

the gpaa

Department: Government Pensions Administration Agency REPUBLIC OF SOUTH AFRICA

Employer User Guide

### **PENSION CASE MANAGEMENT (PCM)**

Version 5, March 2020

## **TABLE OF CONTENTS**

	PENSION CASE MANAGEMENT (PCM) TABLE OF CONTENTS	1
1.	INTRODUCTION	3
1	INTRODUCTION	3
2.	TARGET AUDIENCE	3
3.	SUPPORT CHANNELS3.1CASE TRACKING AND CASE PROGRESS3.2PCM APPLICATION SUPPORT3.3PCM ACCESS AND ROLE SUPPORT	3 3 4
4. 5.	SYSTEM CAPABILITIES SYSTEM OPERATIONS	4 8 8
5.1	CAPTURER PROFILE - CREATE A CASE	10
5.1.1	RESIGNATION - PERSONAL DETAILS TAB	12
5.1.2	2 EMPLOYMENT DETAILS	16
5.1.3	B PAYMENT DETAILS	
5.1.4	SUPPORTING DOCUMENTS	21
5.1.5	5 EMPLOYER REPRESENTATIVE	24
5.1.6	6 SHORT MESSAGE SERVICES (SMS)	26
5.1.7 REA	THE ACCOUNT HOLDER VERIFICATION (AHV) REJECTION	26
6.	OTHER EXIT TYPES	28
6.1	RESIGNATION TRANSFER	28
6.2	RETIREMENT	38
6.3 BEN	EARLY RETIREMENT WITHOUT PENALISATION OF PENSION	50
6.3	DISCHARGE	65
6.4	DEATH IN SERVICE	75
7.	CASE ENQUIRY - CAPTURER AND VERIFIER	90
8.		92
9.	WITHDRAWING A CASE	100
10.	REASSIGNING CASE	102
11.	SUPPORT AND FREQUENTLY ASKED QUESTIONS (FAQS)	108

#### 1. INTRODUCTION

One of the main objectives of the Government Pensions Administration Agency (GPAA) with respect to embarking on the Pension Case Management (PCM) project was to improve on the effectiveness and efficiency of the electronic submission of exit documents to the GPAA by Employer Departments. The benefits of PCM include *reducing the overall time spent by the employer to channel exit cases to GPAA, reducing employer re-work of cases through system validations, thus allowing the capturing of more cases, reducing case processing time through system validations, random allocation of cases between Capturers and Verifiers which assists towards reducing the risk of fraud and improved overall productivity for Employer Departments and the GPAA.* 

The User Guide aims to provide support and process guidance to end users at all government departments and agencies that make use of the PCM application when submitting their exit applications electronically.

#### 2. TARGET AUDIENCE

All GPAA clients that intend to submit and manage their pension exit applications electronically.

#### 3. SUPPORT CHANNELS

Below is a list of the GPAA support areas and their respective support channels.

#### 3.1 CASE TRACKING AND CASE PROGRESS

The following GPAA channels are to be used for case tracking and status updates in descending order:

- PCM "Case enquiry" function
- Designated GPAA Client Liaison Officer
- PCMonline@gpaa.gov.za

#### **3.2 PCM APPLICATION SUPPORT**

- PCM notice board on PCM Home Page (system availability)
- First point of contact if the PCM system is unavailable
- PCMonline@gpaa.gov.za
- If there is no notice of system unavailability and the system is inaccessible
- If you need to change details e.g. id/passport number (substantiated proof to be attached)

 Any PCM Online system errors (e.g. page cannot be displayed, etc.) must please be reported to <u>PCMonline@gpaa.gov.za</u> (Please see the below screen)



- Any PCM Online "membership could not be matched" or "Person not Found" errors must be sent to <u>PCMonline@gpaa.gov.za</u> (Please include a screenshot of the error)
- Designated GPAA Client Liaison Officer

In the event of the above 2 channels not being available or not responding

#### 3.3 PCM ACCESS AND ROLE SUPPORT

PCMonline@gpaa.gov.za

Please ensure that the PCM system access application form(s) is/are completed and signed. Application forms can be downloaded from <a href="http://gateway.gepf.gov.za/wp-content/uploads/2016/08/BSS-31A-System-Access-appl-PCM-Portal-V2-External-users.pdf">http://gateway.gepf.gov.za/wp-content/uploads/2016/08/BSS-31A-System-Access-appl-PCM-Portal-V2-External-users.pdf</a>

 Any PCM Online password reset or new user registration requests (BSS31A forms) must be sent to <u>PCMonline@gpaa.gov.za</u>

#### 4. SYSTEM CAPABILITIES

- Open your browser of choice. You can use internet explorer 10 or 11, or the latest versions of Firefox and Chrome.
- Copy the following URL: <u>https://gateway.gepf.gov.za/pension-case-management/</u> and paste it into the address bar as shown below.



- > Press enter on your keyboard or click the go button.
- The PCM login page will now load. Should you get the 401 unauthorized page (see screenshot below), click the refresh button on your browser or press F5 on your keyboard. If you do not get the 401 unauthorized message as seen below, skip to the next step

Error 401Unauthorized
From RFC 2068 Hypertext Transfer Protocol HTTP/1.1:
10.4.2 401 Unauthorized
The request requires user authentication. The response MUST include a WWW-Authenticate repeat the request with a suitable Authorization header field (section 14.8). If the r been refused for those credentials. If the 401 response contains the same challenge as SHOULD be presented the entity that was given in the response, since that entity MAY is

> The login page should now display as follows:

GEPF your investment, your fullyre	
	Login
	Usemame
	Password
	Important Notice System Availability
	Login
	Carl Set Set Set Set Set Set Set Set

#### **Troubleshooting common connection problems**

If you have followed the previous steps and PCM still does not show the login page, follow these steps:

- Check to see if you have internet connectivity. Navigate to <u>www.google.co.za</u> and check if you land on the Google page. If not, then there is a problem with your internet. Please contact your IT administrator to diagnose the issue. If you can connect to the internet, move to the next step.
- Determine whether PCM is working. Use another machine with an internet connection and try to access PCM. If the other machine can connect, you might have a connectivity issue on your personal machine. Please contact your IT department.
- If PCM is not connecting on any other machine in your office, then test to see if you have a problem with your network. On your cell phone or any other internet device, type in the URL and connect via the device internet. If you can connect on your phone, but not on your machine, there might be a problem on your network. Contact your IT administrator to diagnose the issue.
- If you cannot connect on your phone or any machine in the office, then please send an email to PCMonline@gpaa.gov.za stating that you cannot connect to PCM. Our support personnel will raise the issue and log a ticket on your behalf. The issue will be escalated to GPAA's technical team for resolution.
- If all is in order the following screen will be shown. You will then see "Important Notice "and "System Availability" as shown in the inner box of the screen.

GEPF your investment. your future		
	Login	
	cap303	
	Password	
	Important Notice System Availability	
	Login	
		Activate Windows Go to Settings to activate Wi

> If you navigate to "Important Notice" and double click, the following screen will be shown.

Home System Availability	
GEPF your investment, your future	
Pension Case Management(PCM)	Quick Links
Welcome to Pension Case Management (PCM) Click here to go to Log-in page	Pension Case Management Online Portal
Pension Case Management is built to support latest versions of Firefox, Google Chrome and Internet Explorer 10 and 11.	
For access to PCM please fill in this form and submit to <u>PCMonline@gpaa.gov.za</u> at the Government Pensions Administration Agency and your request for access will be processed.	
A number of changes were planned to refine PCM with the objective to prevent errors to come through to GEPF.	
<ol> <li>End-to-end PCM enquiry was deployed to Production. Click here for more information.</li> <li>Click here to see Address changes.</li> </ol>	Activate Windows Go to Settings to activate

# When you scroll down You can drill down by placing cursor on any subject (1 – 6) to view changes.



If you navigate and click on "System Availability" on the inner box of the login screen, the screen below will be shown.

	your investment, your future				
System	Availability				
Show 10 🔻 e	ntries	Search:			
Date 💠	Availability ÷	÷			
2020/03/14 - 2020/03/15	Not available – 13th of March Friday from 17:00 till the 16th of March Monday 06:00 Please take note that the PRE environment will be available with the latest Production data, to allow any queries to be attended to at the Pretoria, Gauteng, National Dep. Road Show	Monthly Payment Run/Pension Increases for GEPF 96 Fund			
2020/03/21 - 2020/03/22	Available				
2020/03/28 - 2020/03/29	Not available – 27th of March Friday from 17:00 till the 28th of March Saturday 09:00 Available – 28th of March Saturday from 09:00 – Sat 17:00 Available – 29th of March Sunday from 09:00 – Sun 17:00	Recon Run Activate Windo Go to Settings to act			

#### 5. SYSTEM OPERATIONS

#### > LOGIN

Open browser and navigate to https://gateway.gepf.gov.za/pension-case-management/

The page below should be displayed

GEPF your investment, your future		
	Login	
	Дjsername	
	Password	
	Important Notice System Availability	
	Login	

Insert username that was allocated to you by GPAA and your password in the respective fields on the screen

GEPF your levestment, your future		
	Login	
	cap001	
	•••••	
	Important Notice System Availability	
121 121 1	Lggin	

After inserting the username and password, click the Login button. If the username and password is incorrect or has not been granted access, the screen below will appear. Before contacting <u>PCMonline@gpaa.gov.za</u> for support, please re-check and retry username and password

Would you like Firefox to remember this login?			
cap001 future			
Show password			
E Such berrucht			
<u>R</u> emember <b>~</b>			
	Leafer a		
	Login 🗟		
	Invalid username and	password!	
	Username		
	Password		
	Important Notice	System Availability	
		ogin	
		login	

- If username and password is correct and you have access, the following screen should appear.
- You will see on the upper right-hand corner of the screen, your name, as given in your access form and captured by GPAA.

GEI your investment, y	<b>PF</b> rour future		CAP
ASE MANAGEMENT	Total pending cases for role:		
a Inbox	CAPTURE	+1	
Create Case	Total pending cases for user:		
Case Enquiry	CAP302	:0	
Case Enquiry	CAP302 Request Case	:0	

> When you click on the name, you will see a drop down menu as shown below.

GEF	<b>PF</b>		CAP302 CAP3
your investment, yo	iur future		My Profile
			Logout
CASE MANAGEMENT	Total pending cases for role:		
⊜ Inbox	CAPTURE	- 11	
Q Create Case	Total pending cases for user:		
🌋 Case Enquiry	CAP302	:0	
	Request Case		

When you click on "My Profile" you will see your details as captured by the GPAA. When you click on "Logout", the open session will end.



#### 5.1 CAPTURER PROFILE - CREATE A CASE

> The Capturer must use the "Create Case" function on the left-hand side of the page to create the case, as shown below.

CASE MANAGEMENT	TYPE OF EXIT
⊆ Inbox	
Q Create Case	
Case Enquiry	
	SERVICE TERMINATION DATE
	YYYY-MM-DD

- After selecting "Create Case", go to "Type of Exit". The drop-down menu to select the relevant exit option e.g. Retirement, Resignation, Discharge or Death in Service must be accessed.
- Choose the applicable exit type option
- The selection will then allow you to access and enter the applicable termination date under the "Service Termination Date" field, either by typing in the date or selecting it from the date widget as shown below.

your investment, you	F ar tuture									P Mph
CASE MANAGEMENT	TYP	E OF	EXI	r						
Q Create Case	RE	SIGN	ATIO	N			~			
5 Case Enquiry	SEF	VICE	E TEF	RMIN	ATIO	N D	ATE			
	<	[		Januai	ry 2017	·		>	$\mathbb{R}$	
	52	Mon	Tue	Wed	Thu	Fri	Sat	Sun		
	53	02	03	04	05	06	07	08		
	54	09	10	11	12	13	14	15		
	55	16	17	18	19	20	21	22		

You will then see the "Search" criteria as displayed below: "ID Number", "Passport Number", "Member Number", "Employee Number", and "Personal Details".

e Enquiry	SERVICE TERMINATION DATE
asign Cases late Case	2017-01-31 × 🗃
	SEARCH
	ID Number Passport Number Member Number Employee Number Personal Details
	ID Number Submit

- You may select any option within the "Search" criteria e.g. "Member Number", then insert the member number of the exiting official and click the "Submit" button to proceed.
- > The screen below will be shown.

	ID Number	Passport I	Number Me	ember N	umber	Employee Number	Persona	l Details		
	Mem	ber Number	9615929 Submit	4			]			
	Results									
	ID Number	Passport Number	Member Number	Title	Initials	Name & Surname	Gender	Start Date	Termination Date	
	7712180136080		96159294	MR	MA	MANYONYOBA APPLE VENTER		1996- 05-01	2017-01-31	SELEG
San Sant Sugar										

- > Click on the "SELECT" button to open and view the detailed case information.
- See screen below.
- You will notice that there are tabs (headings) on the screen. e.g. "Personal Details", "Employment Details", "Payment Details", Supporting Documentation" and "Employer Representative".
- Take note that the type of exit chosen will determine the amount of tabs to be displayed and completed e.g. Retirement, Discharge, and Death will have additional tabs to be completed.

