PFMS PROJECT CELL

Agency Registration User guide

2017

AGENCY REGISTRATION IN PFMS

The registration of Agencies of **Central Sector Schemes** will be done from outside as described below where funds are received directly from Central Govt.

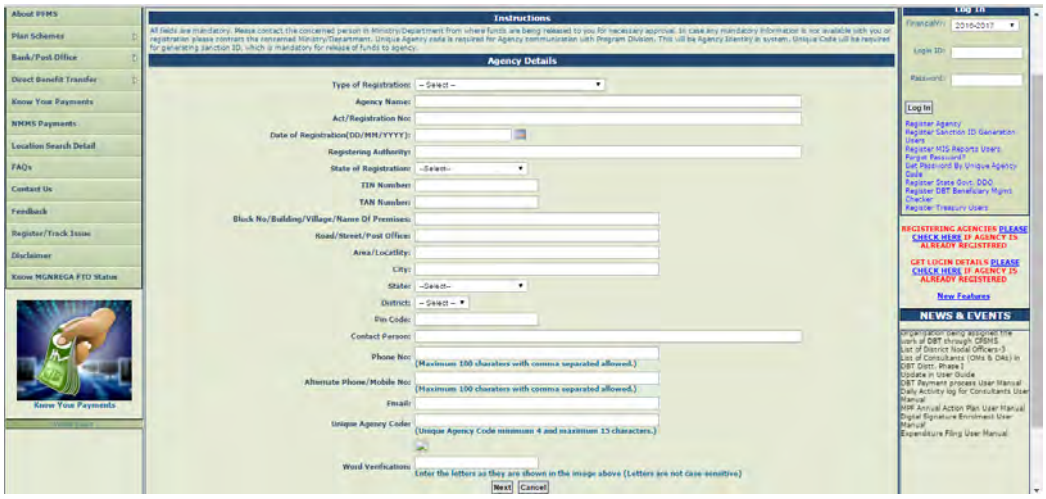
In the case of **Central Sponsored Schemes** where money is devolved through the State Treasury, the registration of the First Level Agency will be done by the State Scheme Manager from his login under linked State Scheme. (refer SPMU userguide)

All Implementing Agencies except State Governments/UTs receiving grants directly from Government of India has to register in PFMS. Rest of the child Agencies as per the fund flow hierarchy of the Scheme will be registered after logging in to the Parent Agency. For Registering a first level agency which receive fund directly from Central Government the following procedure is followed:

Open the PFMS webpage with the URL **https://pfms.nic in**.

Click on Register Agency Hyper Link on the home page given below Log in button

PFMS Registration page will open.

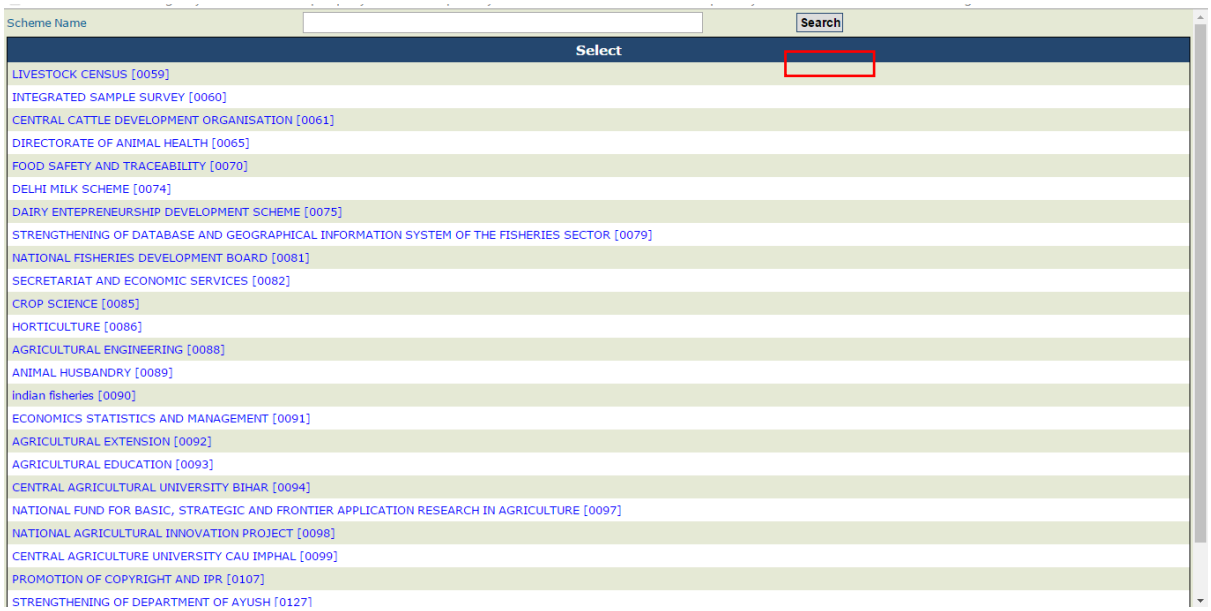


1. Select an option from the **Type of Registration** dropdown list. It is mandatory field and cannot be let blank.
2. Type **Agency Name** in the text box provided. It is a mandatory field and maximum of 100 characters.
3. Type **Registration Number** in the text box provided. Registration Number is also mandatory and can contain maximum of 100 alpha numeric characters.
4. Type **Registering Authority** in the text box provided. It is a mandatory field and can contain maximum of 256 characters.
5. Enter **TIN** number in the box provided. TIN number can contain maximum 10 characters
6. Enter **TAN** number in the box provided. TAN number can contain maximum 10 characters.(Either of Sl. Nos. 5 or 6 is required)
7. Enter complete address of the Agency. Address 1 is mandatory and it can contain maximum of 50 characters.
8. Address 2 and 3 are optional fields. Agency needs to fill these text boxes if agency's address exceeds Address 1text box.
9. Enter **City** name in the text box provided. City is a mandatory field and it can contain maximum 25 characters.
10. Select an option from the **State** drop down list. State is a mandatory field.
11. Select an option from the **District** drop down list. District is also a mandatory field.
12. Enter **Pin Code** in the text box provided. Pin Code is a mandatory field and it should contain exactly 6 characters.
13. Enter name of the **Contact Person** in the text box provided. Contact person field can contain maximum of 256 characters.
14. Enter phone number in the text box provided. Phone number is a mandatory field and it can contain maximum 20 characters. Phone number should start with Country Code (91 for India) and the STD code should be entered without 0.
15. Enter **Alternate Phone Number** in the text box provided. Alternate phone number is an optional field and it can contain maximum 20 characters.
16. Enter a valid **E mail id** in the text box provided. E mail is a mandatory field and it can contain maximum of 50 characters. Log in details of the registered agency will be sent to this e mail id only.
17. Type **Unique Agency Code** in the text box provided. Unique Agency Code is generated by the system. Agency should note down this number for further reference.
18. Type the **Word Verification** letters in the text box provided. It is a mandatory field and agency registration process cannot be completed without filling this field.
19. Click **Next** button to proceed with the registration process.

