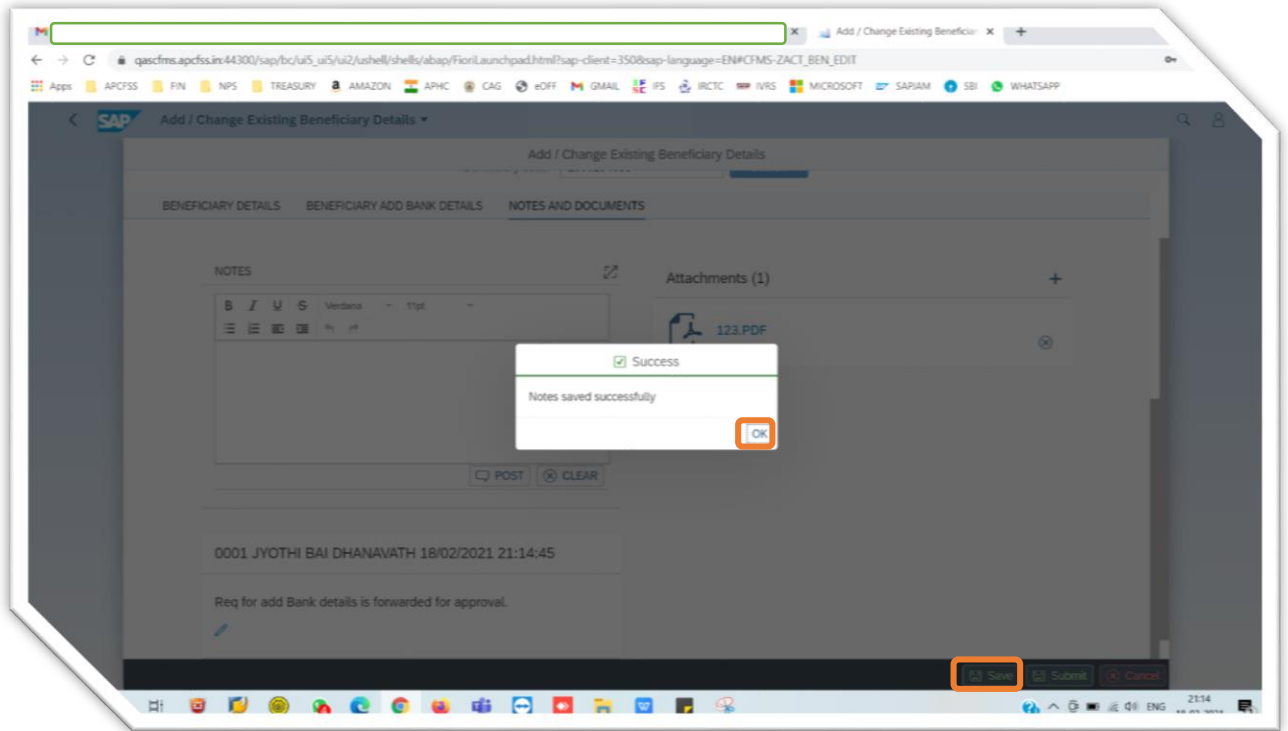
(**Snapshot.27**)
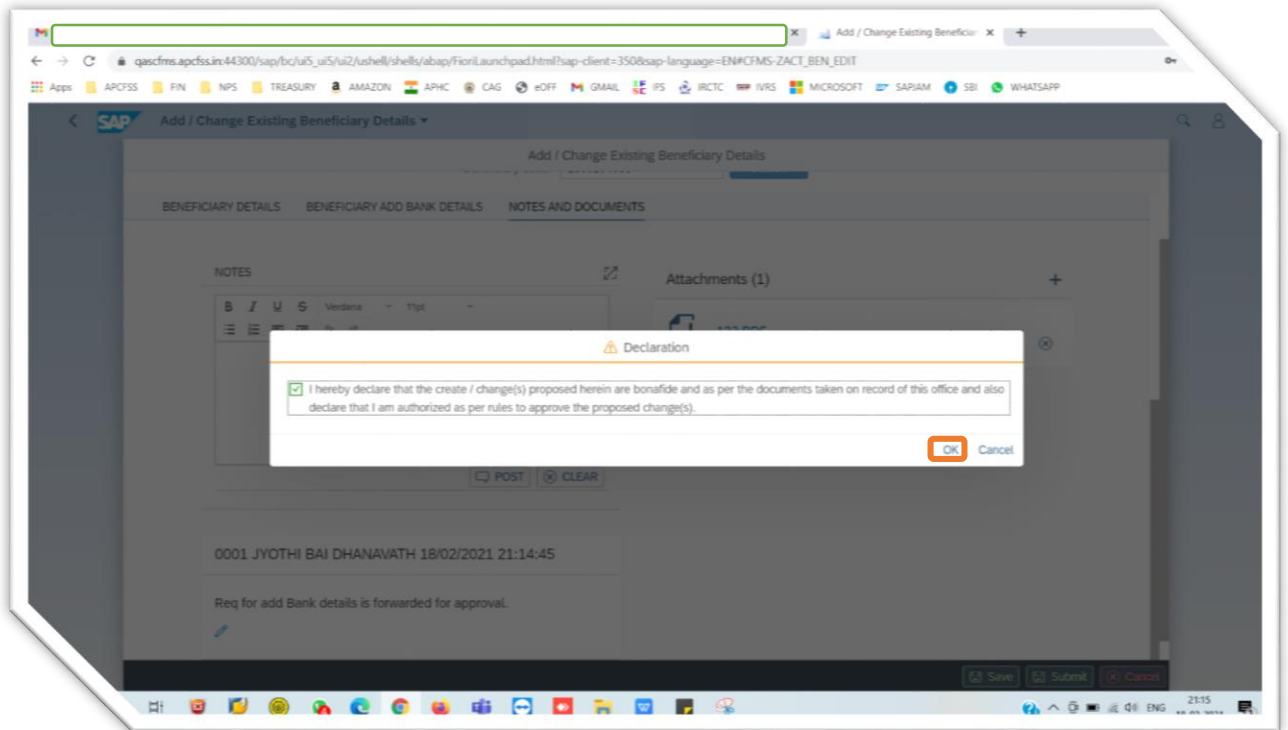