#### 5.1.1 RESIGNATION - PERSONAL DETAILS TAB

CASE MANAGEMENT	Personal Details	Employm Details	ent Payment Details	Supporting Documents	Employer Representative
Q Create Case	The (*) refers to a mandat	tory/required fi	ield.	Pe	ension Number:
	Persal Number *		Current Pension Number *	Pre-amalgama	stion Number
IN-PROGRESS	Title *		Initials *	Last Name(Su	rname) *
» <b></b>	First Name(s) *		MA Gender*		
	MANYONYOBA APPLE		ID number	Passport Num	ber
	Date Of Birth *		Marital Status *	Is there a divo	rce court order issued?
w.u. m.	19/7-12-18	1416 1			~ 

First Name(s) *	Gender * Required	
MANYONYOBA APPLE	- Please Select	K≱
Maiden Name	ID number	Passport Number
Date Of Birth *	Marital Status *	Is there a divorce court order issued?
1977-12-18	MARRIED	No  Ves
Income Tax No*	Home Number	Cell Number*
0836003400	123190000	082000000
Email Address		
Email Address		
Residential Address		
Street Name *	Street Number	City *
34 HAMILTON STREET		PRETORIA

- > Complete the personal details tab as per id/passport information.
- If the personal details displayed on the screen (id/passport/dob) differs from the id/passport, send an e-mail to <u>PCMonline@gpaa.gov.za</u> with the relevant proof of change as the "locked" fields (greyed out fields) cannot be accessed/amended by you.
- > All fields that are marked with the red asterix (\***Required**) are compulsory.

Income Tax No*	Home Number	Cell Number *
0785217647	Home Number	0724343356
Email Address		
stefangrobbelaar66@gmail.cor	n	
Residential Address		
Street Name * Required	Street Number	City *
Address 1		PRETORIA
Suburb Q	Complex Name	Complex Number
PRETORIA		
Province/State * Required	Postcode * Q	Country *
Please Select	▼ 0002	Please Select
Is the Postal Address same as Address?	the Residential No 🖲 Ye	•5 •
Postal Address		
P.O Box * Required	Suburb Q	City *
P.O Box	GLEN	GLEN Activate Windo Go to Settings to ac

- > Add street name and number on the street name and number field as shown above.
- > Search for the suburb by clicking on suburb search field as shown above.
- > The suburb will be populated by the system.

	Income Tax No*	Home Number	Cell Number *	
Addres	ss Details search by Suburb			
	en	nter the first 4 letters to activate searc	<u>h</u>	
		Postal Address Details *		
Ple	ase Select		•	
			Continue	
111	7	· · · · · · · · · · · · · · · · · · ·		
	Please Select	Postal Code	Please Select	T
	Is the Postal Address same as t Address?	he Residential No 🖲 Yes	s O	
	Postal Address		General Announcements	
	P.O. Poy & Pequired	Suburb	Bereavement	
			that we at hourse the plassific	eatsat §jof M
	P.O BOX	GLEN	Ingrid Masemotalsonotherion	atsun/d
	Province/State * Required	Postcode * Q	Country "	

- > Pop up screen will be displayed as shown above
- > Add address details search by suburb then click continue.
- > On postal, address details dropdown menu, select the postal code from the dropdown list

	Income Tax No*	Home Number	Cell Number *
Address	Details search by Suburb		
	ente	er the first 4 letters to activate search	
Pretoria	l	Search	
		Postal Address Details *	
0002 -	PRETORIA - PRETORIA - 1		•
			Continue
	Please Select	Postal Code	Please Select •
	is the Postal Address same as th Address?	e Residential No 🖲 Yes 🖯	
	Postal Address		
	P.O Box * Required	Suburb Q	City *
	P.O Box	GLEN	GLEN GLEN Go to Settings to activate W
11/1/	Province/State * Required	Postcode * Q	Country *

- Click continue as shown above
- > Once suburb is selected, City will be added by the system

Street Name *	Street Number	City *
42 ILANGA PLACE	KLIPPAN STRAAT	MONTANA
Suburb Q	Complex Name	Complex Number
KLIPPAN STRAAT	MONTANA	
Province/State * Required	Postcode * Q	Country *
Please Select	• 0186	South Africa
Free State KwaZulu Natal Mpumalanga North West Northern Cape Limpopo Western Cape	Suburb Q SA POLISIE	City • P SAK X131
Province/State * Required	Postcode * Q	Country *
Please Select	• 0001	South Africa
Personal Details Notes:		Activate Windows Go to Settings to activate

- Select Province from Province/State dropdown menu as shown above
- > For the postal address do the same.
- After all the information is completed in the fields of the "Personal Details" tab, click on the "Start Application (green) button" at the bottom right hand side of the screen to proceed or alternatively click on the "Cancel" button on the bottom left hand side of the screen if you wish not to continue with the application.
- > You will not be allowed to access the "Start Application" button if you have not completed the fields on the screen. If this occurs, recheck to see if all information has been completed.
- If you still cannot access the "Start Application" button, send an e-mail of the screenshot to PCM online.
- By clicking on the "Start Application" button, you will now start/activate this case and proceed on to the "Employment Details" screen.
- A case reference number will now appear above the tabs. See screen below

#### 5.1.2 EMPLOYMENT DETAILS

> Amend employment details if required.

CASE MANAGEMENT	Z102 form details for		WT20						
e Inbox	Personal Details	Employment Details		Payment Details	S	uppo ocum	rting ients	Em Repres	ployer sentative
Create Case	The (*) refers to a mand	atory/required field	ł.				Pe	ension Numb	er:
	Employer Code *		Code * Employer Name *			Occup			
	000055		SOUTH A	FRICAN POLICE SERVI	CE		SAPS		
IN-PROGRESS			0				0		
	Common comont data:		*				Service Termina	tion Date *	
	Period covered by pension contributions		1979-12-2	21	m		2017-02-28		<b>iii</b>
			0				0		
			*						
	(As per service conditions)		60		٣				
			0						

- When you scroll down the "Employment Details" screen, the annual pensionable salary scale details will be reflected.
- > The last 3-year salary scales are required to be completed.
- Use only rands (R) for the salary scales. No cents are to be used. Round off to the nearest rand value.
- Bought service, The Z102 will be populated with what is on GPAA systems. The employer Capturer will not be allowed to capture Purchase of Service period.
- Break in Service, the employer can only capture the period over 120 days.

Period From*		Period To*		Annual Salary *	_
2016-04-01	<b>iii</b>	2017-02-28	<b>m</b>	373611	+ •
Period From*		Period To*		Annual Salary *	
2015-07-01	1	2016-03-31	<b>iii</b>	347223	+ -
Period From*		Period To*		Annual Salary *	
2015-04-01	i	2015-06-30	<b>m</b>	333861	+ -
Period From*		Period To*		Annual Salary *	
2014-04-01	<b>iii</b>	2015-03-31	<b>iii</b>	312021	+ -
Add Item(s)					
Bought service perio	d to be recognised				
Add Item(s)					
Add Item(a)					

- Next, click on the "Get Rules" button.
- > Then proceed to the "Reason for Termination" field.

		Ľ		
Break in service period to be disregarded				
Add Item(s)				
Reason For Termination * Required				
- Please Select			~	Get Ingles
Age at Exit				<u> </u>
0	0			
Pensionable Years				
0				
xit Rule				
xit Sub-Rule				
otal Debt(Department liability)		Debt Dispute 🗆 []		

> Click on the "Open/Drop down" button to select the reason for termination from the list.

Select the correct reason from the listed items e.g. Resignation: Own Account as shown below.

Break in service period to be disregarded	
Steam and point is an analysis and	
Add hell(s)	
Reason For Termination * Required	
- Please Select	 Get Rules
Resignation: Own Account	
Resignation: Transfer	
Pensionable Years	
0	
Exit Rule	
Exit Sub-Rule	

The following screen with "Age at Exit", "Pensionable Years", "Exit Rule" and "Total Debt" will be shown.

Add Item(s)				
Reason For Termination *				
Resignation: Own Account			~	Get Rules
Age at Exit				
39	D			
Pensionable Years				
37		0		
Exit Rule		•		
14.4.1				
Exit Sub-Rule				
14.4.1(a)				

- > Select the "Proceed" button to continue or
- Select the "Back" (black button) on the left side at the bottom of the page to go bac

	1		
Exit Sul	b-Rule		
14.4.	1(a)		
Total D	abt(Department liability)	Debt Dispute 🔲 🛛	
Empl	oyment Details Notes:		
		<i>i</i>	

#### 5.1.3 PAYMENT DETAILS

- Proceed to the "Payment Details" tab,
- Select "Method of Payment (Applicant)" as shown in the below screen.

1	Details	etans Details	L	
Q. Create Case				
🛓 Case Enquiry	The (*) refers to a mandatory/requi	ired field.		Pension Number: 9
Mupdate Case	Method of payment (Applicant) *	- Please Select	7	
IN-PROGRESS		Area Marine Mari		
	Payment Details Notes:			
h			*	
1 1 3				
1. 1. 1.				
11 11 14				
	Back			Proceed
116 316 314				

Select the method of payment from the drop down list e.g. "Bank or International Bank" as shown below.

CASE MANAGEMENT	Z102 form details for Z N	ТАТЕТНАВА			
	Personal Details	Employment Details	Payment Details	Supporting Documents	Employe Representa
Q Create Case					
& Case Enquiry	The (*) refers to a ma	ndatory/required field.			Pension Number:
	Method of payment (Appl	icant) *	- Please Select -	•	
	Method of payment (Appl	icant) *	– Please Select – – Please Select –	•	
	Payment Details Notes:		International Bank Bank		
MR A			Duin		
1//////////////////////////////////////					

After you selected, you will notice that other fields will be shown e.g. Name of account holder, Bank Name, Branch Name, Branch Code, Account number as shown in the below screen.

Inbox	Details	Details	Details	Documents	Representative
Create Case					
Case Enquiry	The (*) refers to a mand	atory/required field.			Pension Number: 543
	Method of payment (Applica	nt) * Ba	nk	×	
-PROGRESS	Banking Details:				
MR Z NTATETHABA	Name of account holder *				
	Bank Name *	Bran	ch Name *		
	- Please Select -	•		Ŧ	
		0			
	Branch Code *	Acco	unt Number *	Account Typ	ie *
		40	91009237	Please S	Select 🔻
	U	U		U	
	1				

- > Proceed to complete the bank details as prompted by the requested fields.
- > Fields may already be pre populated if the GPAA has the relevant information.
- If the pre-populated fields have information that differs with the bank form to be submitted, change the information to be aligned with that of the bank form.

ASE MANAGEMENT	Z102 form details for Z	МТАТЕТНАВА			
Inbox	Personal Details	Employment Details	Payment Details	Supporting Documents	Employer Representative
Create Case	The (*) refers to a m	andatory/required field.			Pension Number: 543
	Method of payment (App	blicant) *	Bank	¥	
N-PROGRESS	Banking Details:				
MR Z NTATETHABA	Name of account holder	*			
	Z Ntatethaba				
	Bank Name *	Bra	nch Name *		
	ABSA	• A	ABSA GENERIC	T	
	Branch Code *	Acc	ount Number *	Account Typ	e *
	632005		09237	Please S	Select - 🔹 🔻
	0	0		0	

> To proceed with the case, click on the "Proceed" (green push button)

IN-PROGRESS	Prumont Dataile Netror
al de de	
	Back

#### 5.1.4 SUPPORTING DOCUMENTS

- Next is the "Supporting Documents" tab.
   Tick "Yes" (radio button)" for the attached documents or "No" if documents are not attached. The system will require your choice to proceed.

G E your investment	PF at. your future				📘 Andiswa Maila~
CASE MANAGEMENT	Z102 form details for				
nbox	Personal Details	Employment Details	Payment Details	Supporting Documents	Employer Representative
Q Create Case	The (*) refers to a man	datory/required field.			Pension Number: 9031
	Please tick the appropriate b documents in the sequence a	oxes below to indicate that as indicated on the checklis	all the required supporting d t.	locumentation will be attached.	Please upload the supporting
IN-PROGRESS	An originally certified copy o Policy.	f an ID (must be bar-coded)	or Attached Passport of the	e member – exceptions as per IC	O Attached Yes⊙ No⊙
	Proof of termination of servi PERSAL stating the Payroll N service of the member.	ce is required such as a prin Io (PERSAL No), Withdrawal	tout of Attached the Service reason, Withdrawal date, Sa	e Termination or Service Record alary level and notch on the last	from Attached day of Yes☉ No☉
	Conditional: For when the su proof from the Department o	rname of the person is diffe f Home Affairs is required to	rent to the surname on the li o confirm the surname	D, Passport or Death Certificate	. Only Attached Yes No
	Duly completed ACB Bank Pa completed Z1525 form with	articulars Form (Z894) or fo Particulars of approved exte	r actuarial transfer to an app ernal retirement fund for tran	proved external retirement fund nsfer of funds.	a duly Attached Yes© No©
	Originally signed GEPF Resig Option 1: receiving a once-o	nation Choice Form from th ff gratuity payment into own	e member where a once-off account; or Option 2: transf	irrevocable choice is made bett ferring the benefit to an approve	ween: Attached rd Yes No

- > After completing the screen, you will need to upload your supporting documents.
- > To upload documents, click on the "Browse button" as shown below
- > Documents must be in pdf format and not be bigger than 5MB.

211 10 113	An original certified copy of the member's final salary advice printed from payroll system	
		Yes® No⊖
	Conditional: For when the Commencement Date (Service Date) is amended, then proof of contributing service is needed in the form of a copy of an appointment advice to the salary department, salary/leave record, pay slip, or IRP 5 tax certificates for the applicable years. A duly completed Membership Update Form (Z125) is also required.	Attached Yes <b>⊡</b> No⊖
	Document Management	
	Uploaded documents must be pdf format and not be bigger than 5mb. Multiple Document Uploader BCwse	
	Supporting Documents Notes:	

- > Browse through the documents library list to "Upload" the correct document.
- Select / Choose File or document/s to Upload.