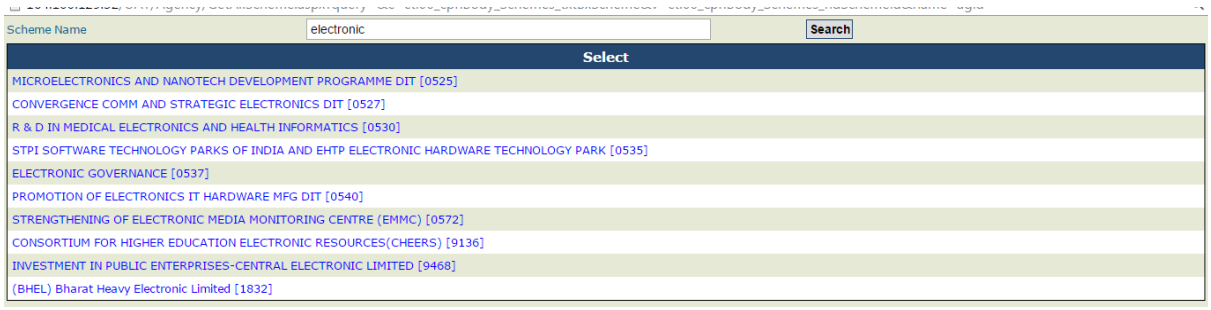
Scheme/Bank Details web page appears on the next screen

20. Type the **scheme code** in the text box for scheme or click the **Select Scheme** hyperlink. If scheme code is typed, the scheme name will appear. Select the scheme by clicking on the scheme name.

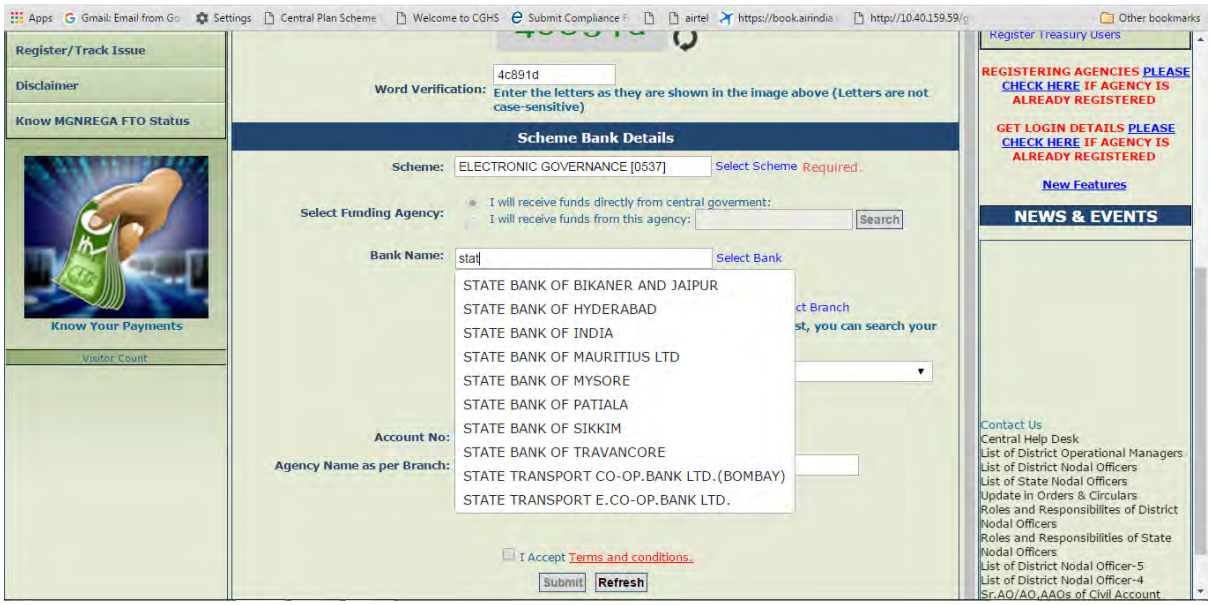
If clicked on select scheme hyperlink, the select scheme window opens on the screen



21. Type a **scheme name** in the text box provided.
22. Click the **Search** button. A list of all schemes matching the search criteria will appear below the search button.
23. Click a **scheme** to select it from the list.