(**Snapshot.28**)
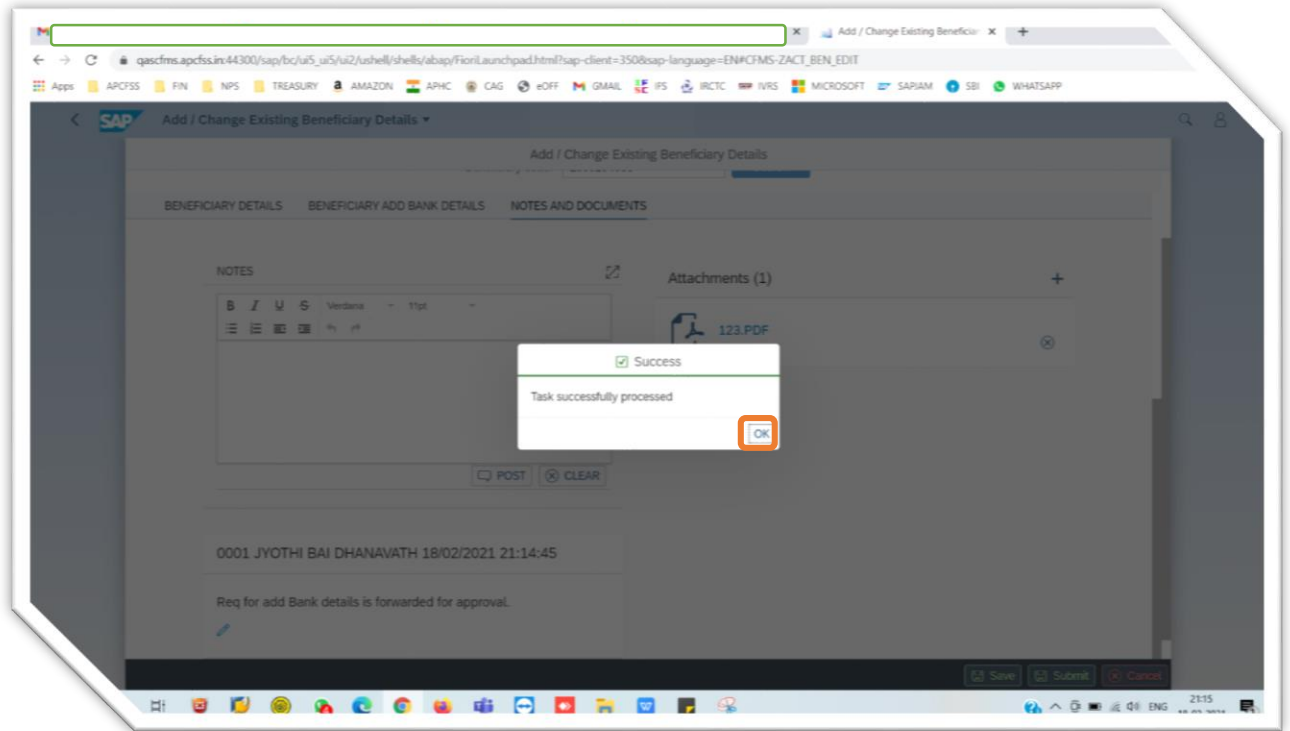
(**Snapshot.29**)