🗧 Favorites 🔜 Desktop	Documents library Includes: 2 locations		Arrange	e by: Folder 🕶	🕕 Pause Record 🗿 Stop Re
Downloads	Name	Date modified	Туре	Size	
🔛 Recent Places	📜 learning PHP_MySql_JavaScript.pdf	2015/11/17 09:15	Adobe Acrobat D	4 160 KB	
	[O'Reilly] - JavaScript. The Definitive Gui	2015/11/16 05:29	Adobe Acrobat D	13 498 KB	
Desktop	🐩 C# 5.pdf	2015/11/16 04:34	Adobe Acrobat D	5 177 KB	buting service is
词 Libraries	📆 1-8-programming-c.pdf	2015/11/16 04:33	Adobe Acrobat D	7 883 KB	ford, pay slip, or
Documents	💻 🗮 C# 5.0 in a Nutshell, 5th Edition.pdf	2015/11/16 04:33	Adobe Acrobat D	12 488 KB	y is also required.
J Music	~WRL0001.tmp	2015/11/07 08:14	TMP File	89 KB	
Fictures	UFT_GUI_Tutorial.pdf	2015/11/06 02:25	Adobe Acrobat D	1 428 KB	
Videos	iselenium-java-2.48.2.zip	2015/10/30 03:48	Compressed (zipp	21 899 KB	
🔏 Mpho Molefe	mtn.docx	2015/10/27 11:26	Microsoft Word D	38 KB	
📜 Computer	05 Grateful ft Tabello Sukwene.mp3	2015/10/22 07:44	MP3 Format Sound	6 813 KB	
🏭 Windows (C:)	11 Breath life.mp3	2015/10/22 02:22	MP3 Format Sound	8 501 KB	
HP_RECOVERY (D:)	03 Eyes on the prize.mp3	2015/10/22 02:18	MP3 Format Sound	15 572 KB	
HP_TOOLS (E:)	MPHO - GPAA Performance Evaluation D	2015/10/18 02:15	Microsoft Word 9	122 KB	E
🔮 DVD RW Drive (F:)	Drawing1.vsd	2015/10/01 11:22	Microsoft Visio Dr	567 KB	
CD Drive (G:)	Test Traceability Matrix.xlsx	2015/09/17 09:43	Microsoft Excel W	17 KB	
🙀 mainframe (\\gpaa-cd-g01) (Q:)	T LEAVE FORM AMENDED WEF 20130101 p	2015/08/24 08:55	Adobe Acrobat D	1 108 KB	
🖵 data (\\172.16.142.40) (R:)	New search by ID numberTesting.xlsx	2015/08/20 02:19	Microsoft Excel W	79 KB	
👿 shared (\\172.16.249.21) (Y:)	3 ~\$2015 08 13Defects.xlsx	2015/08/13 08:19	Microsoft Excel W	1 KB	
🧝 GijimaAST (\\172.16.249.59) (Z:)	- 2015_08_13Defects.xlsx	2015/08/13 08:19	Microsoft Excel W	12 KB	-
File name: UFT_GUI_Tute	torial.pdf		✓ All Files (*.*)	5	-

The uploaded document/s will be seen on the upload queue as shown below
 Click on the "Upload" (green button) to upload the document.

					Yes No
Conditional: For when the Commencement Date (S needed in the form of a copy of an appointment adv IRP 5 tax certificates for the applicable years. A dul	ervice Date) is amended, then vice to the salary department, y completed Membership Upd	proof of contri salary/leave re ate Form (Z12!	buting serv cord, pay sl 5) is also ree	ice is lip, or quired.	Attached Yes I No
Document Management					
Uploaded documents must be pdf format and n	ot be bigger than 5mb.				
Multiple Document Uploader	Browse				
UPLOAD QUEUE					
Files in Queue: 1					
Name	Size	Progress	Status	Actions	
UFT_GUI_Tutorial.pdf	1.39 MB			• Upload	I 💼 Remove
Queue progress:					

You will be able to view on the queue, the document's name, size, progress and status of the upload.

					Yes	© No⊖
Conditional: For when the Commencement Date (Serv needed in the form of a copy of an appointment advice IRP 5 tax certificates for the applicable years. A duly c	ice Date) is amended, the e to the salary department completed Membership Up	n proof of co t, salary/leav odate Form (	ontributin re record, Z125) is a	g service is pay slip, or Iso required	Attac Yes	hed No
Document Management						
Uploaded documents must be pdf format and not l	be bigger than 5mb.					
Multiple Document Uploader	Browse					
UPLOAD QUEUE						L's
Files in Queue: 1						
Name	Size	Progress	Status	Actions		
UFT_GUI_Tutorial.pdf	1.39 MB		~	Upload	View PDF	Remove

Click on the "Proceed" (push button) to continue after the upload has been completed successfully

19	Queue progress:	-	
	🟵 Upload all		
	Supporting Documents Notes:		
2			
1		,	
	Back		Proceed

#### 5.1.5 EMPLOYER REPRESENTATIVE

- > After clicking on the "Proceed" button the Employer Representative screen will be reflected.
- > You will see details of the user who processed the claim e.g. Full Names, Designation, Telephone number, Address (your user details).

CASE MANAGEMENT	Z102 form details for			-		
nbox	Personal Details	Employment Details	Payment Details	Additional Information	Supporting Documents	Employer Representative
Q Create Case						
🛓 Case Enquiry	The (*) refers to a	a mandatory/required fie	ld.		1	Pension Number: 90103009
11/////////////////////////////////////	Case Created By					
	Full Name		Designation		Tel No	
	Andiswa Maila		Capturer		0122192323	3
IN-PROGRESS	Fax No.		E-mail			
	01221231231		tester1@gpaa.g	ov.za		
	Postal Address	Suburb		City	c	ountry
	34 Hamilton street	Arcadia	3	Pretoria		South Africa
	Postal Code					
	0001					

- You may choose to open and view the Z102 for correctness by accessing the "View Z102" button.
- You may also click the "Back" button to go to the previous screen if you wish to make corrections.
- > Click on the "Submit Application" (push button) to forward / submit your application.
- A screen with the name of the member and the WT reference number e.g. "WT2017013111401848867" will pop-up with the message to proceed to send the application to the Verifier as seen below.

A Cuse Enquiry	he (*) refers to a mandatory/required field.	
Case Enquiry Case C Full N Mph IN-PROGRESS Fax N 0125 MR MA O125 O001 A4 h Postal 0001	he (') refers to a mandatory/required field.  MR MA  You have chosen to send this application to the Employer Verifier for approval. Do you want to continue?  Cancel Proceed	d No D12233325 Country South Africa
B	ck 🖹 View Z102	Submit Application

- Click on the reference number.
- It will be highlighted and a menu item box will be shown as shown below
- > Click on "Copy" (in the menu item box), to save the reference number for future reference.

A Case Enquiry	The (*) refers to a mandatory/required field	f		
	Case Cr MR MA	WT201701311140	1848867	n (
🤲 Update Case	Full Nar		Cut Copy	
IN-PROGRESS	Fax No.	<ul> <li>✓</li> </ul>	Paste Select all Print	
MR MA	You have chosen to send this approval. Do	application to the Employer v	Print preview E-mail with Windows Live Map with Bing Maps	try
	Postal C 0001	Cancel	Translate with Bing All Accelerators	
	Back View Z102		Send to OneNote	Submit Application
We				

Click on the "Proceed" (push button) to send the application/case to the Employer Verifier as shown below.

A Case Enquity	The (*) ref	ers to a mandatory/require	d field.	L.		
	Case Cr MR I	MA \		WT2017 114018488	367	
IN-PROGRESS	Full Nan Mpho Fax No.				el No 012232326	
MR MA	01256 Postal / 34 har	u have chosen to send approval	this application to Do you want to c	the Employer Verifier fo ontinue?	or ca	ountry South Africa
	0001	View Z102	_	Cancel Procaed		Submit Application

- > The application will now be forwarded to the Verifier.
- > It will not reflect in your Inbox thereafter.

#### 5.1.6 SHORT MESSAGE SERVICES (SMS)

The barcode of the rejected PCM case will be included in the sms e.g. "Dear GEPF member, the GPAA returned your pension benefit application. Kindly contact HR office for more information. Reference 9258403144 for rejection".

#### 5.1.7 THE ACCOUNT HOLDER VERIFICATION (AHV) REJECTION REASONS

These rejection reasons will reflect on the top part whereby other warnings reflected. The table below is only there to give list of reasons that can show at any instance. Take note of the new addition "No rejection reason provided by bank".

Reason Code	Description							
А	Incorrect Bank Account Number or No Match Found							
В	Incorrect ID Number or Company Registration Number							
С	Incorrect Initials							
D	Incorrect Name Or Incorrect Supplier Name							
I	Unique ID must be unique							
J	Function name is mandatory							
к	Request area is mandatory							
L	Person type is mandatory							

М	Bank code is mandatory and should be valid
N	Branch name is mandatory and should be valid
0	Branch code is mandatory and should be valid
Q	Account type is mandatory and should be valid
R	Account number is mandatory and should be valid
S	Title is mandatory
т	Initials are mandatory
U	First names are mandatory
V	Surname is mandatory
W	Identity number is mandatory
х	Company name is mandatory
Z	No rejection reason provided by bank

- PCM allows the employer Capturer to capture banking details.
   The GPAA submit banking details to National Treasury for validation, if bank validation fails, the case will be sent back to employer Capturer Inbox for corrections. The bank validation reason/s for failure will be displayed in the comment section of the Case Enquiry.

#### 6. OTHER EXIT TYPES

- You will notice that the above mentioned process dealt with the Resignation Case, Members "Own Account".
- The following processes will show the following: Resignation Transfer, Retirement, Discharge and Death in Service.

#### 6.1 **RESIGNATION TRANSFER**

GEPF your investment. your future			///		///		/ ///	
CASE MANAGEMENT	TYPE	E OF EX	IT					
Q Create Case	R	ESIGN	TION				۳	
	YY	SERV	<b>CE TEI</b> 1-DD	RMINA	TION	DATE		
	<			March	2017			>
	0	Mon	Tue	Wed	Thu	Fri	Sat	Sun
	10	2/	28	08	02	10	11	12
	11	12	14	15	16	10	10	12
	12	10	21	10	22	24	25	26
	12	20	21	22	20	24	23	20
	13	03	28	29	06	07	01	02
		0.5	0.4					0.2
	Т	oday	Clear				CI	ose

- Click the "create case" button
- > Type of exit
- Service termination date
- > The following screen will appear after you have put the correct date to terminate service.
- > Load the search criteria and submit.
- Click on the "Select" button

	1.11/1/11	111,1111		1.1.1.		///////////////////////////////////////	[]]]]	11.11	////////	1.1.1.1.1.1.
CASE MANAGEMENT	TYPE OF EXIT									
Q Create Case	RESIGNATION		v							
🛎 Case Enquiry										
	SERVICE TER	MINATION DATE								
	2017-02-28	1								
	SEARCH									
	ID Number	Passport Num	ber Member	Numbei	r Emp	oloyee Number	Persona	Details		
	Mem	ber Number	921		_					
			Submit							
	Results									
	ID Number	Passport Number	Member Number	Title	Initials	Name & Surname	Gender	Start Date	Termination Date	
	87086		<b>921</b>	MR	GW		MALE	1996-05- 01	2017-02-28	SELECT

ASE MANAGEMENT	Personal Details	Employment Details	Payment Details	Supporting Documents	Employer Representative
Create Case	The (*) refers to a mand	atory/required field.			Pension Number: 9 21
	Persal Number *		Current Pension Number *	Pre-amalgan	nation Number
N-PROGRESS	Title *		9 21	Last Name(S	] urname) *
	MR	Ŧ	GW	· · · · · · · · · · · · · · · · · · ·	
i MR GW F	First Name(s) *		Gender *		
	GRAHAM		MALE	T	
	Maiden Name		ID number	Passport Nu	mber
	Date Of Birth *		Marital Status *	Is there a div	orce court order issued?
	1962-02-11		MARRIED	🔻 No 🖲 Yes	•
	Income Tax No*		Home Number	Cell Number	*
	1074		0 0	<b>L</b> 0440	)4
	Email Address				
	Email Address				

> Complete the personal details tab.

Click the "Start Application" green button on your bottom right-hand side of the page to proceed with the application.

Gauteng	2015	South Africa 🔻
Is the Postal Address same as the Re	esidential Address? No 🔍 Yes 🖲	
Postal Address		
P.O Box	Suburb	City *
HEATHCOTEWEG 56	HEATHER PARK	PORT ELIZABETH
Province/State *	Postcode *	Country *
Province/State	6001	South Africa 🔹
Cancel		Start Application

> Proceed to the "Employment Details" tab.