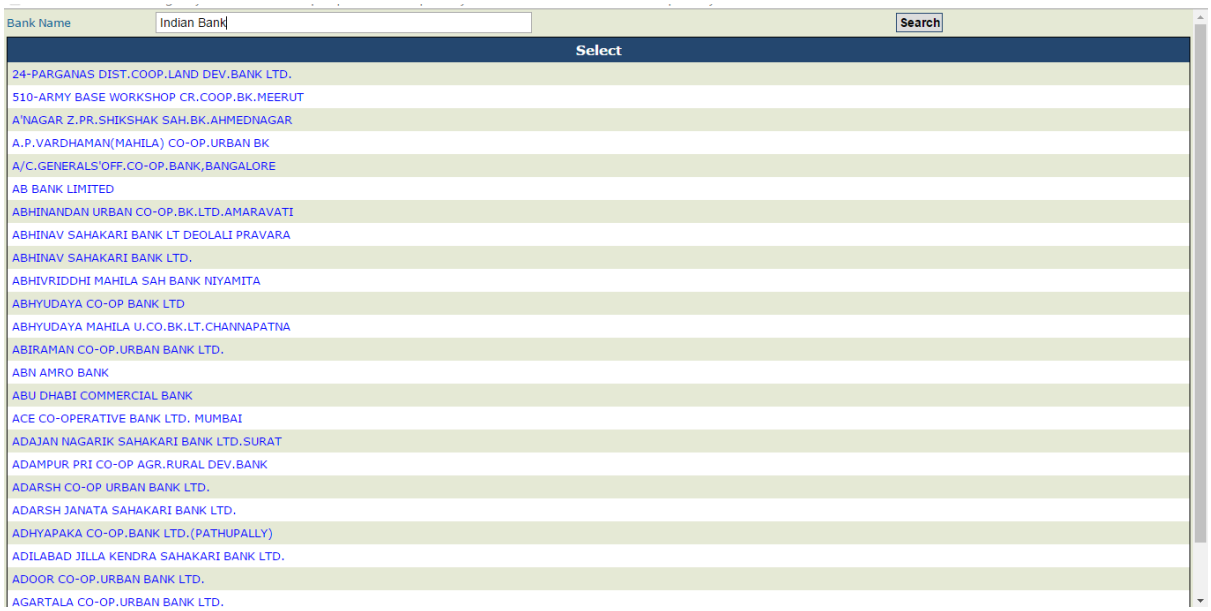


24. Funding Agency: For the first level agency that is receiving fund from Central Government, the funding agency by default will be selected as "**I will receive funds from Central Government**" option
25. Type the **first 4** letter of bank name in the text box provided or click the **Select Bank** hyper link.



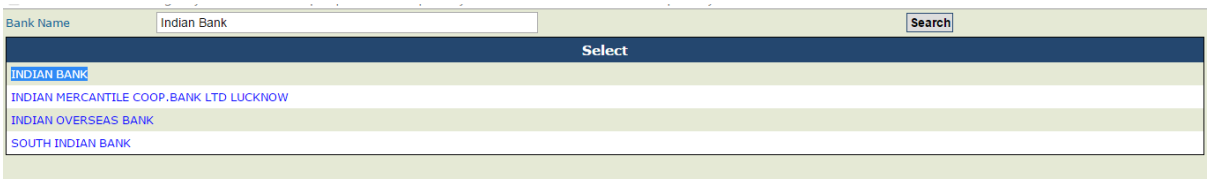
If **bank name** is typed all banks beginning with the typed letters will appear. Select the appropriate bank from the list. Alternatively, click on select bank hyper link. The following **select bank** pop up window in appear on the screen.

26. Type **Bank Name** in the text box provided.
27. Click the **Search** button.



A list of all banks matching the search criteria will appear.

28. Click a **bank** to select from the list.



29. Type **Branch Address** in the text box provided.
30. Click the **Search** Button. The branch name dropdown list gets updated.
31. Select an option from the branch name drop down list.
32. Enter **Account Number** in the text box provided. Account Number is a mandatory field.
33. Enter **Agency name as per Bank record** in the text box provided.
34. Click **Add Bank/Scheme** button.

The Scheme Bank details get added in the list.

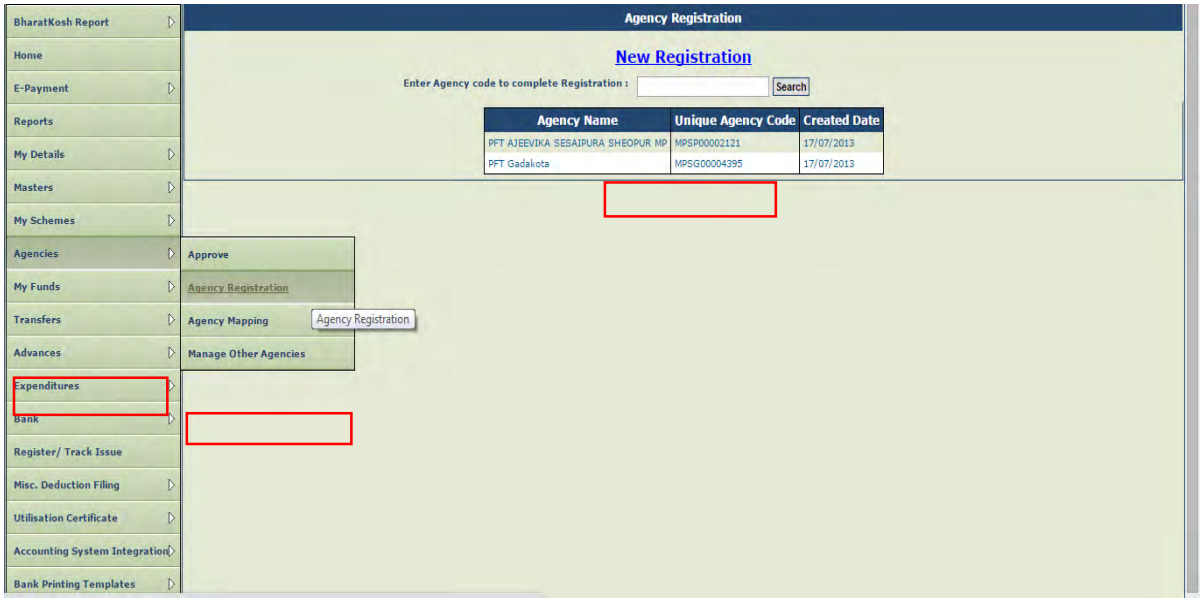
35. Select the **Accept Terms and conditions** check box.
36. Click the **Submit** button. Saved successfully message will appear on the screen. If the Agency is receiving funds for more than one scheme, more scheme - bank details can be added.

In this way the first level agency (Agencies receiving fund directly from Central Ministries) gets registered in PFMS. The registered agency needs to be approved by the Programme Division (PD) and the Principal Accounts Office of the Ministry Implementing the Scheme concerned.