DDO - Checker (Optional):-

(**Snapshot.30**)

(**Snapshot.31**)

(**Snapshot.32**)

(**Snapshot.33**)
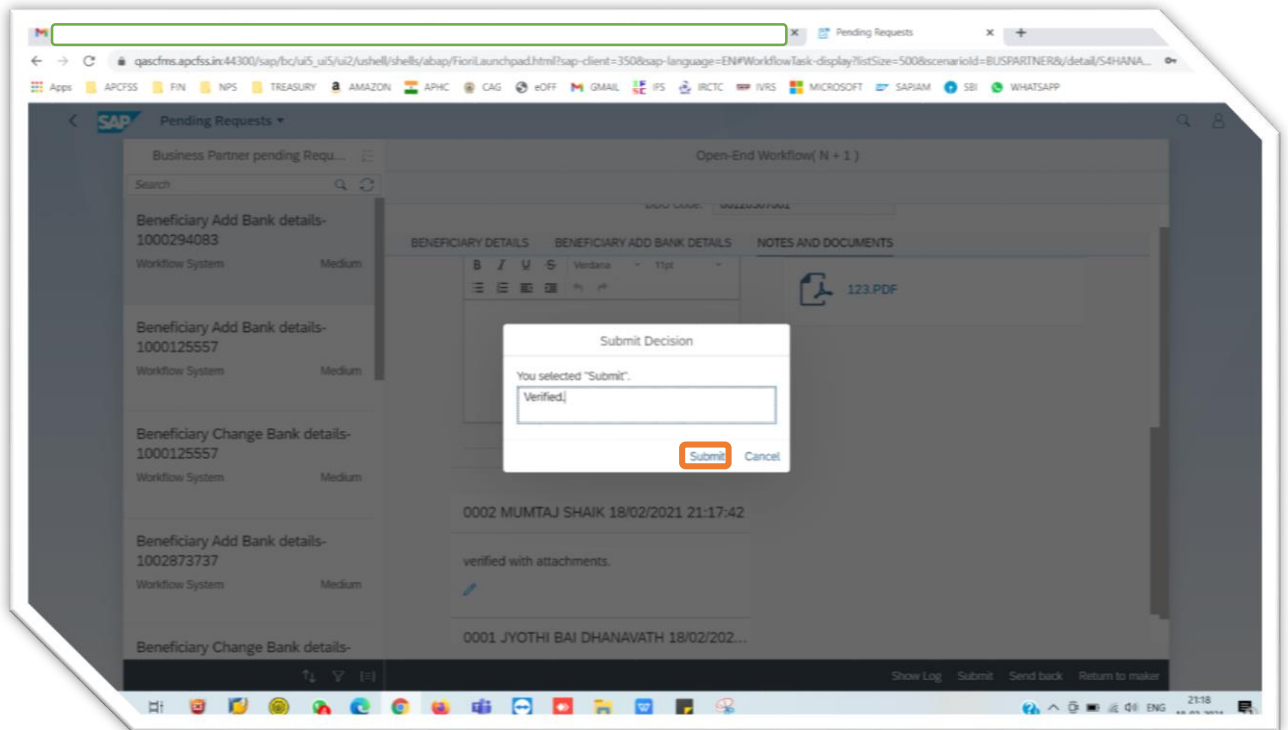
(**Snapshot.34**)