SE MANAGEMENT	Z102 form details for GW	V					
Inbox	Personal Details	Employment Details	t i i i i i i i i i i i i i i i i i i i	Payment Details	Sup Doc	porting uments	Employer Representative
Create Case	-						
Case Enquiry	The (*) refers to a mar	ndatory/required fiel	ld.			P	ension Number: 3921
	Employer Code *		Employer N	ame *		Occupation Cod	le *
	000055		SOUTH A	FRICAN POLICE SERVIO	DE	SAPS	
N-PROGRESS	D		0			0	
			*			Service Termina	ation Date *
	Period covered by pension contributions		1984-03-2	16	<b></b>	2017-02-28	<b>iii</b>
			0			0	
			*				
	Pension Retirement Age : (As per service conditions)		60		•		
			0				
	//						
	Annual pensionable salary re salary values, please round t 50 cents up. Examples : (1)	eflecting the increas to the nearest rand v R535435.40 round o	e periods durir value. When co down to R535,4	ng last three (3) years o mpleting salaries, plea 135 (2) R535435.60 rou	or whole perio se round down und up to R53	d if shorter. Please n from 49 cents do 5,436	do not capture cents in the wnwards and round up from
	Period From*		Period To*			Annual Salary *	Sort
	2016-04-01	<b> </b>	2017-02-2	8		435090	+ -
	Period From*		Period To*			Annual Salary *	

Verify the details on the screen as you scroll down the page.
Change/amend where required

Period From*		Period To*		Annual Salary *	
2016-04-01	<b>m</b>	2017-02-28	<b></b>	435090	+ -
Period From*		Period To*		Annual Salary *	
2015-07-01	<b></b>	2016-03-31	<b></b>	404358	+ -
Period From*		Period To*		Annual Salary *	
2015-04-01	<b></b>	2015-06-30	<b></b>	388803	+ -
Period From*		Period To*		Annual Salary *	
2014-04-01				363366	
Add Item(s) Bought service period	to be recognised	2015-03-31			
Add Item(s) Bought service period Add Item(s)	to be recognised	2015-03-31			
Add Item(s) Bought service period Add Item(s) Break in service perio	to be recognised	2015-03-31			
Add Item(s) Bought service period Add Item(s) Break in service perio Add Item(s)	to be recognised	2015-03-31			
Add Item(s) Bought service period Add Item(s) Break in service perio Add Item(s)	to be recognised	2015-03-31			
Add Item(s) Bought service period Add Item(s) Break in service perio Add Item(s) Reason For Terminati	to be recognised	2015-03-31			
Add Item(s) Bought service period Add Item(s) Break in service perio Add Item(s) Reason For Terminati - Please Select -	to be recognised	2015-03-31			Get Rul
Add Item(s) Bought service period Add Item(s) Break in service perio Add Item(s) Add Item(s) Reason For Terminati - Please Select - Please Select - Please Select	to be recognised	2015-03-31			Get Rul

- Click the "Get Rules" button
- > Proceed to the "Reason for Termination" drop-down menu.
- Select the correct option.

	Break in service period (NB: Should be equal or gre	eater 120 days)	
	Add Item(s)		
	Reason For Termination * Required		
	Please Select		• Get Rules
	Age at Exit 0 0		
	Pensionable Years		
	0		
	Exit Rule		
	Exit Sub-Rule		
	Total Debul December of Vehiller		1
	Iotal Debt(Department liability)	Debt Dispute 🗆 []	
	0	Ν	
		18	
	Employment Details Notes		
0.11112.1111.11			

- > Exit Rule and Exit Sub-Rule will be populated accordingly, as per your selection.
- > Verify if your selection is correct according to the GPAA exit rules.
- > You will also notice that when you click on the "Total Debt" button, the field will appear where you can write the amount owed by the member according to documents you have.
- > You will also click in the "Debt Dispute" box if there are any disputes.

Exit Rule		
14.4.1		
Exit Sub-Rule		
14.4.1(a)		
Total Debt(Department liability)	Debt Dispute 🗹 []	
10000		
0		
Employment Details Notes:		
There is debt of R10000		
Back		Proceed

If there is a "Break in Service" of less than 120 days, the system will indicate as follows. Here the GPAA rules must apply on the treatment of 120 days.

Exit Rule		
14.4.1 Exit Sub	PCM-201703(11112226368	
14.4.1 Total De	×	
10000 D Emplo	Section B: Salary periods are invalid. Break in service is less than 120 days.	
There	Close Inbox	
Ba	sk	Proceed

- > Leave Without Pay (LWP): Only the period over 120 days the capturer can capture.
- In the "Method of Payment" field you will select "Transfer to External"

ASE MANAGEMENT	Z102 form details for GW	WT2017	54219		
Inbox	Personal Details	Employment Details	Payment Details	Supporting Documents	Employer Representative
Create Case					
Case Enquiry	The (*) refers to a manda	atory/required field.			Pension Number: 921
<u> </u>	Marked of a summer (Applies	-4) +			
	Method of payment (Applican	-	Please Select	T	
N-PROGRESS	2	Т	ansfer to External		
	Payment Details Notes:				
MR GW					
				1.	

> When selecting "Method of Payment" to "Transfer to External" the system will take you to transfer to external box where you will fill-in the approved Fund details as shown below.

your investment, y	rour future			1 1.5.1 1 1 1 1 1 1 1 1 1 1 1	
CASE MANAGEMENT	Z102 form details for <b>GW</b>	F WT20170	31854219		
lnbox	Personal Details	Employment Details	Payment Details	Supporting Documents	Employer Representative
Q Create Case					
🛓 Case Enquiry	The (*) refers to a mai	ndatory/required field.			Pension Number: 921
* <b></b>	Method of payment (Appli	cant) *	ansfer to External	Y	
IN-PROGRESS	Transfer Funds to:				
MR GW	Fsb Number:	12/8			
	SARS Registration Numbe	r:			
			arah		
		Se			
	Payment Details Notes:				
	- ayment botano notos.				

- > Complete the FSB number or SARS registration number details.
- Click the "Search" button.
- > The external Fund details will then be populated, if on the GPAA records.

ASE MANAGEMENT	Z102 form details for <b>BT</b>	WT20170	0986458		
Inbox	Personal Details	Employment Details	Payment Details	Supporting Documents	Employer Representative
Create Case					
Case Enquiry	The (*) refers to a mand	atory/required field.			Pension Number: 1708
	Method of payment (Applica	nt) *	Transfer to External	T	
-PROGRESS	Transfer Funds to:				
MR BT	Fsb Number:	<b>12/8</b> 31	500		
	SARS Registration Number:				
			Search		
		-			
	Name: RANDGOLD PROVIDENT FUN	FS D 12	8 Number: 2/8/31500	SARS Registra	tion Number
	Policy Number: *				
	Name of Account Holder	Ba	ank Name	Branch Name	
	RANDGOLD PROVIDENT FU	JND			

RANDGOLD PROVIDENT FUND	12/8/31500	SARS Registration Number
Policy Number: *		
000000000000		
Name of Account Holder	Bank Name	Branch Name
RANDGOLD PROVIDENT FUND		
Branch Code	Account Number	Fund Reference
0		X22402
Payment Details Notes:		
Payment Details Notes:		

- When finished you will click the "Proceed" button to go to the next tab.
   Next step will be the "Supporting Documents" tab, whereby you will tick either "Yes" or "No" according to documents you have.

CASE MANAGEMENT	Z102 form details for <b>BT</b>	WT201703	986458		
⊆ Inbox	Personal Details	Employment Details	Payment Details	Supporting Documents	Employer Representative
Q Create Case			-		
Case Enquiry	The (*) refers to a ma	ndatory/required field.			Pension Number: 1708
	WARNING: DOHA REQUEST	ED			
	Please tick the appropriate documents in the sequence	boxes below to indicate that a as indicated on the checklist.	ll the required supporting de	ocumentation will be attached.	Please upload the supporting
IN-PROGRESS	An originally certified copy	of an ID (must be bar-coded) o	or Attached Passport of the	member – exceptions as per l	D Attached
MR BT	Policy.				Yes® No⊖
	Proof of termination of serv PERSAL stating the Payroll service of the member.	ice is required such as a print No (PERSAL No), Withdrawal	out of Attached the Service reason, Withdrawal date, Sa	Termination or Service Record lary level and notch on the last	l from Attached t day of Yes® No☉
	Conditional: For when the suppoor from the Department	urname of the person is differ of Home Affairs is required to	ent to the surname on the IC confirm the surname	), Passport or Death Certificate	e. Only Attached Yes◯ No®
	Duly completed ACB Bank F completed Z1525 form with	Particulars Form (Z894) or for Particulars of approved exter	actuarial transfer to an appr nal retirement fund for tran	roved external retirement fund sfer of funds.	a duly Attached Yes® No©
	Originally signed GEPF Resi Option 1: receiving a once-o external retirement fund.	gnation Choice Form from the ff gratuity payment into own a	member where a once-off account; or Option 2: transfe	irrevocable choice is made bet erring the benefit to an approve	tween: Attached ed Yes® No⊖
	Copy of a letter of approval discharge (Misconduct or Il	for discharge signed by the H I-health by own doing), applic:	ead Attached of an office (D able section of the act and d	epartment), stating the reasor late of resignation.	n for Attached Yes No®

> After ticking "yes" or "no" you will go to the "Document Management" section to upload all available documents as ticked.

Copy of the Resignation Form (like Z280) or Letter of Attached	Attached Yes® No⊙
Conditional: For debt deduction: An originally certified copy of a Court Order or Member's approval in writing for debt due to Negligence, Misconduct or Theft as per GEP Law – Section 21.3(c) or in respect of debt for more than the value of R10,000.	Attached Yes <sup>©</sup> No®
Conditional: Where the member had a previous marriage, an originally certified copy of the former spouse's ID (must be bar coded) or Passport, Marriage Certificate, Death Certificate, Settlement Agreement and/or Decree of Divorce are needed. Where payments are due to an ex-spouse an ACB Bank Particulars Form (Z894) is needed. Divorce Settlement Agreements for the division of pension interest are only effective from 1 August 1989 as per the amendment to the Divorce Act 1 and a separate Withdrawal form.	Attached Yes⊖ No®
Conditional: For members with 10 years or more of service a duly completed Updating Personal Particulars of Member Form (Z864).	Attached Yes® No©
An original certified copy of the member's final salary advice printed from payroll system.	Attached Yes® No◯
Conditional: For when the Commencement Date (Service Date) is amended, then proof of contributing service is needed in the form of a copy of an appointment advice to the salary department, salary/leave record, pay slip, or IRP 5 tax certificates for the applicable years. A duly completed Membership Update Form (Z125) is also required.	Attached Yes <sup></sup> No®
Document Management	
Uploaded documents must be pdf format and not be bigger than 5mb.	
Multiple Document Uploader Choose Files No file chosen	
Supporting Documents Notes:	

> You will go to the "Document Library" to up-load documents after you have scanned them to you computer.
| Organize 🔻 New fold                      | ler   |                    | = • 🔳 🔞         |  | Yes® No  |
|--|---|--------------------|-----------------|--|----------|
| ★ Favorites ■ Desktop                    | Documents library<br>TGS Docs               | Arrange            | e by: Folder 🔻  | ate) is amended, then proof of contributing service is needed in | Attached |
| Downloads                                | Name  | Date modified      | Туре            | epartment, salary/leave record, pay slip, or IRP 5 tax           | Yes No®  |
| M Recent Places                          | 2015  | 2/26/2015 3:38 PM  | File folder     | indersnip opdate Form (2123) is also required.                   |          |
| 📜 Libraries 👘                            | 3016  | 7/27/2016 1:03 PM  | File folder     |  |          |
| Documents                                | J Applications                              | 11/28/2016 2:28 PM | File folder     |  |          |
| -) Music                                 | 퉬 Benefit Statement                         | 9/9/2016 3:48 PM   | File folder     |  |          |
| Pictures                                 | 🕌 Certificates                              | 11/28/2016 1:58 PM | File folder     |  |          |
| Videor                                   | \mu cv                                      | 2/10/2017 10:40 AM | File folder     | ager than 5mb.   |          |
| In videos                                | Security Clearance                          | 7/27/2016 1:03 PM  | File folder     | 130. dial of 101   |          |
| Computer                                 | 1400 Lisence                                | 8/6/2010 2:39 PM   | Adobe Acrobat D | file chosen  |          |
| Computer                                 | Acknowledgement of Debt Medical overpayment | 8/3/2010 9:29 AM   | Adobe Acrobat D |  |          |
| cocal Disk (c.)                          | ·   |                    |                 |  |          |
| T stidled (//gpoort:                     |   |                    |                 |  |          |
| File r                                   | hame:                                       | ✓ All Files        | •               |  |          |
|  |   | Open 🔽             | Cancel          |  |          |
|  |   |                    |                 |  |          |
| 1 pop pop pop pop pop pop pop pop pop po | TTTTTTTTTTTT                                |                    |                 |  |          |
|  |   |                    |                 |  |          |
|  |   |                    |                 |  |          |
|  |   |                    |                 |  |          |
|  |   |                    |                 |  |          |
|  |   |                    |                 |  |          |
|  |   |                    |                 |  |          |
|  |   |                    |                 | 4  |          |
|  |   |                    |                 |  |          |
|  |   |                    |                 |  |          |
|  |   |                    |                 |  |          |
|  |   |                    |                 |  |          |
|  | Baek  |                    |                 |  | Proceed  |
|  |   |                    |                 |  |          |

- After choosing the file to be uploaded, you will see the name of the "File" as well as it's "Size", "Progress" and "Status". You can view the uploaded files if you click on the "View PDF" button.
- > You can also "Remove" the file by clicking on the "Remove" (red) button as shown below.
- > If satisfied with the upload, click the "Proceed" button to go to next tab.

les in Queue: 1          Name       Size       Progress       Status       Actions         1400 Lisence.pdf       0.11 MB       ✓       © Uplood       ¥ View PDF       Remove         Supporting Documents Notes:	Ideo Lisence.pdf     Supporting Documents Notes:     Supporting Lisence.pdf	PLOAD QUEUE	UNDER THES THE INC THE UNDER				
Name     Size     Progress     Status     Actions       1400 Lisence.pdf     0.11 MB     ✓     © Upload     View PDF     @ Remove	Name     Size     Progress     Status     Actions       1400 Lisence.pdf     0.11 MB     ✓     © Uplood     View PDF     Remove	Files in Queue: 1		0'	Deserves	0	A
Supporting Documents Notes:	Supporting Documents Notes:	Name 1400 Lisence.pdf		0.11 MB	Progress	≺ Status	O Upload View PDF
		Supporting Documents Notes:					

- Next step will be the "Employer Representative" tab. Here your details will be shown according to how the GPAA has captured them.
- > If satisfied, click the "Submit Application" button.