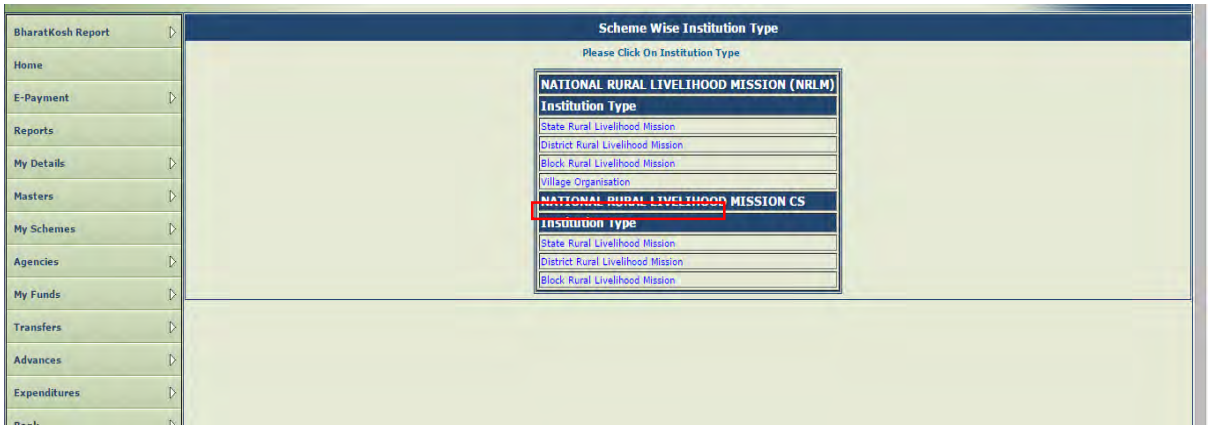
Registration of Child Level Agency.

All child level agencies will be registered after logging in to the parent Agency. Child Agencies can be at Central Agency (A Central Govt. Agency which is placed above State but below the Central Ministry), State, District, Block, Panchayat or Village level according the fund flow/implementation level hierarchy of the scheme. For registering a child agency, the funding/parent agency will log in.

1. Select **Agency Registration** under **Agency** to open the child agency registration window.



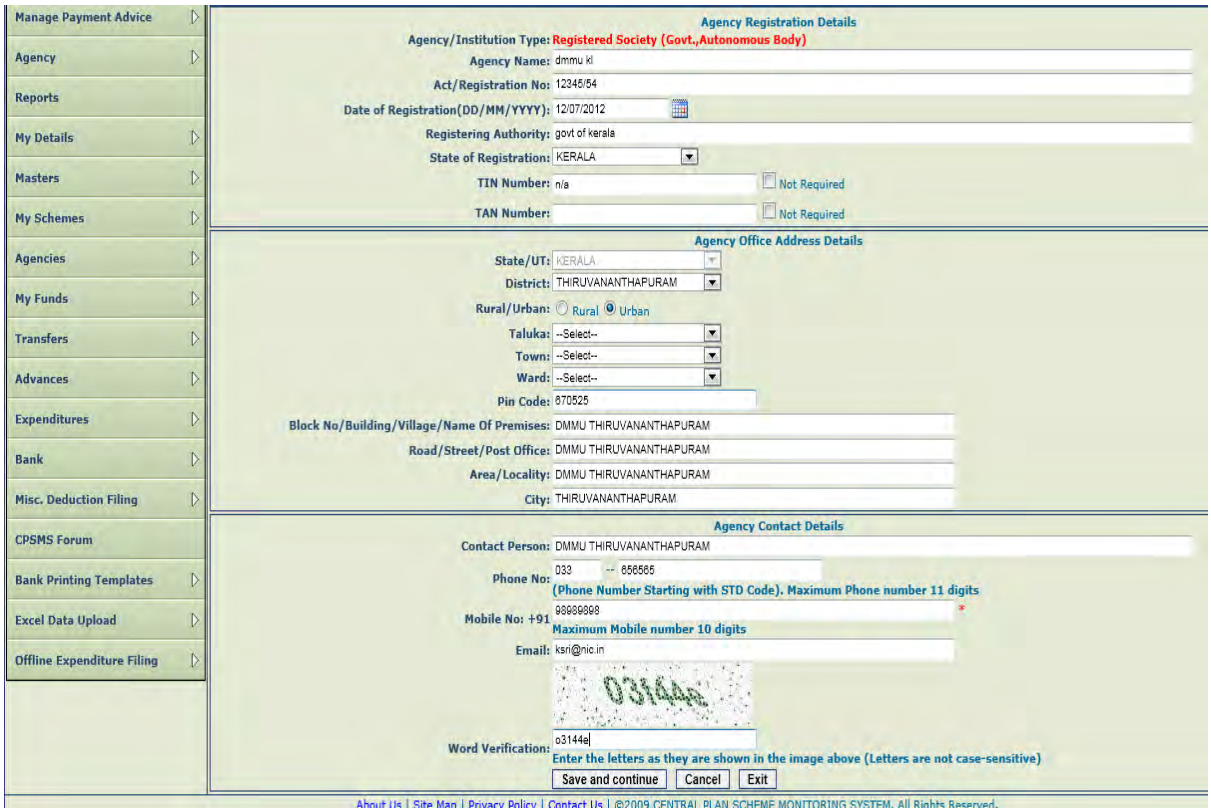
2. Click **New Registration** to open the Scheme/s – Institution types. Institution type is configured in the system and appear on selection of level of the agency to be registered.
3. Select the **hierarchy level** of the agency to be registered like District, Block or Panchayat.



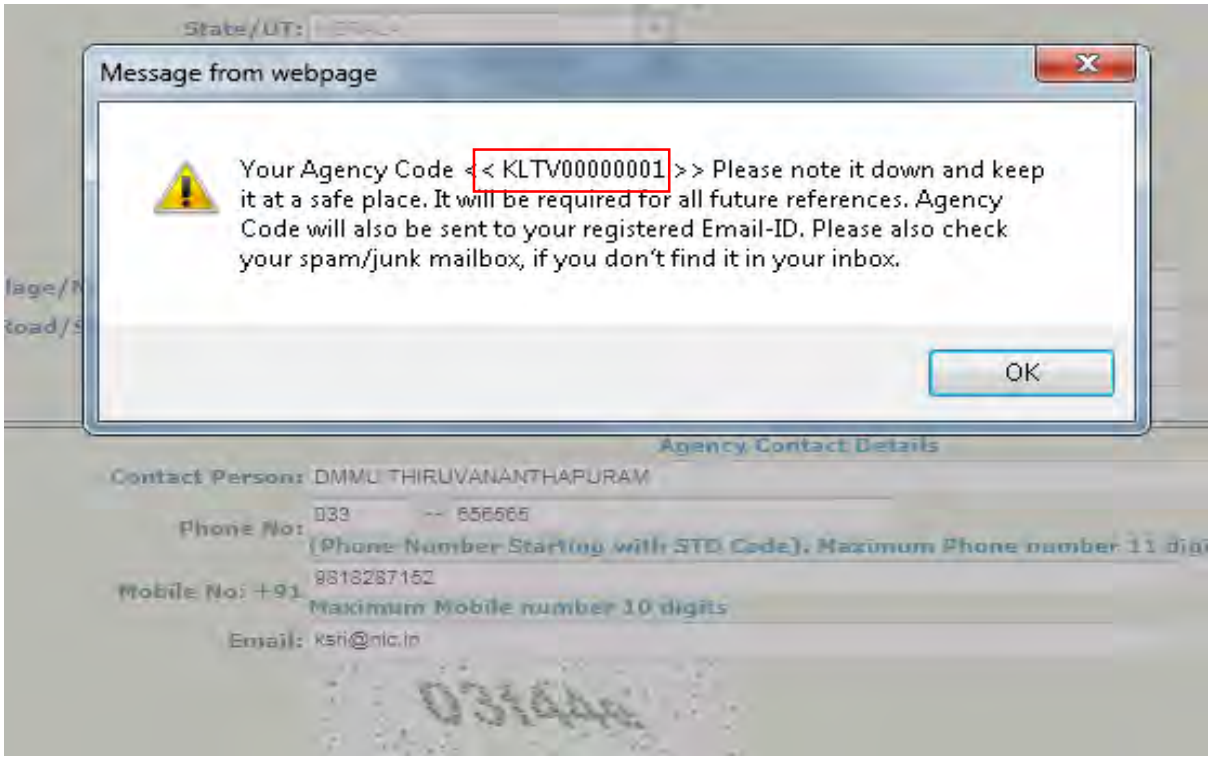
First page of the registration form will open.