DDO - Submitter (Mandatory):-
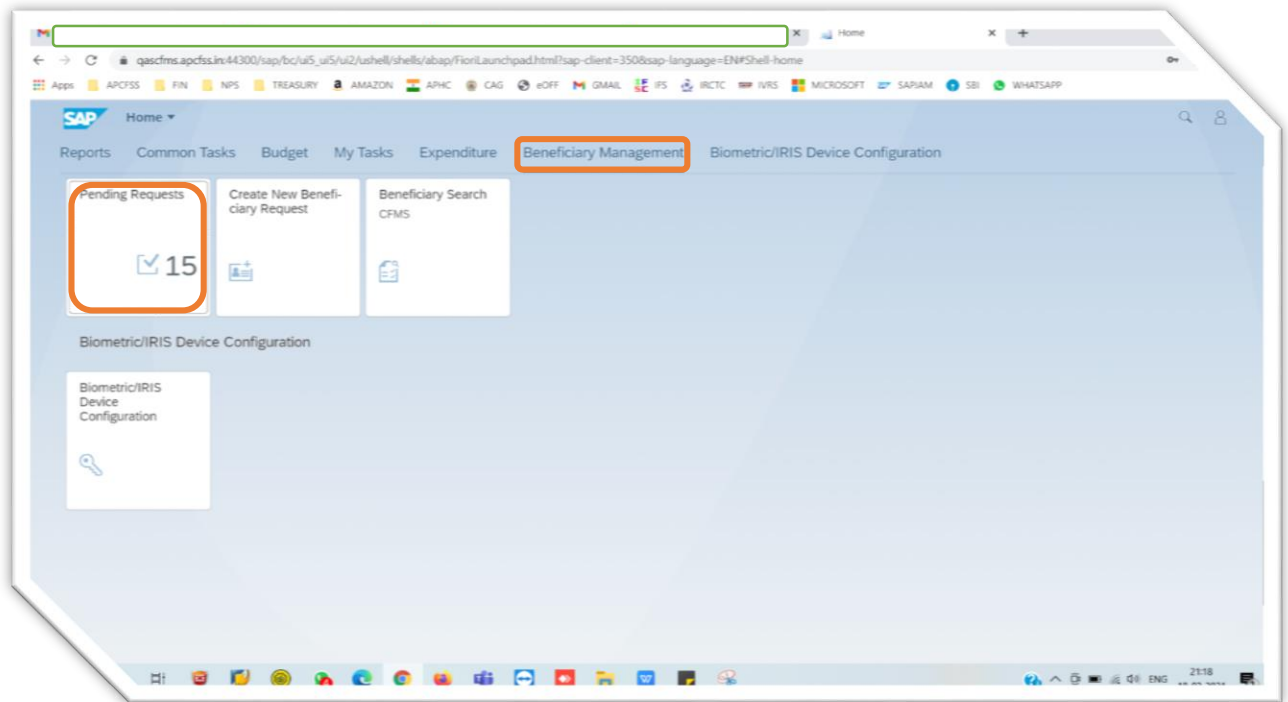
(**Snapshot.35**)
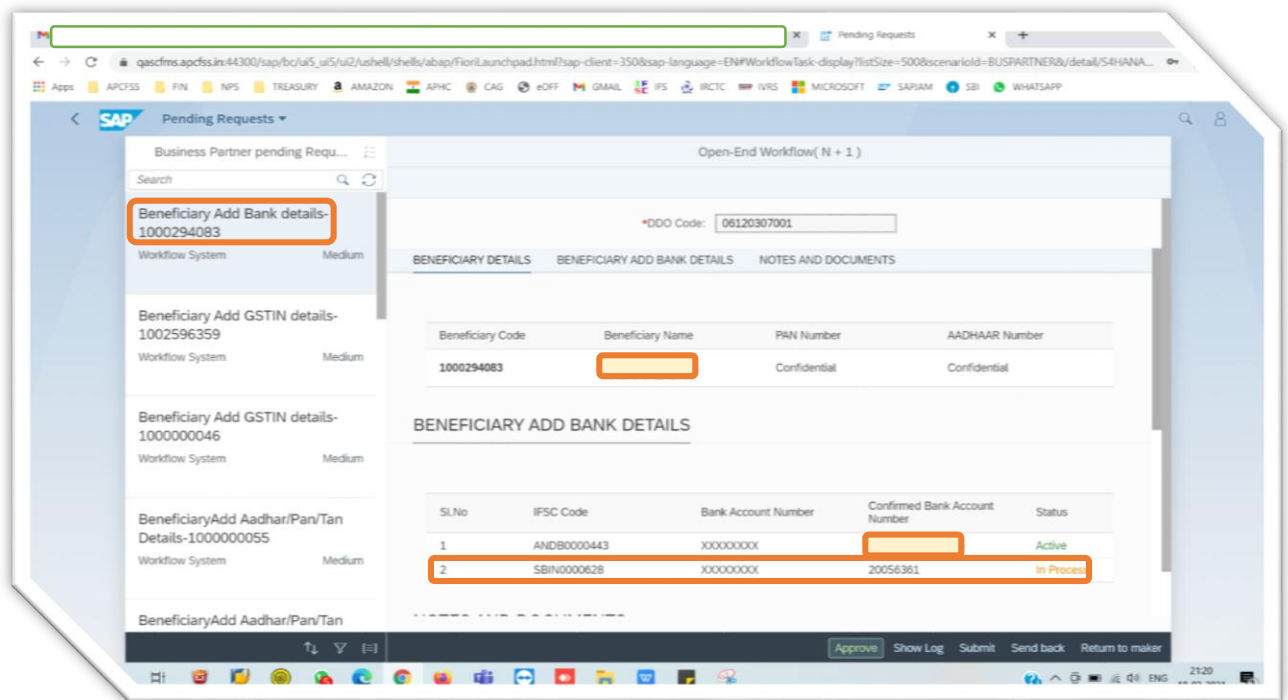