GE your investment	<b>PF</b> t, your future						🙎 Andiswa Maila~
CASE MANAGEMENT	Z102 form details for <b>BT</b>	WT2017	0400	1986458			
	Personal Details	Employmen Details	ıt	Payment Details	Suppo Docum	rting nents	Employer Representative
Q Create Case							
🌲 Case Enquiry	The (*) refers to a mand	atory/required fie	ld.				Pension Number: 708
	WARNING: DOHA REQUESTED						
	Case Created By						
	Full Name		Desigr	nation		Tel No	
IN-PROGRESS	Andiswa Maila		Cap	turer		0122192	323
	Fax No.		E-mail				
MR BT	01221231231		test	er1@gpaa.gov.za			
	Postal Address	Suburb		С	Sity		Country
	34 Hamilton street	Arcadia	э		Pretoria		South Africa
	Postal Code						
	0001						
	Back View Z102						Submit Application

- > After clicking the "Submit Application" button, the system will show the following screen.
- Save the case reference number.
- > If satisfied, click the "Proceed" button to submit to the Verifier.

GE	PF MR BT			WT20170; 10098	6458	Andiswa Mailav
CASE MANAGEMENT a Inbox Q Create Case	Z102 You have chos	en to send this ap Do yo	plication to the Emj u want to continue	ployer Verifier for appro	val.	Employer Representative
Case Enquiry	Th WARNIN Case Crease			Cancel Proce	ed	Pension Number: 1708
	Full Name		Designation		Tel No	
IN-PROGRESS	Andiswa Maila		Capturer		01221	92323
	Fax No.		E-mail			
MR B	01221231231		tester1@gpaa.go	ov.za		
	Postal Address	Suburb		City		Country
	34 Hamilton street	Arcadia		Pretoria		South Africa
	Postal Code					
	0001					
	Back View Z102					Submit Application

> The application will now leave your Inbox and proceed to the Verifier queue.

## 6.2 RETIREMENT

- Click "Create Case"
- > Select the "Type of Exit" as "Retirement" as shown below.

### > Fill in the termination date.

your investment yo	<b>PF</b> Jur future			📘 Andiswa Mailav
	TYPE OF EXIT			
Q Create Case	RETIREMENT	٣		
Case Enquiry	PLEASE SELECT RETIREMENT RESIGNATION DISCHARGE DEATH_IN_SERVICE			
	YYYY-MM-DD	<b></b>		

- > Search the member records according to different search criteria as shown below.
- Click the "Submit" button.
- > You will notice that if the case requires Enhanced Spouse, you need to click "Yes" button as shown below.

GEP your investment, you	future	<b>CAP303 CAP303</b>
CASE MANAGEMENT	TYPE OF EXIT RETIREMENT	
Case Enquiry Reassign Cases Member Enquiry	Enhanced Spouse Benefit: • Yes          No	
	SERVICE TERMINATION DATE	
		Activate Windows Go to Settings to activate

> Click "Select" in the "Results" section as shown below.

2017-03-31									
SEARCH	SEARCH								
ID Number	ID Number Passport Number Member Number Employee Number Personal Details								
Mem	Member Number								
	I	Submit							
Results									
Results ID Number	Passport Number	Member Number	Title	Initials	Name & Surname	Gender	Start Date	Termination Date	

> Start verifying the member's "Personal Details" as shown below.

Inbox	Personal Details	Employment Details	Payment Additional Details Information		Supporting Documents	Employer Representative	
Create Case	The (*) refers to	a mandatory/required fiel	d.		Pens	Pension Number:	
· · · · ·	Persal Number *		Current Pension Nu	mber *	Pre-amalgamation	Number	
I-PROGRESS	Title *		Initials *		Last Name(Surnam	Last Name(Surname) *	
	First Name(s) *	First Name(s) *		Gender *			
	MADITSI		MALE		r		
	Maiden Name		ID number		Passport Number		
	Date Of Birth *		Marital Status *		Is there a divorce of	ourt order issued?	
	1957-03-20		MARRIED		No 🍭 Yes 🔍		
	Income Tax No*		Home Number		Cell Number *		
	59842		0 0		0822004404		

Residential Address		
Street Name *	Street Number	City *
42 Main Street		Pretoria
Complex Name	Complex Number	
Province/State *	Postcode *	Country *
Gauteng	0180	South Africa
Gauteng Is the Postal Address same as the Resid Postal Address P.O Box	dential Address? No Ves ®	City *
Gauteng Is the Postal Address same as the Resid Postal Address P.O Box DIE STASIEBEVELVOERDER	dential Address? No Ves  Suburb	City *
Gauteng Is the Postal Address same as the Resid Postal Address PO Box DIE STASIEBEVELVOERDER Province/State *	dential Address? No Ves  Suburb S A POLISIE Postcode *	City * POSBUS 38085 Country *

> Click the "Start Application" button to proceed to the "Employment Details" tab.

CASE MANAGEMENT	Z102 form details for ME	. III W	T20170228 854075					
Inbox	Personal Details	Employment Details	Payment Details	Additional Information	Supporting Documents	Employer Representative		
Create Case								
Case Enquiry	The (*) refers to a ma	field.		Pen	sion Number: 1669			
	Employer Code *		Employer Name *		Occupation Code	*		
	000055		SOUTH AFRICAN F	OLICE SERVICE	SAPS			
-PROGRESS	0		0		0			
			*		Service Termination	on Date *		
	Period covered by pension contributions		1982-02-08		2017-03-31	<b>m</b>		
			0		0			
			*		Severance Packag	Severance Package?*		
	Pension Retirement Age : (As per service conditions)		60		v No 🖲 Yes 🔍	No 🖲 Yes		
			0					
	Annual pensionable salary r salary values, please round 50 cents up. Examples : (1)	reflecting the incre to the nearest ran ) R535435.40 roun	ease periods during last th d value. When completing d down to R535,435 (2) R	ree (3) years or whole p salaries, please round o 335435.60 round up to P	eriod if shorter. Please do lown from 49 cents down R535,436	o not capture cents in the wards and round up fron		
	Period From*		Period To*		Annual Salary *	Sort		
	2016-04-01		2017-03-31	<b>iii</b>	295263	+ -		

> Verify salaries as per the documents you have.

Pension Retirement Age : (As per service conditions)	0 * 60 0	[] Severance Package?* ▼ No ⊕ Yes ◯
Annual pensionable salary reflecting salary values, please round to the no 50 cents up. Examples : (1) R53543	g the increase periods during last three (3) years earest rand value. When completing salaries, ple 5.40 round down to R535,435 (2) R535435.60 r	or whole period if shorter. Please do not capture cents in the ase round down from 49 cents downwards and round up from sund up to R535,436
Period From*	Period To*	Sort Annual Salary *
2016-04-01	2017-03-31	<b>1</b> 295263 + -
Period From*	Period To*	Annual Salary *
2015-07-01	2016-03-31	1 274407 + -
Add Item(s)	aad	
Add Item(s)		
Break in service period to be disreg	arded	

- Scroll down the page to the "Get Rules" button.
  Click on it and proceed to the "Reason for Termination" drop-down menu.
- > Verify "Exit Rule" as per GPAA exit rules.

Break in service period to be disregarded		
Add Item(s)		
Reason For Termination *		
Retirement: Normal retirement		▼ Get Rules
Age at Exit		
60	0	
Pensionable Years		
35		
Exit Rule		
14.3.1(a)		
Exit Sub-Rule		
14.3.3(a) + 14.2.1(a) + 14.2.1(b) + 14.2.1(c) +	4.2.6 + 14.2.4(a) + 14.2.2	
Total Debt(Department liability)	Debt Dispute 🔲 []	
0		

Scroll down the page to the "Proceed" button. Click on it to go to the next tab which is "Payment Details".

	Z102 form details fo	r ME	T201702 1854075			
🖨 Inbox	Personal Details	Employment Details	Payment Details	Additional Information	Supporting Documents	Employer Representative
Q Create Case						
Case Enquiry	The (*) refers to	a mandatory/required f	eld.		Per	sion Number: 569
	Method of payment (	(Applicant) *	Bank		•	
IN-PROGRESS	Banking Details:		– Please Select – International Ban Bank	ĸ		
	Name of account hol	lder *				
	Please Select	•	Branch Name *	,	-	
	0		0			
	Branch Code *		Account Number *		Account Type *	
			111453276		Please Select	- •
	n				U	
	n				u	

> Select the "Method of payment (Applicant)" field and choose the appropriate option. > Complete the details of the bank account holder as per the bank form.

EMANAGEMENT	Z102 form details for	ME	F201702 11185407	5		
xx	Personal Details	Employment Details	Payment Details	Additional Information	Supporting Documents	Employer Representative
eate Case						
ase Enquiry	The (*) refers to a	a mandatory/required fi	eld.		Pen	sion Number: 56
	Method of payment (#	Applicant) *	Bank		T	
ROGRESS	Banking Details:					
	Name of account hold	ler *				
	ME Makgatho					
	Bank Name *		Branch Name *			
	ABSA	Ŧ	ABSA GENERIC	,	•	
	0		0			
	Branch Code *		Account Number *		Account Type *	
	632005		3276		CHEQUE	
	n		Π		Π	

- Select the "Proceed" button to continue when completed with the "Payment details" tab.
   The next tab is the "Additional Information" tab as shown below.
- > Please note that this tab reflects because the exit type is "Retirement".
- > You will be required to complete the "Next of Kin" details as shown below, as per the documentation you have.

CASE MANAGEMENT	Z102 form details for	ME WI	20170 31118540	75		
🕒 Inbox	Personal Details	Employment Details	Payment Details	Additional Information	Supporting Documents	Employer Representative
Q Create Case						
🔹 Case Enquiry	The (*) refers to a	a mandatory/required fi	eld.		Pen	sion Number: 5669
	1. Next of Kin:					
IN-PROGRESS	Initials *		Last Name(Surnar	ne) *	First Name(s) *	
	Т		Teele		Thabiso	
	ID No. / Passport No.*		Home Number		Cell Number *	
	6712035236088		Next Of Kin Hon	ne Number	0822004404	
	Address					
	Street Name *		Street Number		City *	
	42 Maine Streeet		Next Of Kin Stre	et Number	Pretoria	
	Province/State *		Postcode *		Country *	
	Gauteng		0183		South Africa	T
	Do you wish to add the	second next of kin				
	Medical Benefit Particu	lars:				

- Scroll down the page until you get to the "Medical Benefit Particulars" as shown below.
- If a member chooses to continue with the medical subsidy, documentary proof must be attached.
- Tick the box "Does the member/spouse wish to continue with membership" and complete the respective fields.
- > If the member does not want to apply for the medical aid subsidy, do not tick the box.
- Scroll down to the bottom of the page and click the "Proceed" button.

oes the member / spouse wish to continue vith membership	2	
cheme Name * GEMS	Scheme Membership Number* 0 Did State Contribute to member subsidy* 🗭	Scheme Package Option * 0 State Contribution Amount* 1401
Additional Information Notes:		

> You will notice that because the case is Retirement Enhanced Spouse, the following screen will be shown.

Medical Benefit Particulars:			
Does the member / spouse wish to continue with membership			
NB: This Is A Enhanced Spouse Benefit.			
To Proceed. Please Click On The Button	Below To Generate The ESP1	Choice Form. *	
Additional Information Notes:			
		17	

- You will need to click on the Generate ESP1 and the form will be generated as shwon below and print it.
- > You will then fill Spouse details, if there are more than 4 Spouses duplicate this form.
- > Then attach the form to the package by uploading it as you did with other documents.
- GPAA will create a quotation and attach to the case send back to Employer for the member 's consideration, acceptance and return to GPAA for further processing.
- Note that where a request for quotation is required, the Retirement exit case will be held pending the return of signed/accepted quote from the member.

ETIREMENT	FORM - DISCHARGE	Ö	GER	'F USE ON	ILY - GEPF STA	AMPS ESP		
ivate Bag x63 Pre OUTH AFRICA )01	etoria 34 Hamilto Arcadia	n Street Pretoria				Call C E-mai Webs	Centre : 0800 117 66 il:enquiries@gepf.co ite: www.gepf.co.za	69 J.za
	THIS FORM MU	ST ONLY	BE USED FO	R RETIRE	MENT/DISCHA	RGE AFTER 31	OCTOBER 2019	).
ing member mu the member p	st indicate whether basses away. In or	r his or her der to qual	spouse(s) or ify for the high	life partner i ier annuity,	must receive a st the member will	andard (50%) or receive a reduce	enhanced (75%) sp d retirement gratui	pouse annuity, whe ity or annuity.
ing member must the member p	PARTICULARS C	r his or her der to qual )F MEMBI	spouse(s) or ify for the high ER	life partner i ier annuity,	must receive a si the member will Pe	andard (50%) or receive a reduce nsion Number	enhanced (75%) sp d retirement gratui 97789806	pouse annuity, whe
ing member mus the member p ) PERSONAL I Sumame	PARTICULARS C	r his or her der to qual DF MEMBI	spouse(s) or ify for the high ER	life partner i ier annuity,	must receive a st the member will Pe	andard (50%) or receive a reduce nsion Number	enhanced (75%) sg d retirement gratui 97789806	oouse annuity, whe ty or annuity.
ing member mu: the member p ) PERSONAL   Sumame First Name	PARTICULARS C NGOBE HERSLEY THOM	r his or her der to qual DF MEMBI	spouse(s) or ify for the high ER	life partner i ier annuity,	must receive a si the member will Pe	andard (50%) or receive a reduce nsion Number	enhanced (75%) sp d retirement gratui 97789806	oouse annuity, whe ty or annuity.
ing member mus the member p ) PERSONAL Sumame First Name Initials	est indicate whether passes away. In or PARTICULARS C NGOBE HERSLEY THOM HT	r his or her der to qual <b>)F MEMBI</b> (OZILE Title	spouse(s) or ify for the high ER MS	life partner i ier annuity,	must receive a st the member will Pe 1963-09-06	Indard (50%) or receive a reduce Insion Number	enhanced (75%) sp d retirement gratui 97789806 6309060958088	oouse annuity, whe

- You will go to the bottom right part of the screen and click Proceed to go to Supporting documents tab.
- > The "Supporting Documents" tab must be completed in the same manner as the Resignation case tabs in the above examples.