4. Type **Agency Name** in the text box provided. It is a mandatory field and maximum of 100 characters.
5. Type **Registration Number** in the text box provided. Registration Number is also mandatory and can contain maximum of 100 alpha numeric characters.
6. Type **Registering Authority** in the text box provided. It is a mandatory field and can contain maximum of 256 characters.
7. Enter **TIN** number in the box provided. TIN number can contain maximum 10 characters
8. Enter **TAN** number in the box provided. TAN number can contain maximum 10 characters.(Either of Sl. Nos. 5 or 6 is required). If neither TIN or TAN is available click on the **Not Required** check box.
9. The **State** drop down list will get auto populated as the parent agency is already mapped with the State.
10. Select an option from the **District** drop down list. District is also a mandatory field.
11. Select the geographical location of the agency as Rural or Urban by clicking the Rural – Urban button. The geographical location will be displayed as **Taluka**, **Town** and **Ward** in case of Urban and **Block, Panchayat** and **Village** in case of Rural.
12. Select **Taluka/Block** from the drop down list. Taluka/Block is mandatory if the agency exist at this level.
13. Select **Town/Panchayat** from the drop down list. Town/Panchayat is mandatory if the agency exist at this level.
14. Select **Ward/Village** from the drop down list. Ward/Village is mandatory if the agency exist at this level.
15. Enter **Pin Code** in the text box provided. Pin Code is a mandatory field and it should contain exactly 6 characters.
16. Enter complete address of the Agency. Enter **Block/Building/Village** etc. at the first box. This is a mandatory field.
17. Enter **Road/Street/Post Office** in the second box
18. Enter **Area/Locality** in the third box. This is a mandatory field
19. Enter **City** name in the text box provided. City is a mandatory field and it can contain maximum 25 characters.
20. Enter name of the **Contact Person** in the text box provided. Contact person field can contain maximum of 256 characters.
21. Enter phone number in the text box provided. Phone number is a mandatory field and it can contain maximum 20 characters. Phone number should start with Country Code (91 for India) and the STD code should be entered without 0.
22. Enter **Mobile Number** in the text box provided. Mobile phone number is an optional field and it can contain maximum 20 characters.
23. Enter a valid **E mail id** in the text box provided. E mail is a mandatory field and it can contain maximum of 50 characters. Log in details of the registered agency will be sent to this e mail id only.
24. Type the **Word Verification** letters in the text box provided. It is a mandatory field and agency registration process cannot be completed without filling this field.

25. Click **Save and Continue** button to save the first page of registration process.

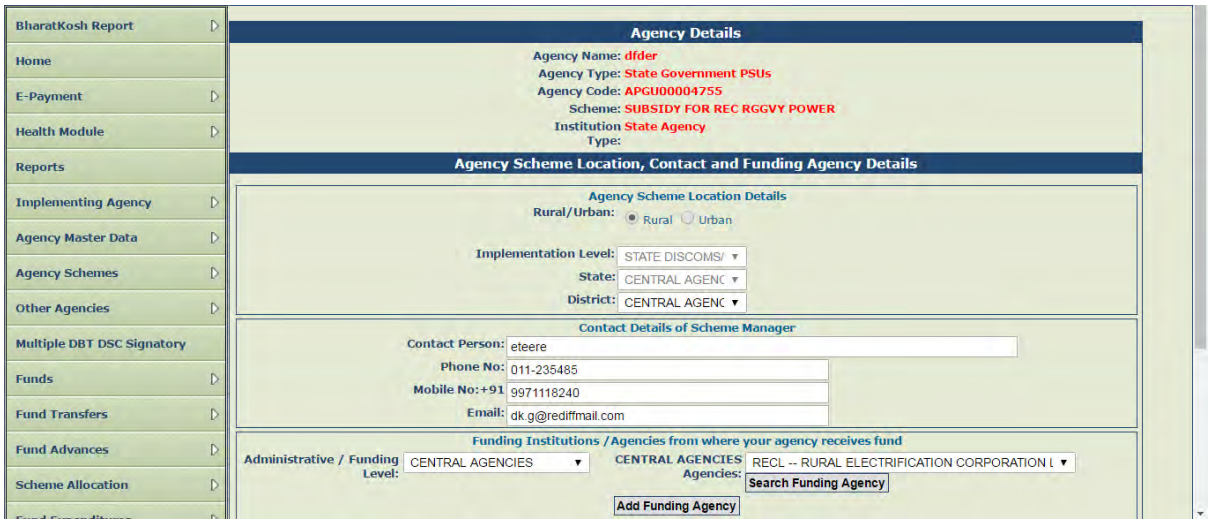


On saving the first page a Unique Registration Code generated by the system will pop up which is to be noted by the user.