(**Snapshot.36**)
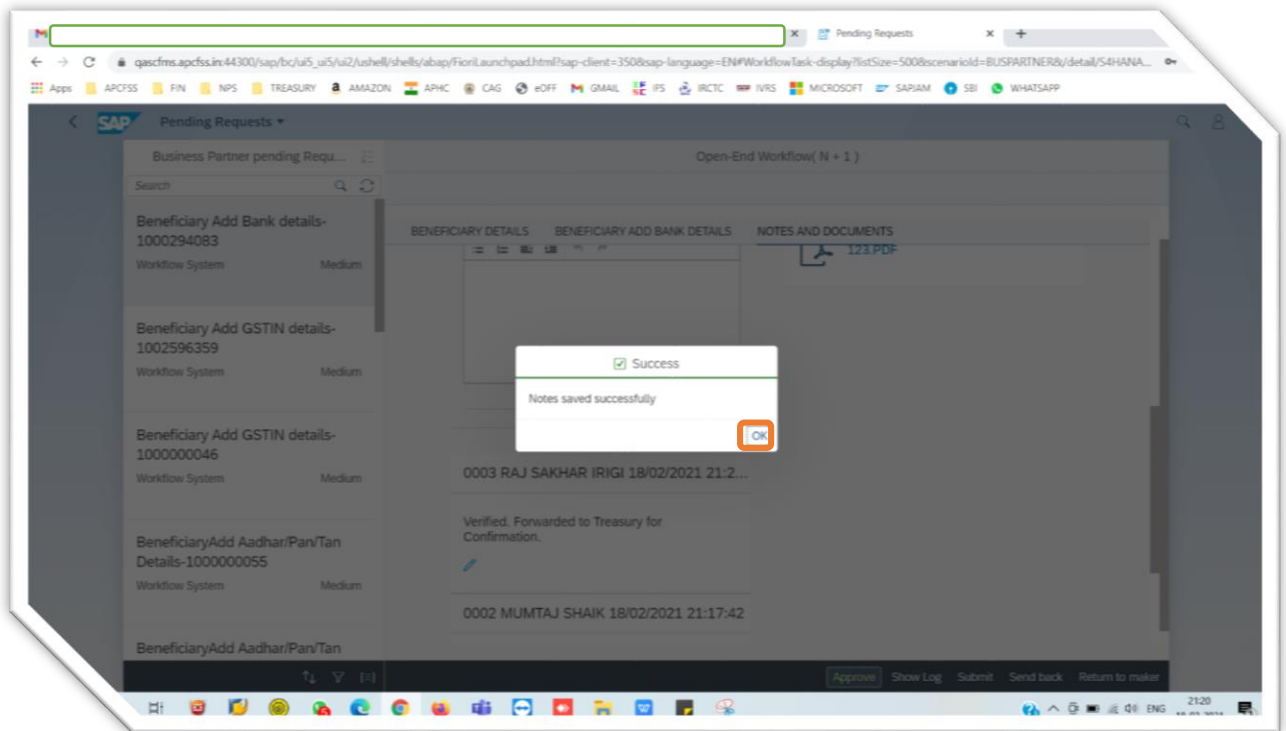
(**Snapshot.37**)
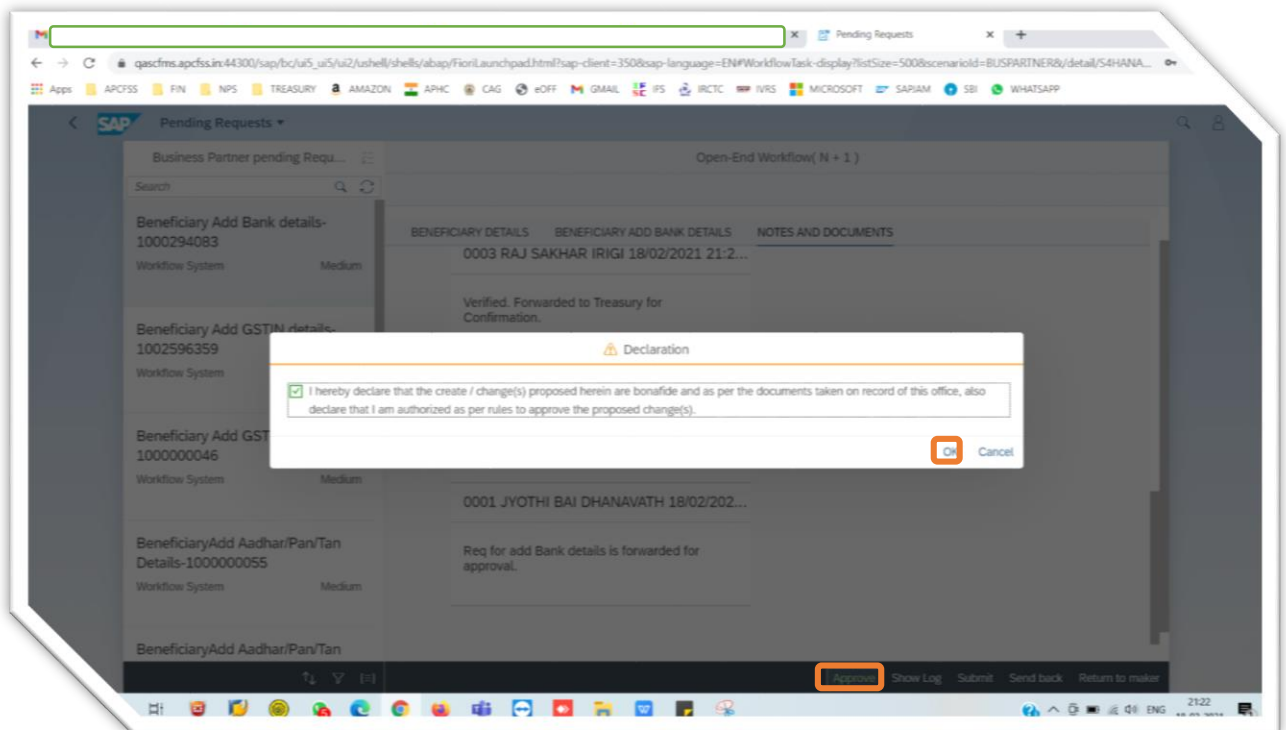