GE your investment, y	our future					Andiswa Mailav
CASE MANAGEMENT	Z102 form details for Personal Details	ME Employment Details	201702 11185407 Payment Details	75 Additional Information	Supporting Documents	Employer Representative
Q Create Case	The (*) refers to	ion Number: 669				
	Please tick the approprion documents in the sequ	riate boxes below to indic ence as indicated on the	ate that all the require checklist.	d supporting documenta	tion will be attached. Plea	se upload the supporting
IN-PROGRESS	An originally certified o Policy.	opy of an ID (must be ba	r-coded) or Attached F	Passport of the member -	exceptions as per ID	Attached Yes® No©
	Duly completed ACB B completed Z1525 form	ank Particulars Form (Z8) with Particulars of appro	94) or for actuarial tran wed external retirement	nsfer to an approved exte nt fund for transfer of fun	rnal retirement fund a dul ds.	y Attached Yes® No⊙
	Originally certified cop	ies of documentation for	proof of retirement:			Attached Yes® No⊙
	Proof of termination of PERSAL stating the Pa service of the member.	service is required such yroll No (PERSAL No), Wi	as a printout of the Se thdrawal reason, With	rvice Attached Terminati drawal date, Salary level a	on or Service Record from and notch on the last day o	Attached of Yes® No©
	Conditional: for early re	etirement a copy of letter	of approval for early r	etirement signed by the H	lead of Department.	Attached Yes◯ No®

Conditional: for retirement of a Director-General: a copy of the service contract(s).	Attached Yes◯ No®
Conditional: for service contract(s) expiring: a copy of the service contract(s).	Attached Yes◯ No®
Conditional: For debt deduction: An originally certified copy of a Court Order or Member's approval in writing for debt due to Negligence, Misconduct or Theft as per GEP Law – Section 21.3(c) or in respect of debt for more than the value of R10,000.	Attached Yes <sup>©</sup> No®
Conditional: for members with more than 10 years of pensionable service: Duly completed GEPF Spouse Choice form where a once-off irrevocable choice is made for future pension for a widow upon the death of the member (even if the member is not currently married).	Attached Yes® No⊙
Duly completed Updating Personal Particulars of Member Form (Z864).	Attached Yes® No©
Conditional: When a marriage is registered an originally certified copy of the marriage certificate is required or alternatively the required affidavit(s) for consideration. For a Life Partnership: affidavits setting out the nature of the relationship and indicators (preferably with supporting documentation), of that relationship from a member of each party's family, a joint friend and/or an authorised member of any organisation, institution or society of which one or both parties has been a member.	Attached Yes◯ No®
Conditional: Where the member had a previous marriage, an originally certified copy of the former spouse's ID (must be bar-coded) or Passport, Marriage Certificate, Death Certificate, Settlement Agreement and/or Decree of Divorce are needed. Where payments are due to an ex-spouse, an ACB Bank	Attached Yes® No©
Particulars Form (Z894) is needed. Divorce Settlement Agreements for the division of pension interest are only effective from 1 August 1989 as per the amendment to the Divorce Act1 and a separate Withdrawal from Fund Form (Z102) completed by the employer is needed.	Attached Yes® No◯
Originally certified copies of the member's last two salary advices printed from the payroll system.	Attached Yes® No

Originally certified copies of the member's last two salary advices printed from the payroll system.	Attached Yes® No©
Conditional: For when the Commencement Date (Service Date) is amended, then proof of contributing service is needed in the form of a copy of an appointment advice to the salary department, salary / leave record, staff record, pay slips, or IRP 5 tax certificates for the applicable years. A duly completed Membership Update Form (Z125) is also required.	Attached Yes <sup>©</sup> No®
Conditional: For when the surname of the person is different to the surname on the ID or Passport documents, a letter from the Department of Home Affairs or Full Birth Certificate of a child is required to confirm the surname.	Attached Yes◯ No®
An originally certified copy of the existing medical scheme Membership Certificate (and new Membership a) Certificate for medical scheme transfers) of the contributing member that is registered as the main medical scheme member.	Attached Yes® No⊙
Conditional: An affidavit or an originally certified copy of the service records to prove additional periods of broken government service that need to be added for medical subsidy purposes to prove 10 or 15 years of government service.	Attached Yes <sup>©</sup> No®
Conditional: For a contributing member, pensioner or spouse that choose a gratuity payment, a duly completed Updating Bank Particulars Form - Z894.	Attached Yes® No⊙
A duly completed State Subsidised Medical Contribution Choice Form to choose between continued memberships (4/6 GEPF subsidised) or the payment of an once-off gratuity.	Attached Yes® No©
Document Management	
Uploaded documents must be pdf format and not be bigger than 5mb.	
Multiple Document Uploader Choose Files No file chosen	
Supporting Documents Notes:	

		2	···· · · · · · · · · · · · · · · · · ·	se that choose a gratuity payment, a duly completed Undating	Attached
Favorites	Documents library TGS Docs	Arrange	e by: Folder 🔻	re diat choose a gracidity payment, a duty completed opdating	Yes® No
Downloads	Name	Date modified	Туре	hoice Form to choose between continued memberships (4/6	Attached
	2015	2/26/2015 3:38 PM	File folder		V AN A
Libraries	E 🛃 2016	7/27/2016 1:03 PM	File folder		Tes No
Documents	J Applications	11/28/2016 2:28 PM	File folder		
Music	Benefit Statement	9/9/2016 3:48 PM	File folder		
Pictures	Lectificates	11/28/2016 1:58 PM	File folder		
Videos	📕 CV	2/10/2017 10:40 AM	File folder		
	Security Clearance	7/27/2016 1:03 PM	File folder		
Computer	1400 Lisence	8/6/2010 2:39 PM	Adobe Acrobat E	ager than 5mb.	
Local Disk (C:)	Acknowledgement of Debt Medical overpayment	8/3/2010 9:29 AM	Adobe Acrobat C		
👷 mainframe (\\gp 🤊	- K			file chosen	
File	name:	All Files     Open	▼ Cancel		
File	name [	All Files     Open	Cancel		
File	name	▼ All Files	Cancel		
File	name	▼ All Files Open ▼	Cancel		
File	name	All Files     Open	Cancel		
File	name	All Files     Open	Cancel		
File		All Files     Open	Cancel		

Conditional: For a contributing member, pensioner or spouse that choose Bank Particulars Form - Z894.	e a gratuity p	ayment, a d	uly comple	eted Updating	Attached Yes® No⊖
A duly completed State Subsidised Medical Contribution Choice Form to GEPF subsidised) or the payment of an once-off gratuity.	Attached Yes® No				
Document Management					
Uploaded documents must be pdf format and not be bigger than 5mb	<b>)</b> .				
Multiple Document Uploader Choose Files No file chosen					
UPLOAD QUEUE					
Files in Queue: 1					
Name	Size	Progress	Status	Actions	
1400 Lisence.pdf	0.11 MB			⊕ Upload	iew PDF
Queue progress:					
③ Upload all					
Supporting Documents Notes:					

F	les in Queue: 1				
	Name	Size	Progress	Status	Actions
	1400 Lisence.pdf	0.11 MB		1	🕤 Upload 📔 View PDF 💼 Remove
Q	ueue progress:				
	⊕ Upload all				
	Supporting Documents Notes:				
	Back				Proceed
1					

> The "Employer Representative" tab must be treated similar to the Resignation cases above.

E MANAGEMENT	Z102 form details for N		20170228 8540	75		
box	Personal Details	Employment Details	Payment Details	Additional Information	Supporting Documents	Employer Representative
eate Case						-
ise Enquiry	The (*) refers to a r	mandatory/required fie	ld.			Pension Number:
<u>- 11243 -</u> 117						
	Case Created By				- 1.00	
	Full Name		Designation		Tel No	
			Designation			
1991	Andiswa Maila		Capturer		0122192323	1
ROGRESS	Andiswa Maila Fax No.		Capturer E-mail		0122192323	\$
RME	Andiswa Maila Fax No. 01221231231		Capturer E-mail tester1@gpaa.g	ov.za	0122192323	\$
R ME	Andiswa Maila Fax No. 01221231231 Postal Address	Suburb	Capturer E-mail tester1@gpaa.g	ov.za City	0122192323	ountry
NOGRESS	Andiswa Maila Fax No. 01221231231 Postal Address 34 Hamilton street	Suburb	Capturer E-mail tester1@gpaa.g	ov.za City Pretoria	0122192323	ountry South Africa
IOGRESS	Andiswa Maila Fax No. 01221231231 Postal Address 34 Hamilton street Postal Code	Suburb Arcadia	Capturer E-mail tester1@gpaa.g	ov.za City Pretoria	0122192323	ountry South Africa

your investment, yo	ur future						
	MR ME		WT201	02	11854075		
CASE MANAGEMENT	Z102		_				
🖬 Inbox	Pr C		<ul> <li></li> </ul>			porting uments	Employer Representative
Q Create Case							
Case Enquiry	O TH You have chosen to	send this applic Do you wa	ation to the Employer Veri ant to continue?	er for ap	oproval.	F	Pension Number: 5669
	Case Cre						
	Full Nam		Car		Inceed	l No	
316 19163811	Andisy		- Col		Toceed	0122192323	Í.
IN-PROGRESS	Fax No.	E	-mail				
MR ME	01221231231		tester1@gpaa.gov.za				
	Postal Address	Suburb	City			C	ountry
and and an	34 Hamilton street	Arcadia	Pre	toria			South Africa
11 - 11 - 11 - 11	Postal Code						
11 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	0001						
	Back View Z102						Submit Application

#### 6.3 EARLY RETIREMENT WITHOUT PENALISATION OF PENSION BENEFITS

- Click "Create Case"
- > Select the "Type of Exit" as "Retirement" as shown below
- > Fill in the termination date

GEPF your investment. your future	re		Participation Tester Training
CASE MANAGEMENT	TYPE OF EXIT		
Q Create Case		V	
Case Enquiry	RETIREMENT RESIGNATION		
M Reassign Cases	DISCHARGE DEATH_IN_SERVICE		
Member Enquiry	YYYY-MM-DD		

Search the member records according to different search criteria as shown below.
 Click the "Submit" button.

ID Nu	mber Pass	sport Number	Member	Number	Employee Number	Personal E	etails		
	Member Nur	ımber 🧧							
		Su	ubmit						
		Su	ubmit						
		Su	ıbmit						
Results		Su	ubmit						
Results		Su	ıbmit						
Results	Passp	sport Mem	ber				Start	Termination	
Results	Passp r Numb	port Mem ber Num	ber ber Ti	tie Initials	Name & Surname	Gender	Start Date	Termination Date	

- Take note the below screen will show as a warning that "Termination date selected is in the Future", if so click "Proceed".
- > Click "Select" in the "Results" section as shown below.



> Start verifying the member's "Personal Details" as shown below.

CASE MANAGEMENT	Personal	Employment	Payment	Additional	Supporting	Employer
	Details	Details	Details	Information	Documents	Representative
Q Create Case					_	
Case Enquiry	The (*) refers to	a mandatory/required fi	eld.		Pens	sion Number:
🦔 Reassign Cases	Demol Mumber		Current Manches N		Des enveluence	- Munchen
🛎 Member Enquiry	Persai Number *			Imper *	Pre-amaigamatio	on Numper
					Pre-amaigamati	ion
IN-PROGRESS	Title *		Initials *		Last Name(Surna	ame) *
	MR	Ŧ	J			
MR MR	Name(s) *		Gender *			
			MALE	,	•	
	Maiden Name		ID number *		Passport Numbe	r
	Date Of Birth *		Marital Status *		Is there a divorce	e court order issued?
	1-02		MARRIED	,	No 🔍 Yes 🔍	A ST A MARTIN
	Income Tax No*		Home Number		Cell Number *	Activate Windows Go to Settings to activate V
			Home Number			

> Fill-in address details as shown on Section 5.1.1 bullet 4 above (Resignation).

Residential Address		
Street Name *	Street Number	City *
2 LANGEFONTEINWEG	BREDASDORP	BREDASDORP
Suburb Q	Complex Name	Complex Number
BREDASDORP		
Province/State * Required	Postcode * Q	Country *
Province/State * Required  Please Select	Postcode * Q     T280	Country *
Province/State * Required  Please Select  Is the Postal Address same as Address?  Postal Address	v 7280 v the Residential No ®	Country * Please Select les
Province/State * Required Please Select Is the Postal Address same as Address? Postal Address P.O Box * Required	v 7280	Country * Please Select tes  City *
Province/State * Required Please Select Is the Postal Address same as Address? Postal Address P.O Box * Required P.O Box	Postcode • Q • 7280 s the Residential No • Suburb Q BREDASDORP	Country *  Please Select  es  City * BREDASDORP
Province/State * Required  Please Select Is the Postal Address same as Address? Postal Address P.O Box * Required P.O Box Province/State * Required	Postcode • Q 7280 s the Residential No • Suburb Q BREDASDORP Postcode • Q	Country *  Please Select  es  City *  BREDASDORP  Country *

Postal Address		
P.O Box *	Suburb	City *
P.O Box	KLERKSDORP	KLERKSDORP
Province/State *	Postcode * Q	Country *
Please Select	• 2570	Please Select

> Click the "Start Application" button to proceed to "Employment Details" tab.