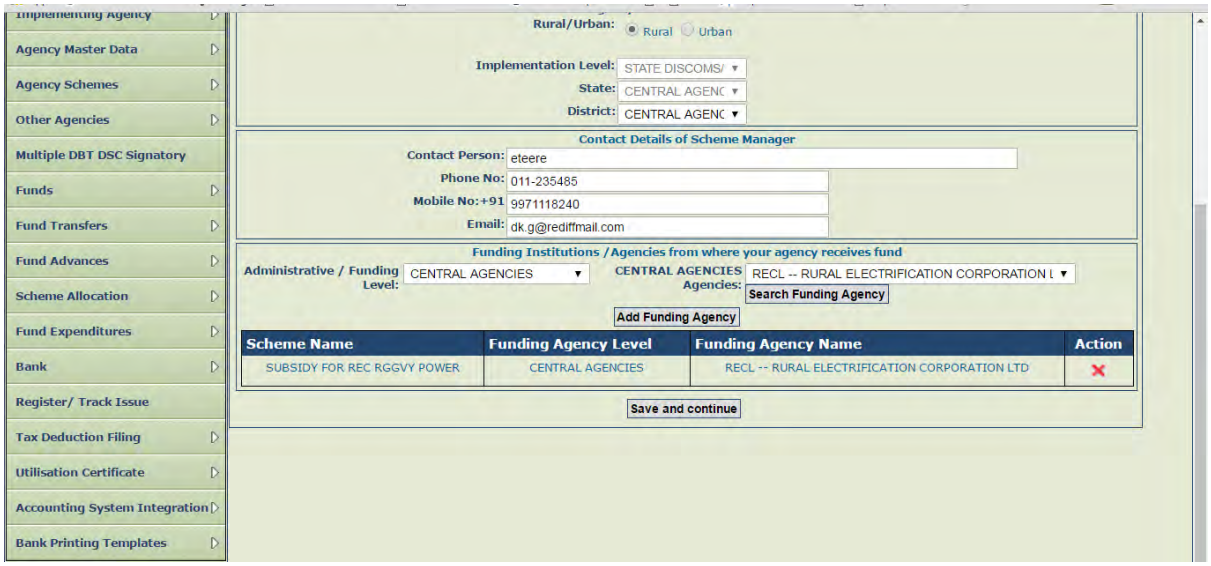


Click OK to open the second page of registration. Here the child agency has to select the funding agency to indicate the source of fund to the agency.

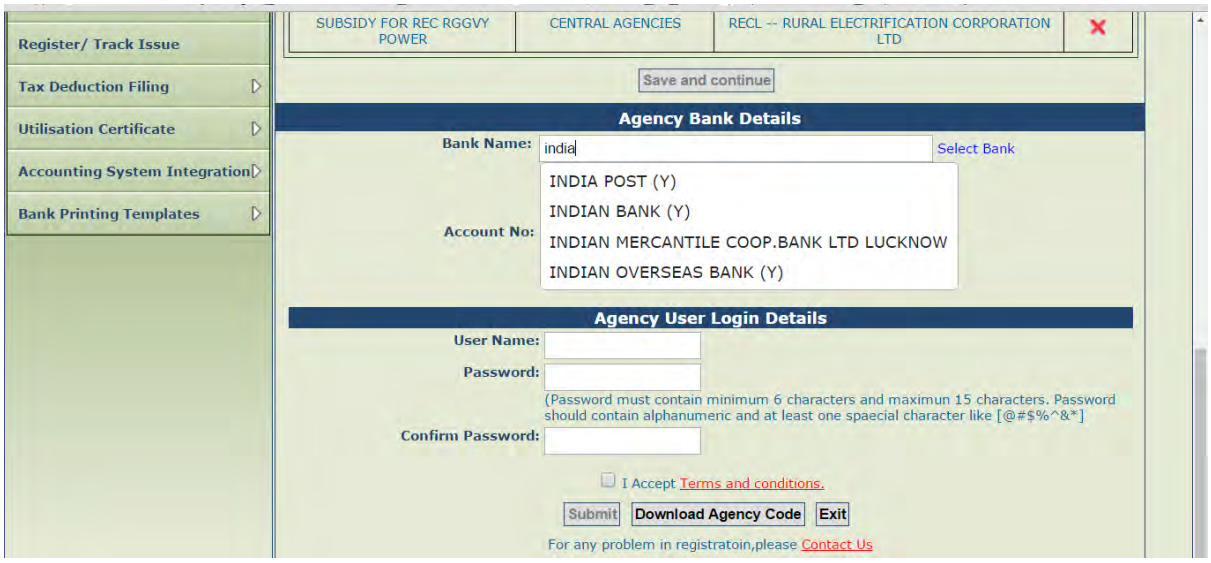
26. Select the **Administrative/Funding Agency** level as State, District, Block etc. as the case may be from the drop down list shown at the left side. All agencies registered at the level selected as per the fund flow hierarchy of the scheme will be populated in the Select Agency drop down list at the right side.
27. Select the **Funding Agency** from the drop down list.



28. Click on **Add Fund Agency** button to show the funding agency details in a grid. If the agency is receiving fund from more than one level or agency more level and agency can be added.
29. Click **Save and Continue** to proceed to the third page of registration.