(**Snapshot.38**)
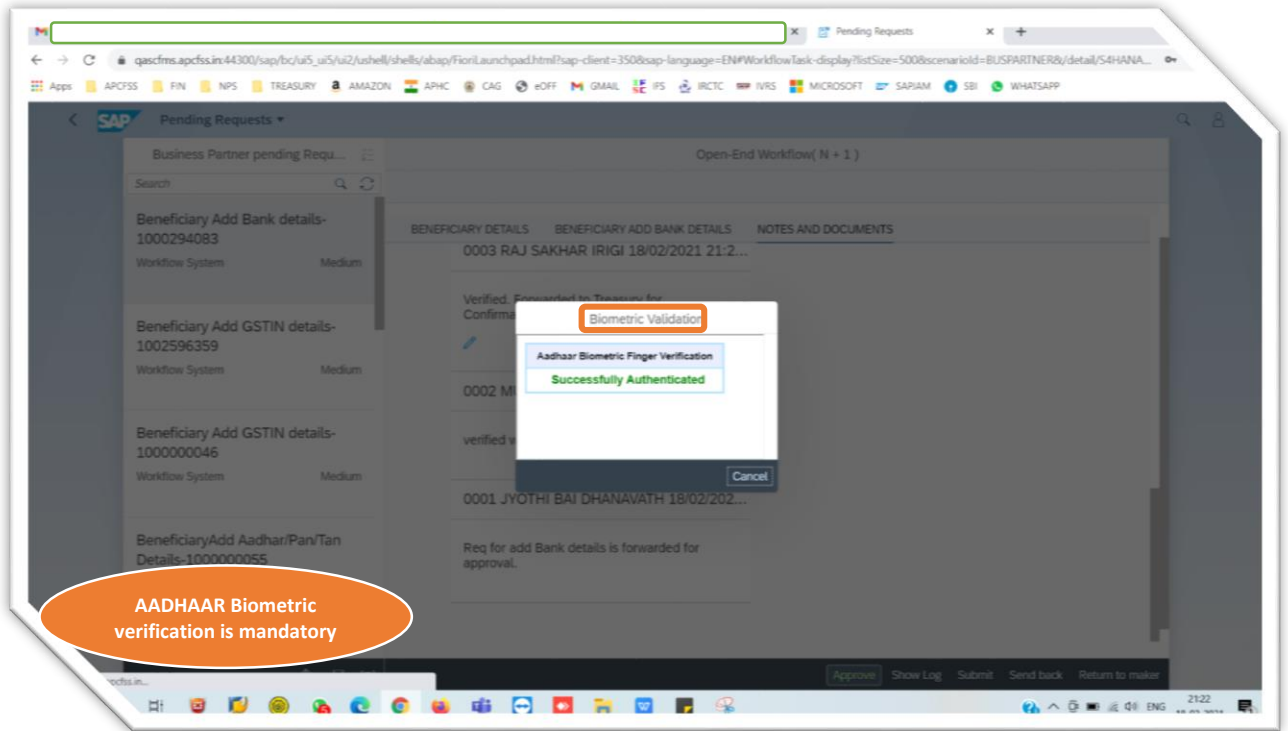
(**Snapshot.39**)
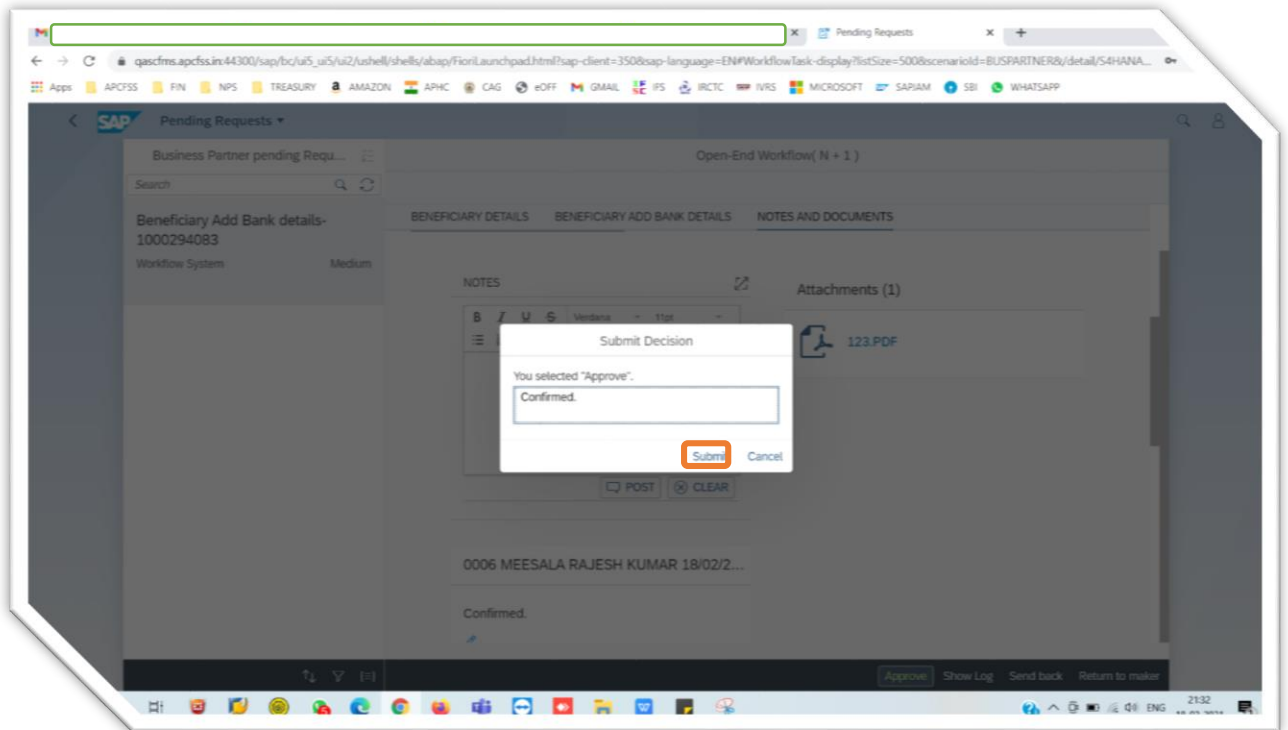
(**Snapshot.40**)