CASE MANAGEMENT	Z102 form details for	117265			
	Personal Employment Details Details	Payment Details	Additional Information	Supporting Documents	Employer Representative
Q Create Case					
Case Enquiry	The (*) refers to a mandatory/require	red field.		Pensi	on Number: 961
• Reassign Cases					
Member Enquiry	Employer Code *	Employer Name *		Occupation Code	*
	000055	S A POLICE SERVICE	E	SAPS	٣
IN-PROGRESS		0		0	
		*		Service Terminati	on Date *
MR JAI	Commencement date: Period covered by pension contributions	1985-01-01		2019-08-31	
MR JAI	Commencement date: Period covered by pension contributions	1985-01-01 []		2019-08-31 []	
MR JAI	Commencement date: Period covered by pension contributions	1985-01-01 []		2019-08-31 [] Severance Packa	ge?*
MR JAI	Commencement date: Period covered by pension contributions Pension Retirement Age : (As per service conditions)	1985-01-01 [] *	•	2019-08-31 [] Severance Packay No   Yes	ge?*

#### > Verify salaries as per the documents you have.

		Sort
Period From*	Period To*	Annual Salary *
2019-04-01	2019-08-31	369876 + -
Period From*	Period To*	Annual Salary *
2018-04-01	2019-03-31	338994 + -
Period From*	Period To*	Annual Salary *
2017-04-01	2018-03-31	
Add Item(s) Bought service period to be recogn	sed	
Add Item(s)		

- Scroll down the page to the "Get Rules" button.
- > Click on "Get Rules" button and proceed to the "Reason for Termination" drop-down menu.
- Click type of exit as "Retirement: Early Retirement Service Conditions"
   Take note that the age of the applicant should be between 55 and 59 years.

Reason For Termination * Required		
Please Select		<ul> <li>Get Rules</li> </ul>
Please Select		
Retirement: Contract Expiry Retirement: Contract Expiry		
Retirement: Early Retirement Service Conditions		
Retirement: Early Retirement Service Conditions		
Pensionable Years		
0		
Exit Rule		
Exit Sub-Rule		
Total Dobt/Dopartment liability)	Dabé Dianués 🗐 🛙	
	Debt Dispute 🗆 []	
0		

- > The following screen will be shown.
- > Take note that you need to **tick** on the box marked Additional Liability, Early Retirement 2019 Dispensation and thereafter National Treasury.
- The screen will show with "Red writings" warning you to check if sufficient approval has been obtained and attached as proof"
- > Sufficient proof among others will include "Letter from Treasury accepting liability".
- > Take note further that the Exit Rule should be 14.3.1(b) as shown below.

Reason For Termination *			
Retirement: Early Retirement Service	e Conditions		▼ Get Rules
Age at Exit			
57	Additional Liability 🗹 []		
Early Retirement 2019 Dispensation	✓ []		
Debt / Liability Accrues To	National Treasury 🖲	Employer 🔍	
By ticking this box, the capturer ac reason selected for the employee a and rule 20 thereto. The employer	knowledges that he/she is aware that an ac is per the provisions of section 17(4) of the acknowledges that:	lditional financial liability may arise as a Government Employees Pension Law, I	result of the termination Proclamation 21 of 1996
the termination reason provided for the e	mployee is correct;		
sufficient approval has been obtained for	the selected termination reason and is attached a	is proof;	
the employer's officials have considered	and understand the implications of terminating the	employee with the selected termination reason	n.
Pensionable Years			
35			
Exit Rule			
14.3.1(b)			
Exit Sub-Rule			
14.3.3(a) + 14.2.1(a) + 14.2.1(b) + 14	4.2.1(c) + 14.2.6 + 14.2.2		
			Activate Windows
			Go to Settings to activate
Track Deliation and the Distance			

Early Retirement 2019 Dispensation 🗹 []			
Debt / Liability Accrues To	National Treasury 🖲	Employer 🔍	
By ticking this box, the capturer acknowl reason selected for the employee as per and rule 20 thereto. The employer ackno the termination reason provided for the employ sufficient approval has been obtained for the se the employer's officials have considered and un	edges that he/she is aware that an add the provisions of section 17(4) of the of wiedges that: ee is correct; elected termination reason and is attached as iderstand the implications of terminating the e	ditional financial liability may arise as a result of the termination Government Employees Pension Law, Proclamation 21 of 199 s proof, employee with the selected termination reason.	n <del>)</del> 6
Pensionable Years			
35			
Exit Rule			
14.3.1(b)			
Exit Sub-Rule			
14.3.3(a) + 14.2.1(a) + 14.2.1(b) + 14.2.1(b)	c) + 14.2.6 + 14.2.2		
Total Debt(Department liability)	Debt	t Dispute 🗏 [] Activate Windo	DWS
Employment Details Notes:		Go to Settings to act	tivate W

If there is no debt, scroll down and click "Proceed" on the bottom right of the page to go on "Payment Details" tab.

Total Debt(Department liability)	Debt Dispute 🗐 []
0	
Employment Details Notes:	
	<i>b</i>
Back	Proceed

	400
(14.3.3(d) + 14.2.1(d) + 14.2.1(d) + 14.2.1(d) + 14.2.1(d) + 14.2.0(d) + 14.	4.2.2
Total Debt(Department liability)	Debt Dispute 🗐 []
0	
Employment Details Notes:	

> Select method of payment from dropdown menu.

GEMENT	Z102 form details f	or JA				
	Personal Details	Employment Details	Payment Details	Additional Information	Supporting Documents	Employer Representative
e						
iry	The (*) refers t	to a mandatory/required	field.		Pens	ion Number: 96
ases						
luiry	lethod of paymen	nt (Applicant) *	- Please Select	- <b>v</b>		
	Payment Details	Notes:				
11/////						
					11	

	Z102 form details for	or JAI	7265			
Inbox	Personal Details	Employment Details	Payment Details	Additional Information	Supporting Documents	Employer Representative
Create Case						
Case Enquiry	The (*) refers to	o a mandatory/required	field.		Pensi	on Number: 96
Reassign Cases						
Member Enquiry	Method of paymen	t (Applicant) *	Please Select	•	1	
			Please Select			
PROGRESS	Payment Details	Notes:	International Bank Bank			
MR .						
	2					
					11	
						Activate Windows

Select the "Method of Payment (Applicant) field and choose the appropriate option.
 Complete the details of the bank account holder as per the bank form.

Member Enquiry	Method of payment (Applicant) *	Bank	•
PROGRESS	Banking Details:		
MR	Name of account holder *		
	Bank Name *	Branch Name *	
	Please Select	•	•
	0	0	
	Branch Code *	Account Number *	Account Type *
			Please Select V
	D	0	0
	Payment Details Notes:		

Scroll down and click "Proceed" to continue to the next tab "Additional Information".

Bank Name *	Branch Name *	
ABSA	ABSA GENERIC	T
0	0	
Branch Code *	Account Number *	Account Type *
632005		SAVINGS
0	0	D

- > Please note that this tab is shown because the exit is "Retirement".
- > You will be required to complete "Next of Kin" details as shown below, as per the documentation you have.
- You will also see "Medical Benefit Particulars" when scroll down the page.
- If member chooses to continue with the medical subsidy, documentary proof must be attached. You will then click on appropriate box for such.

GE your investment	PF your future					Tester Training~
	Z102 form details for	JA	5117265			
	Personal Details	Employment Details	Payment Details	Additional Information	Supporting Documents	Employer Representative
Q Create Case						
Case Enquiry	The (*) refers to a	i mandatory/required	l field.		Pens	ion Number:
Reassign Cases						
Member Enquiry	1. Next of Kin:					
IN-PROGRESS	Initials * Required		Last Name(Surna	me) * Required	First Name(s) * R	equired
	Next Of Kin Initials		Next Of Kin Las	t Name(Surname)	Next Of Kin Last	First Name(s)
	ID No. / Passport No.*	Required	Home Number		Cell Number * Re	quired
					Next Of Kin Cell	Number
	Address					Activate Windows Go to Settings to activate Window
	Street Name * Required	i -	Street Number		City * Required	11

Province/State * Required	Postcode * Required	Country *
Province/State	Postal Code	Please Select 🔻
Do you wish to add the second next of kin		
Medical Benefit Particulars:		
Does the member / spouse wish to continue with membership		
Additional Information Notes:		
_		Activate Windows
Back		Proceed

			2
Reassign Cases			
Member Enquiry	1. Next of Kin:		
IN-PROGRESS	Initials *	Last Name(Surname) *	First Name(s) *
	s		
	ID No. / Passport No.*	Home Number	Cell Number *
			404
	Address		
	Street Name *	Street Number	City *
	Bokenhout	69	Klerksdorp
	Province/State *	Postcode *	Country *
	North West	2570	South Africa 🔹
	Do you wish to add the second next of kin		
	Medical Benefit Particulars:		
	Does the member / spouse wish to continue with membership		Activate Windows Go to Settings to activate Wind

> You will notice that because the case is Retirement Enhanced Spouse the following screen will be shown.

Medical Reposit Particulares			
medical Benefit Particulars.			
Does the member / spouse wish to continue with membership			
NB: This Is A Enhanced Spouse Benefit			
To Proceed. Please Click On The Button	Below To Generate The ESP1 Choice Form.	*	
Additional Information Notes:			
		1	

- You will need to click on the Generate ESP1 and the form will be generated as shwon below and print it.
- > You will then fill Spouse details, if there are more than 4 Spouses duplicate this form.
- > Then attach the form to the package by uploading it as you did with other documents.
- GPAA will create a quotation and attach to the case send back to Employer for the member 's consideration, acceptance and return to GPAA for further processing.
- Note that where a request for quotation is required, the Retirement exit case will be held pending the return of signed/accepted quote from the member.

Pension Fu CHOICE RETIREMENT/	Employees nd (GEPF) FORM - DISCHARGE	Ö	GEI	PF USE ONI	LY - GEPF STA	MPS ESP1		
rivate Bag x63 Pre OUTH AFRICA 001	toria 34 Hamilt Arcadia	on Street Pretoria				Call C E-mail Websi	entre : 0800 117 669 l:enquiries@gepf.co.za te: www.gepf.co.za	1
	THIS FORM MU	JST ONLY	BE USED FO	OR RETIRE	MENT/DISCHAP	RGE AFTER 31	OCTOBER 2019.	
CHOICE This form must be iring member mus the member p	completed by an it indicate wheth asses away. In o	y member o er his or her rder to quali	of the GEPF w spouse(s) or ify for the high	ho becomes o life partner m her annuity, t	entitled to a mon nust receive a sta he member will r	thly annuity on i andard (50%) or eceive a reduce	retirement or exit fror enhanced (75%) spou d retirement gratuity	n the Fund. The use annuity, whe or annuity.
CHOICE This form must be iring member must the member p	completed by an it indicate wheth asses away. In o	y member o er his or her rder to quali OF MEMBI	of the GEPF wi spouse(s) or ify for the high	ho becomes o life partner n her annuity, t	entitled to a mon nust receive a sta he member will r Per	thly annuity on i andard (50%) or eceive a reduced ision Number	retirement or exit fror enhanced (75%) spot d retirement gratuity 97789806	n the Fund. The use annuity, whe or annuity.
CHOICE This form must be tring member mus the member p (A) PERSONAL F Sumame	completed by an at indicate whether asses away. In o PARTICULARS NGOBE	y member o er his or her rder to quali OF MEMBI	of the GEPF wi spouse(s) or ify for the high ER	ho becomes o life partner m her annuity, t	entitled to a mon nust receive a sta he member will r Per	thly annuity on I andard (50%) or eceive a reduce Ision Number	retirement or exit fror enhanced (75%) spot d retirement gratuity 97789806	n the Fund. The use annuity, whe or annuity.
CHOICE Inis form must be iring member mus the member p A) PERSONAL f Surname	completed by an it indicate wheth asses away. In o PARTICULARS NGOBE HERSLEY THO	y member o er his or her rder to quali OF MEMBI	of the GEPF wi spouse(s) or ify for the high ER	ho becomes ( life partner n ner annuity, t	entitled to a mon nust receive a st he member will r Per	thly annuity on I andard (50%) or - eceive a reduce Ision Number	retirement or exit fror enhanced (75%) spot d retirement gratuity 97789806	n the Fund. The use annuity, when or annuity.
CHOICE Inis form must be iring member must the member p A ) PERSONAL P Sumame First Name Initials	completed by an t indicate wheth asses away. In o PARTICULARS NGOBE HERSLEY THO HT	y member o er his or her rder to quali OF MEMBI KOZILE	of the GEPF will spouse(s) or ify for the high	ho becomes of life partner n ner annuity, t	entitled to a mon nust receive a str he member will r Per 1963-09-06	thly annuity on i andard (50%) or i eceive a reduced asion Number ID No	retirement or exit from enhanced (75%) spoud d retirement gratuity 97789806 6309060958088	n the Fund. The ise annuity, whe or annuity.

You will go to the bottom right part of the screen and click Proceed to go to Supporting documents tab.

Medical Benefit Particulars:	
Does the member / spouse wish to	
Additional Information Notes:	
_	_
Back	Proceed
	Medical Benefit Particulars: Does the member / spouse wish to continue with membership  Additional Information Notes: Back

- > You will then be presented with "Supporting Documents" tab, this should be completed according to all documents you have.
- More over there should be a Form/Letter from National Treasury or Employer acknowledging liability for the debt for this exit type.