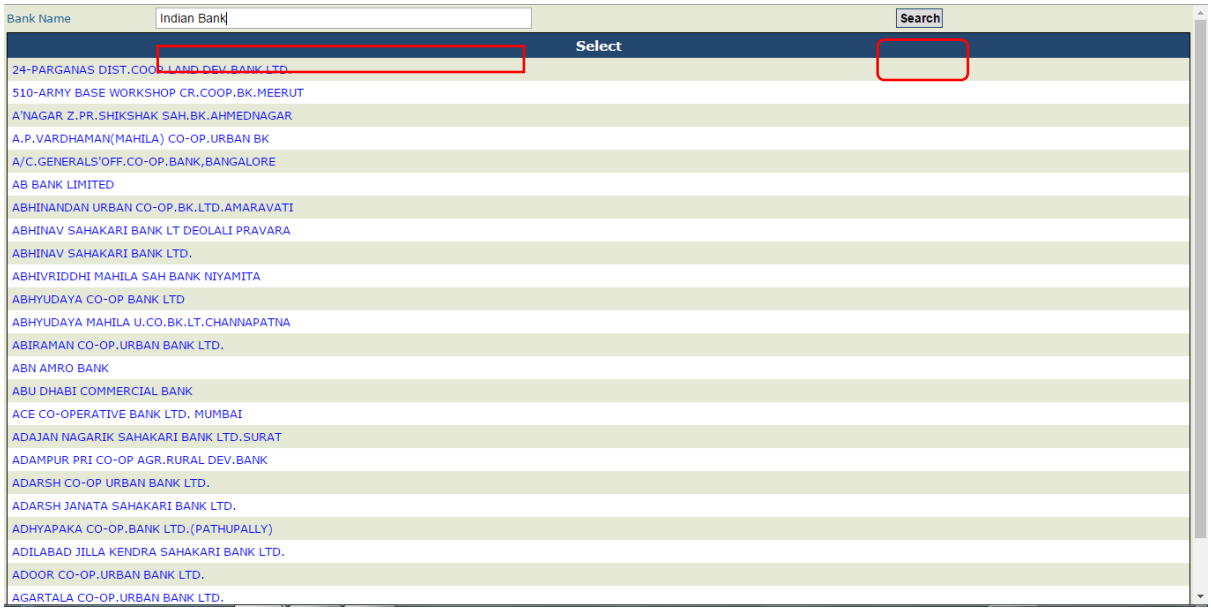


30. Type the **first 4** letter of bank name in the text box provided or click the **Select Bank** hyper link.



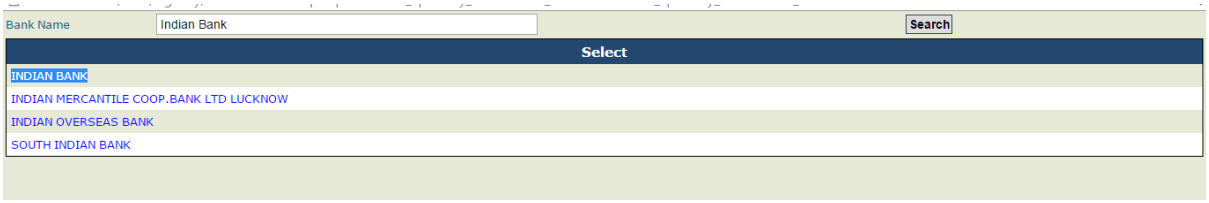
If **bank name** is typed all banks beginning with the typed letters will appear. Select the appropriate bank from the list. Alternatively, click on select bank hyper link. The following **select bank** pop up window in appear on the screen.

31. Type **Bank Name** in the text box provided.
32. Click the **Search** button.

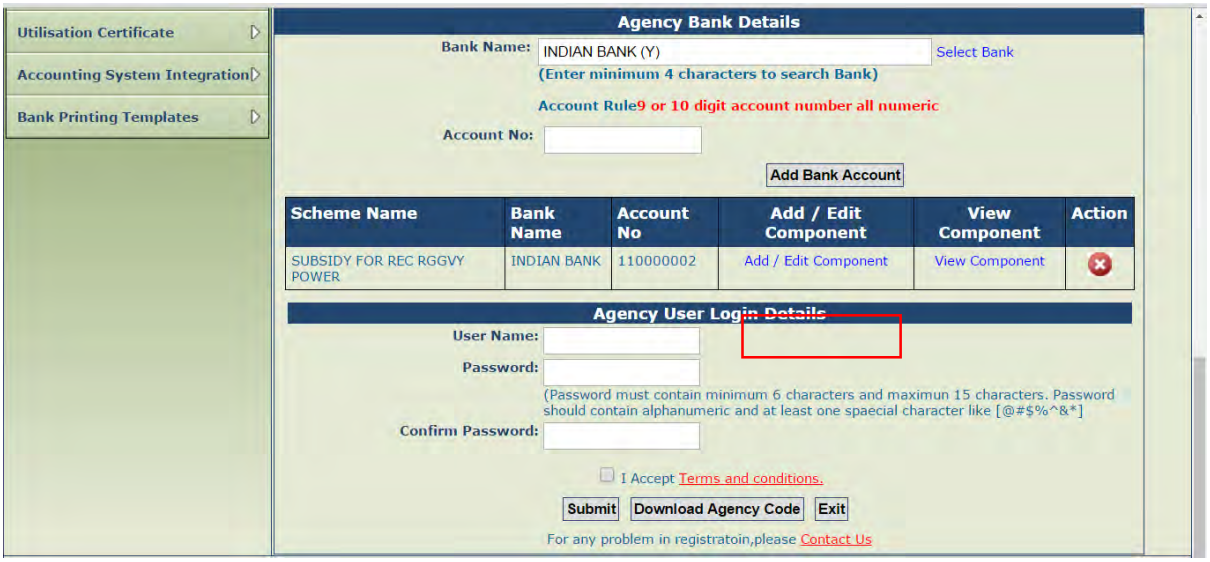


A list of all banks matching the search criteria will appear.

33. Click a **bank** to select from the list.



34. Enter **Account Number** in the text box provided. Account Number is a mandatory field.
35. Click **Add Bank Account** button.

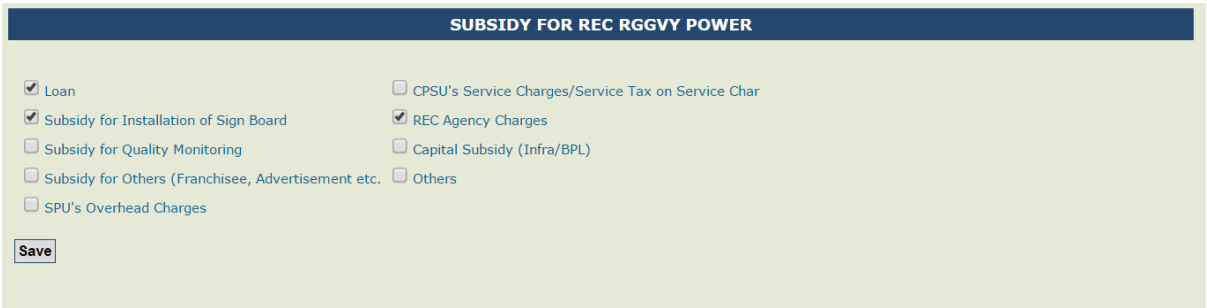


36. The Bank details get added in the page. If the Agency is receiving funds for more than one scheme, more scheme - bank details can be added.