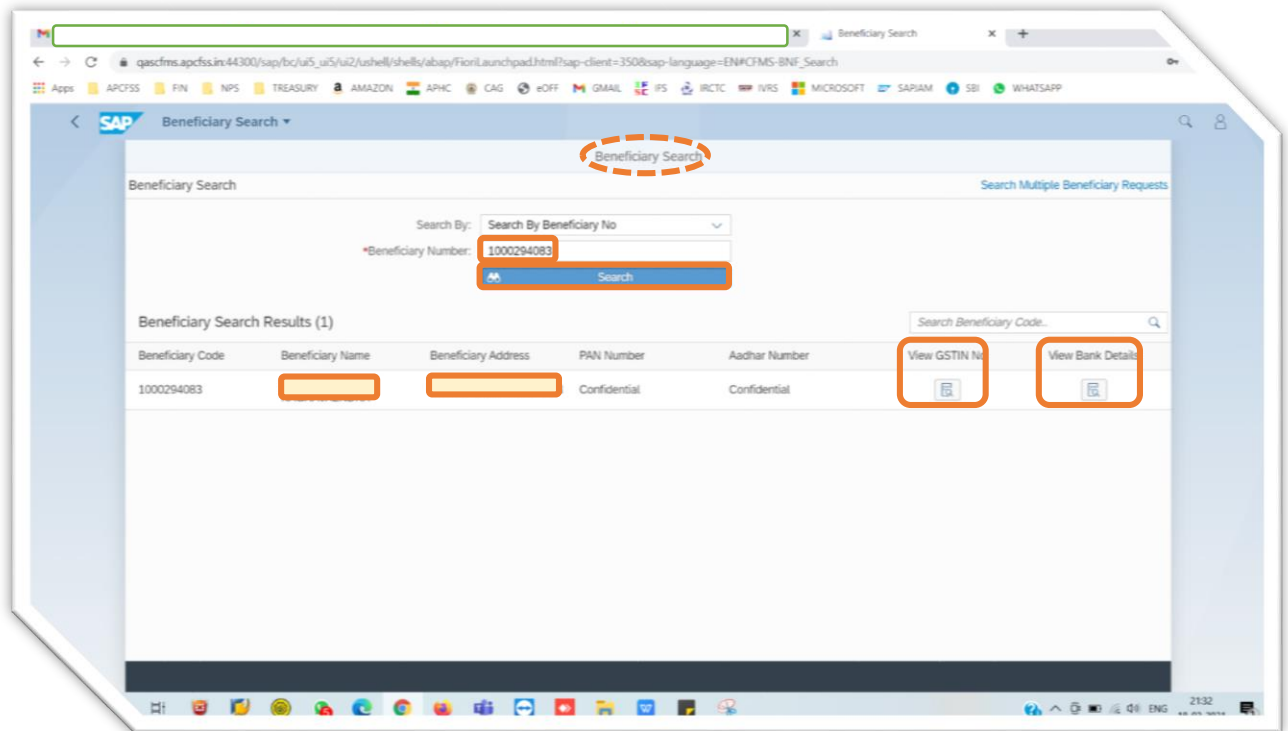
(**Snapshot.41**)
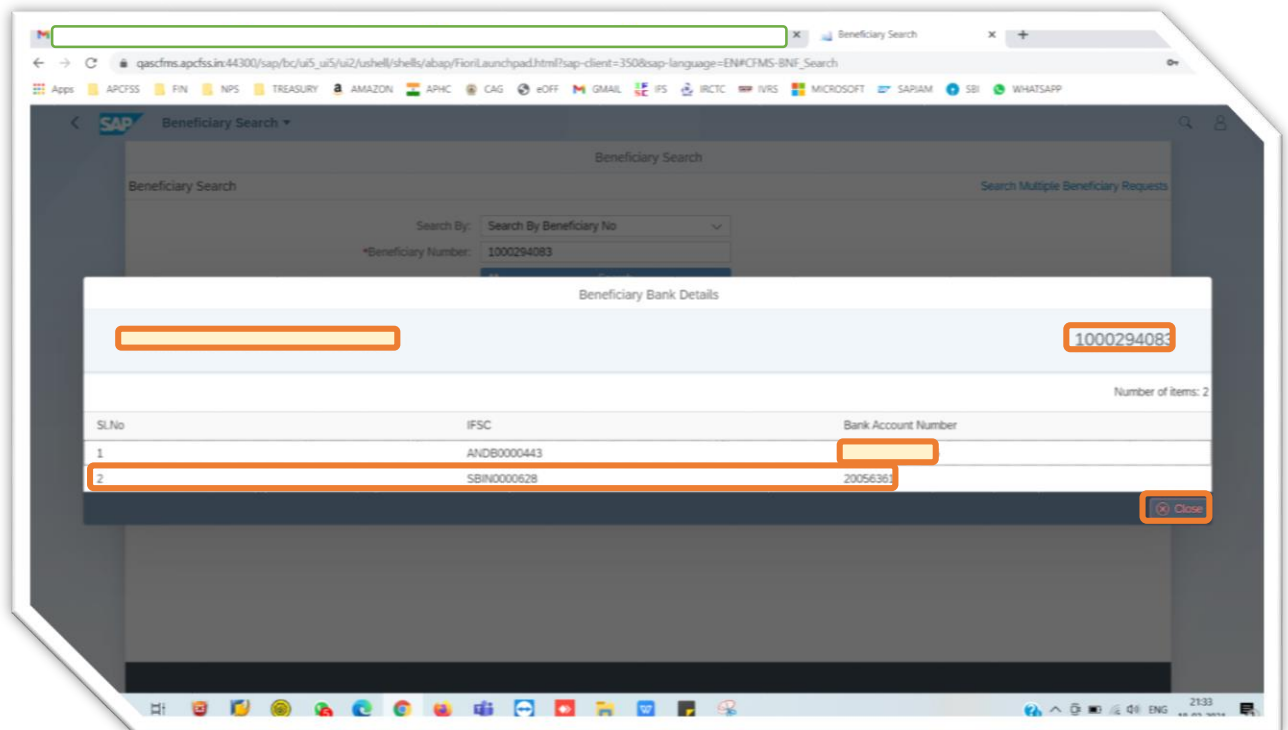
(**Snapshot.42**)

c.) **Change (Name / Bank A/c No. / GSTIN / AADHAAR / PAN / TAN) to the existing Benf**:-
DDO - Maker (Mandatory):-

(**Snapshot.43**)

(**Snapshot.44**)

(**Snapshot.45**)

(**Snapshot.46**)

(**Snapshot.47**)

(**Snapshot.48**)

Change request is not allowed, if a bill payable to the beneficiary is in process.
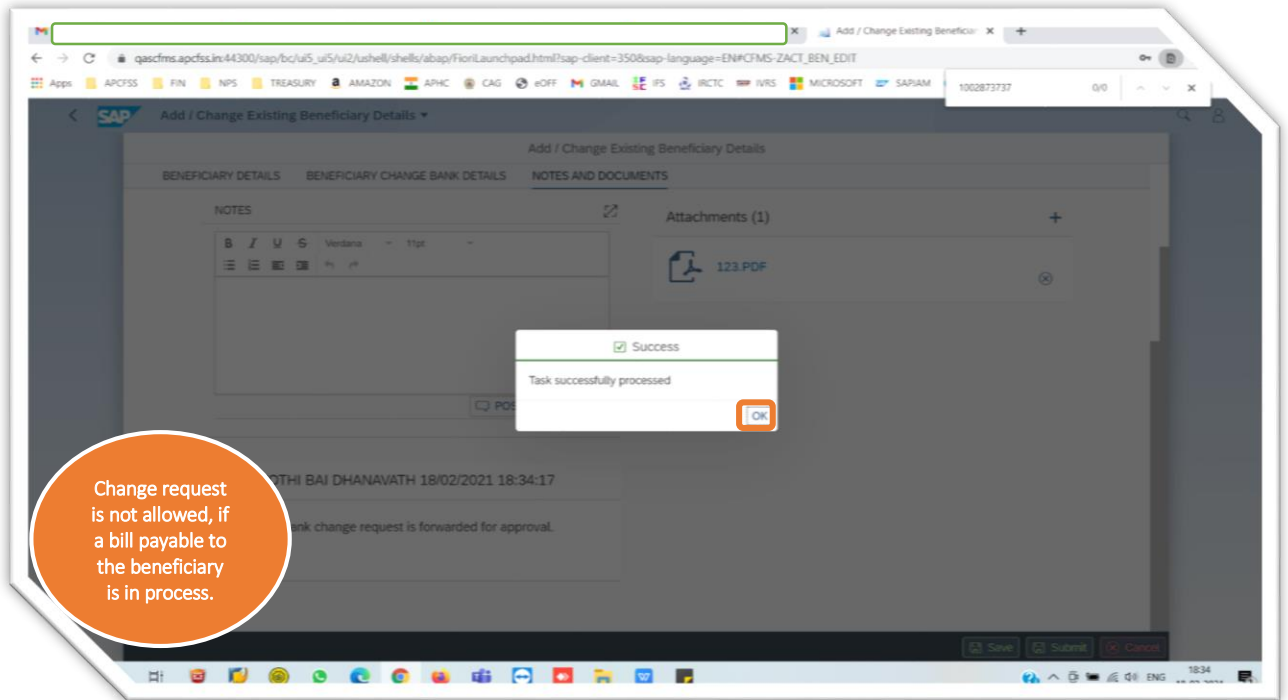
(**Snapshot.49**)

DDO - Checker (Optional):-

(**Snapshot.50**)

(**Snapshot.51**)

(**Snapshot.52**)

(**Snapshot.53**)

DDO - Submitter (Mandatory):-

(**Snapshot.54**)

(**Snapshot.55**)

(**Snapshot.56**)

(**Snapshot.57**)

(**Snapshot.58**)
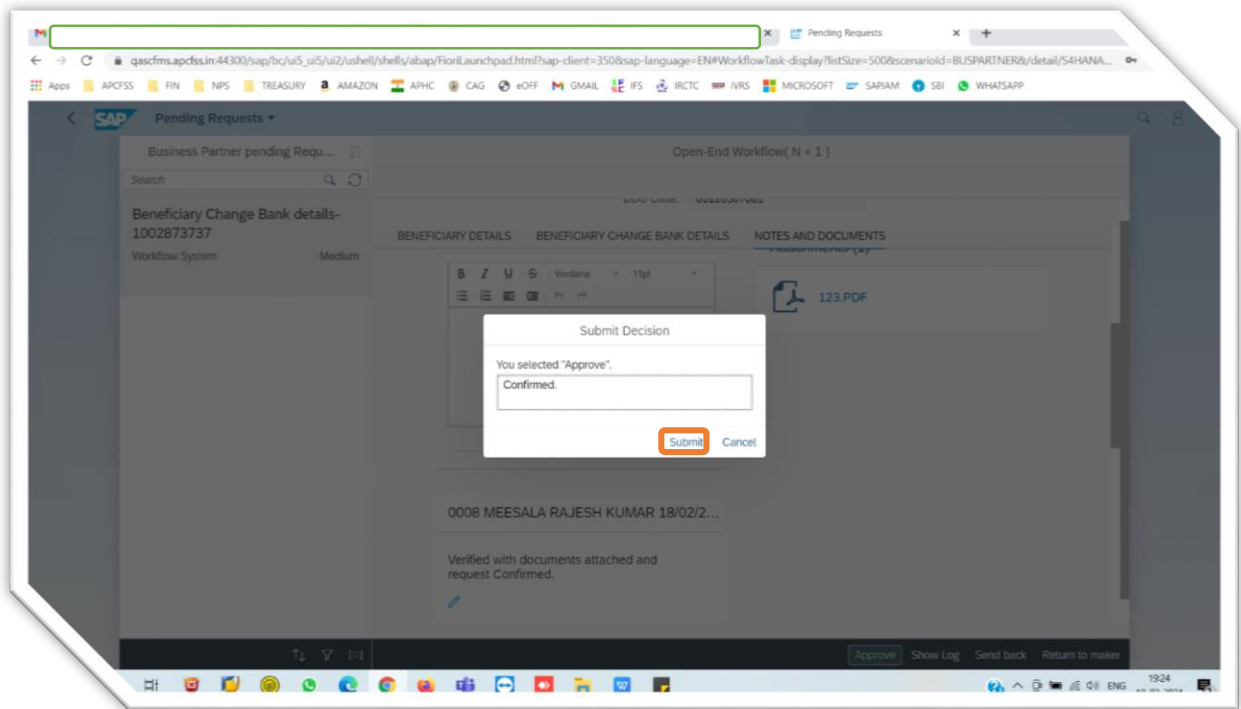
(**Snapshot.59**)

(**Snapshot.60**)

(**Snapshot.61**)