37. Click **Add/Edit Component** hyper link.

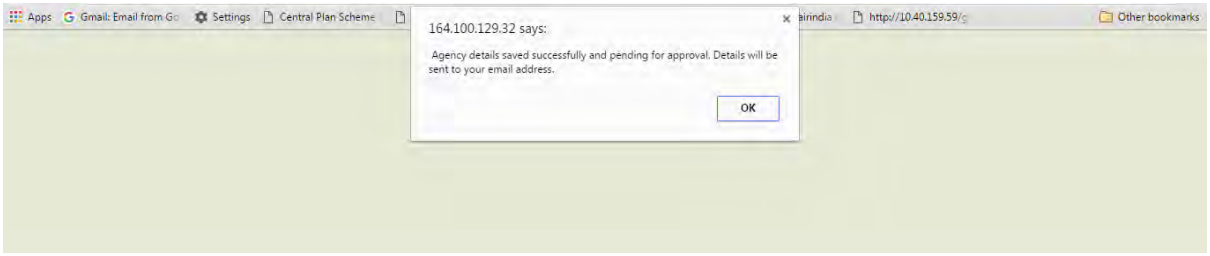
A window listing all components of the scheme will pop up. Select all or the required components to be mapped with the bank account from the component list by selecting the check box/s.

38. Click **Save** button to map the component/s with the bank account.



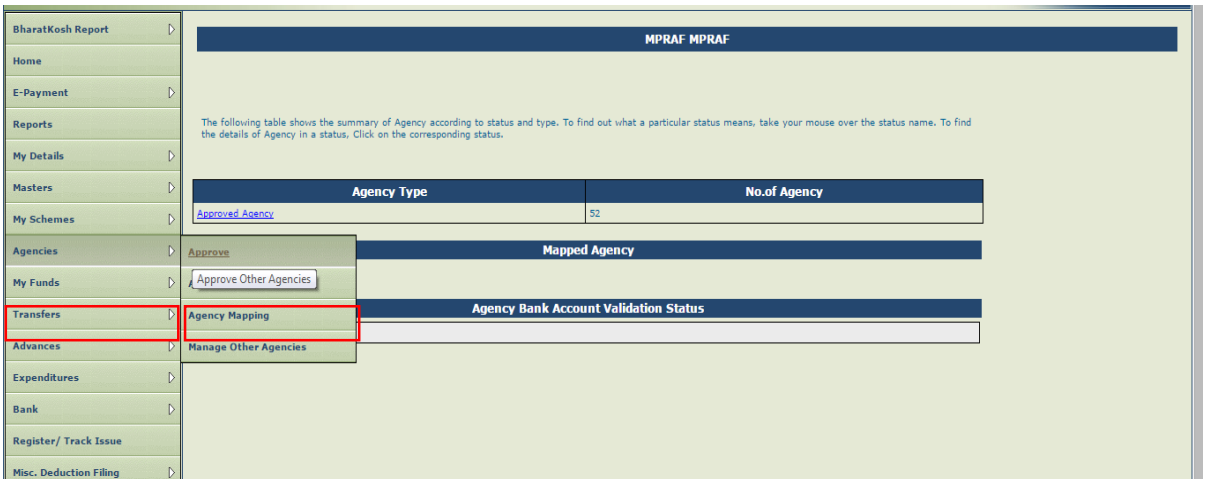
39. Give a **User name** for log in in the box provided

40. Give a **Password** for log in in the box provided. The password should contain minimum 6 characters and a maximum of 15 characters and should have alpha numeric and at least 1 special character.
41. **Confirm Password** in the box provided.
42. Select the **Accept Terms and conditions** check box.
43. Click the **Submit** button**. Agency details saved successfully and pending for approval. Details will be sent to email address** message will appear on the screen.

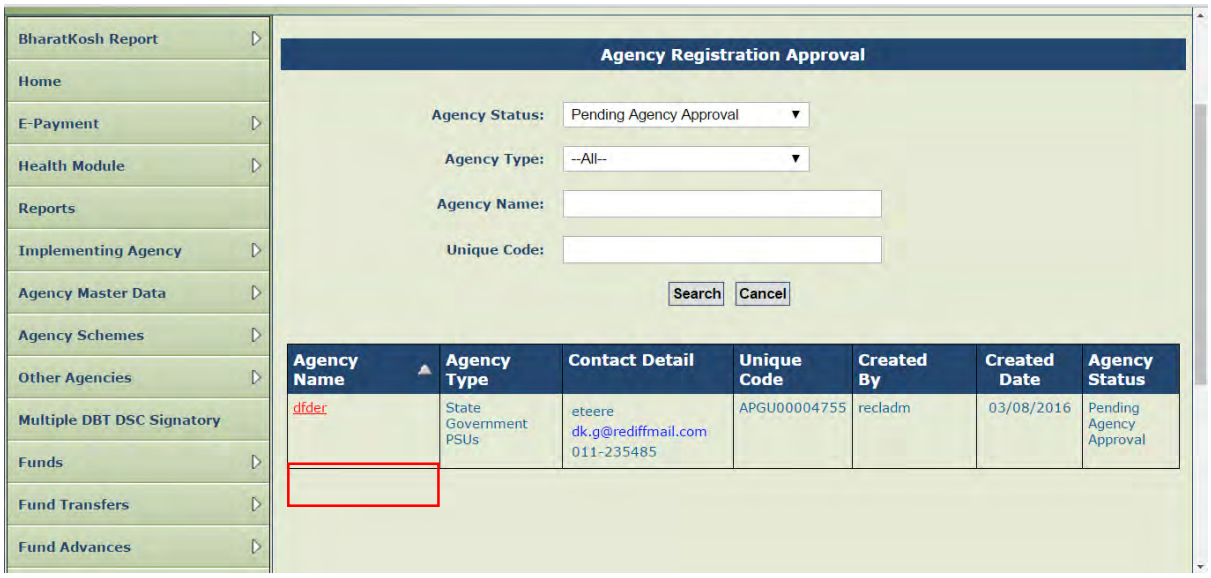


The Funding/Parent Agency will approve the child agency to complete the registration process.

44. Funding Agency will select **Approve** from under the **Agency** menu.



All agencies created by parent agency pending for approval will be listed on selecting approve option.



45. Click on the Agency Name hyper link to open the child agency registration details.
46. Verify the details and click on the check box to select scheme and bank details for approval.
47. Click **Approve** button to approve Agency. Alternatively click **Reject** button for rejecting agency.

This completes the Child Agency registration process.