	Z102 form details for	or J	117265			
a Inbox	Personal Details	Employment Details	Payment Details	Additional Information	Supporting Documents	Employer Representative
Create Case						
Case Enquiry	The (*) refers t	to a mandatory/required	field.		Pensio	on Number:
Reassign Cases						
Member Enquiry	Please tick the appro- supporting docume	opriate boxes below to nts in the sequence as i	ndicate that all the r ndicated on the che	equired supporting do klist.	cumentation will be attached	l. Please upload the
PROCRESS	An originally certifie	d copy of an ID (must b	e bar-coded) or Atta	ched Passport of the m	ambar avaantians oo nor	Attached
FROGRESS ////	ID Boliov		e sur ooueu, or Atta	ched i assport of the h	lember – exceptions as per	Attached
	ID Policy.			ched r assport of the fi	iember – exceptions as per	Yes® No
MR .	ID Policy.	Bank Particulars Form	(Z894) or for actuar	ial transfer to an appro	ved external retirement fund	Yes® No
MR	ID Policy. Duly completed ACE a duly completed Z1	B Bank Particulars Form 1525 form with Particula	(Z894) or for actuar rs of approved exter	ial transfer to an appro nal retirement fund for	ved external retirement fund transfer of funds.	Yes® No Yes® No
MR	ID Policy. Duly completed ACE a duly completed Z1 Originally certified c	B Bank Particulars Form 1625 form with Particula copies of documentation	I (Z894) or for actuar rs of approved exter	ial transfer to an appro nal retirement fund for ent:	ved external retirement func transfer of funds.	Yes® No Attached Yes® No Attached
MR	ID Policy. Duly completed ACE a duly completed Z1 Originally certified c	B Bank Particulars Form 1525 form with Particula copies of documentation	(Z894) or for actuar rs of approved exter for proof of retirem	ial transfer to an appro nal retirement fund for ent:	ved external retirement fund transfer of funds.	Attached Yes® No© Attached Yes® No© Attached Yes® No©
MR.	ID Policy. Duly completed ACE a duly completed Z1 Originally certified c Proof of termination	B Bank Particulars Form 625 form with Particula copies of documentation of service is required s	I (Z894) or for actuar rs of approved exter I for proof of retirem Uch as a printout of	ial transfer to an appro nal retirement fund for ent: the Service Attached T	ved external retirement fund transfer of funds. emination or Service Recor	Attached Yes® No Attached Yes® No Attached Yes® No d Attached
MR.	ID Policy. Duly completed ACE a duly completed Z1 Originally certified c Proof of termination from PERSAL statin the last day of servi-	B Bank Particulars Form 625 form with Particula copies of documentation of service is required s g the Payroll No (PERS, ce of the member.	(Z894) or for actuar rs of approved exter n for proof of retirem uch as a printout of AL No), Withdrawal r	ial transfer to an appro nal retirement fund for ent: the Service Attached T eason, Withdrawal date	ved external retirement fund transfer of funds. ermination or Service Recor e, Salary level and notch on	Attached Yes® No© I Attached Yes® No© Attached Yes® No© d Attached Activate No©

Proof of termination of service is required such as a printout of the Service Attached Termination or Service Recc from PERSAL stating the Payroll No (PERSAL No), Withdrawal reason, Withdrawal date, Salary level and notch of the last day of service of the member.	n Yes No
Conditional: for early retirement a copy of letter of approval for early retirement signed by the Head of Departmer	nt. Attached Yes® No©
Conditional: for retirement of a Director-General: a copy of the service contract(s).	Attached Yes <sup>©</sup> No <sup>©</sup>
Conditional: for service contract(s) expiring: a copy of the service contract(s).	Attached Yes〇 No〇
Conditional: For debt deduction: An originally certified copy of a Court Order or Member⊡s approval in writing fo debt due to Negligence, Misconduct or Theft as per GEP Law □ Section 21.3(c) or in respect of debt for more tha the value of R10,000.	or Attached <sup>1</sup> Yes No
Conditional: for members with more than 10 years of pensionable service: Duly completed GEPF Spouse Choice form where a once-off irrevocable choice is made for future pension for a widow upon the death of the member (even if the member is not currently married).	Attached Yes No
Duly completed Updating Personal Particulars of Member Form (Z864).	Attached Yes No Activate Windows
Conditional: When a marriage is registered an originally certified copy of the marriage certificate is required or	Go to Settings to activate W Attached

debt due to Negligence, Misconduct or Theft as per GEP Law □ Section 21.3(c) or in respect of debt for more than the value of R10,000.	Yes No
Conditional: for members with more than 10 years of pensionable service: Duly completed GEPF Spouse Choice form where a once-off irrevocable choice is made for future pension for a widow upon the death of the member (even if the member is not currently married).	Attached Yes No
Duly completed Updating Personal Particulars of Member Form (Z864).	Attached Yes No
Conditional: When a marriage is registered an originally certified copy of the marriage certificate is required or alternatively the required affidavit(s) for consideration. For a Life Partnership: affidavits setting out the nature of the relationship and indicators (preferably with supporting documentation), of that relationship from a member of each party's family, a joint friend and/or an authorised member of any organisation, institution or society of which one or both parties has been a member.	Attached Yes No
Conditional: Where the member had a previous marriage, an originally certified copy of the former spouse⊡s ID (must be bar-coded) or Passport, Marriage Certificate, Death Certificate, Settlement Agreement and/or Decree of Divorce are needed. Where payments are due to an ex-spouse, an ACB Bank Particulars Form(Z894) is needed. Divorce Settlement Agreements for the division of pension interest are only effective from 1 August 1989 as per the amendment to the Divorce Act and a separate Withdrawal from Fund Form(Z102) completed by the employer is needed.	Attached Yes No
Originally certified copies of the member's last two salary advices printed from the payroll system.	Attached Yes No
Conditional: For when the Commencement Date (Service Date) is amended, then proof of contributing service is needed in the form of a copy of an appointment advice to the salary department, salary / leave record, staff record,Actir pay slips, or IRP 5 tax certificates for the applicable years. A duly completed Membership Update Form (Z125) is Go to also required.	Attached Yes Woodows Settings to activate Windo

Note on the following screen that the button indicating "A signed Form/Letter from Treasury or employer acknowledging liability for debt" should be ticked as the letter will be indicating approval as required.

An originally certified copy of the existing medical scheme Membership Certificate (and new Membershi Certificate for medical scheme transfers) of the contributing member that is registered as the main medi member.	ip a) Attached ical scheme Yes No
Conditional: An affidavit or an originally certified copy of the service records to prove additional periods government service that need to be added for medical subsidy purposes to prove 10 or 15 years of gove service.	s of broken Attached ernment Yes No
Conditional: For a contributing member, pensioner or spouse that choose a gratuity payment, a duly con Updating Bank Particulars Form - Z894.	mpleted Attached Yes No
A duly completed State Subsidised Medical Contribution Choice Form to choose between continued me (4/6 GEPF subsidised) or the payment of an once-off gratuity.	mberships Attached Yes No
A signed Form/Letter from National Treasury or employer acknowledging liability for debt	Attached Yes® No©
Document Management	
Uploaded documents must be pdf format, not be bigger than 5mb and you are not allowed to upload     Multiple Document Uploader     Choose Files No file chosen	more than 20 files.
Supporting Documents Notes:	Activate Windows Go to Settings to activate W

UPLOAD QUEUE				
Files in Queue: 5				
Name	Size	Progress	Status	Actions
ERWRPB_18_06_2019.pdf	0.05 MB		~	🖲 Upload 📔 View PDF 💼 Rei
ER - Draft Generic Management Plan (2).pdf	0.27 MB		~	🖲 Upload 📔 View PDF 🛍 Rei
Circular and Guideline on Managing Early Retirement without penalisation of pension benefits in terms of section 16(6) of the Public Service Act 1994 (4).pdf	0.89 MB		*	⊙ Upload È View PDF 💼 Rei
EB Withdrawals - level 3 processes_draft_v0.1.pdf	0.50 MB		~	🖲 Upload 📔 View PDF 💼 Rei
Furniture Office Specs.pdf	0.36 MB		*	🖲 Upload 🖺 View PDF 🛍 Re
Queue progress:				
€ Upload all				
Supporting Documents Notes:				

> Scroll down if satisfied and click "Proceed" button

Queue progress.	
Supporting Documents Notes:	
Back	Proceed

- > You will then be presented with the "Employer Representative" tab.
- Because the system recognizes you by User-id, it will populate your details.
   Verify them and you can click "Submit Application" button

<ul> <li>Reassign Cases</li> <li>Member Enquiry</li> </ul>	WARNING: DOHA REQUESTED WARNING: DOHA PASSED Case Created By								
IN-PROGRESS	Full Name Tester Training	Designation	Tel No						
	Fax No.	E-mail tester302@gpaa.gov.za							
EMPLOYER DOCUMENTS	Postal Address	City	Postal Code						
<b>bss 4 - request 30</b> training computers.pdf	34 hamilton,arcadia,Pretoria,South Africa		0001						
<ul> <li>furniture office specs.pdf</li> <li>eb withdrawals - level 3 processes_draft_v0.1.pdf</li> <li>circular and guideline on managing early retirement</li> </ul>	Back VIEW Z102		Submit Application						

> You will then be presented with the below screen, if satisfied you can continue by clicking "Proceed" button.

<ul> <li>Reassign Cas</li> <li>MR </li> <li>■ Member Enqu</li> </ul>		65
IN-PROGRESS	<ul> <li>Image: A start of the start of</li></ul>	
MR JAI ERASI	ave chosen to send this application to the Employer Verifier for approval. Do you want to continue?	
EMPLOYER DOC	Cancel Proceed	
training compute	Back VIEW Z102	Submit Applicat
eb withdrawals - level 3 processes_draft_v0.1.pdf		
<ul> <li>circular and guideline on managing early retirement without penalisation of</li> </ul>		

# 6.3 DISCHARGE

The Capturer creates a case and will then select the relevant "Type of Exit". In this instance it will be "Discharge"

your investment, you	PF r future			🙎 Andiswa Maila
	TYPE OF EXIT			
Q Create Case	PLEASE SELECT	*		
Lase Enquiry	PLEASE SELECT RETIREMENT RESIGNATION			
	DISCHARGE DEATH_IN_SERVICE			

Service termination dates will be selected according to the documents at hand.

GEPF your investment, your future									
	TY	PE OF	EXIT						
Q Create Case		DISCH	IARGE				,	-	
Case Enquiry		SE	RVICE	TERMIN	IATIO	)n dat	TE		
	Y	(YYY-I	MM-D	)			<b></b>		
	-	۱.		Mar	ch 201	17			>
		M	on Tu	e Wee	d Th	hu F	ri S	at S	un
		9 2	7 2	8 01	02	2 0	13 (	04 (	05
	1	0 0	6 0	7 08	09	9 1	0 .	11 ·	12
	1	7 1	3 1	4 15	16	6 1	7	18	19
	1	2 2	0 2	1 22	23	3 2	4 :	25 :	26
	1	3 2	7 2	8 29	30	0 3	1	01 (	)2
	1	4 0	3 0	4 05	06	6 0	17 (	8	)9
		Today	Cle	ar				Close	

- The "Search" can be done according to the available information e.g. ID, Passport, and Member Number.
- > Load the relevant information and click the "Submit" button.
- > After viewing the "Results" of the search, click the "Select" button

2017-03-31									
SEARCH									
ID Number	Passport Nu	mber Membe	er Numbe	e <b>r</b> Em	ployee Number	Personal [	Details		
Me	mber Number	685							
		Submit							
Results									
	Passport	Member			Name &		Start	Termination	
ID Number	Number	Number	Title	Initials	Surname	Gender	Date	Date	
205083		5685	MR	A		MALE	1996- 05-01	2017-02-28	SELECT

> Verify the member personal details and fill-in the "Required" fields.

	Personal Details	Employment Details	Payment Details	Additional Information	Supporting Documents	Employer Representative
Q Create Case	The (*) refers to	a mandatory/required fiel	ld.		Per	ision Number: 685
	Persal Number *		Current Pension Nu	ımber *	Pre-amalgamatio	n Number
IN-PROGRESS	Title *		Initials *		Last Name(Surna	me) *
	MR First Name(s) *		A Gender *		RTS	
	Анам		MALE	,		
	Maiden Name		ID number [205083]		Passport Number	
	Date Of Birth *		Marital Status *		Is there a divorce	court order issued?
	1963-00-12 Income Tax No*		DIVORCED		Cell Number *	
	44074		6229902 0		19037	
	Email Address					
	Email Address					
	Residential Address					
	Street Name *		Street Number		City * Required	

Scroll down the page and click on the green "Start Application" button to go to next tab which is the 'Employment Details".

GRAHAMSTOWN		Grahamstown
Complex Name	Complex Number	
Province/State *	Postcode *	Country *
Eastern Cape	0400	South Africa 🔻
s the Postal Address same as the Postal Address	Residential Address? No 🔍 Yes 🖲	
P.O Box	Suburb	City *
ROAD	GRAHAMSTOWN	GRAHAMSTOWN
Province/State *	Postcode *	Country *
Province/State	6139	South Africa 🔻
Personal Details Notes:		
		~

> Verify the "Employment Details" tab

CASE MANAGEMENT	Z IUZ form details to		01702201804120			
	Personal Details	Employment Details	Payment Details	Additional Information	Supporting Documents	Employer Representative
Q Create Case						
Case Enquiry	The (*) refers to	a mandatory/required	field.		Pen	sion Number: 5685
	Employer Code *		Employer Name *		Occupation Code	*
7777777777777	000055		SOUTH AFRICAN	POLICE SERVICE	SAPS	•
IN-PROGRESS	0		0		0	
			*		Service Terminati	on Date *
🖹 MR A 💭 🔤	Commencement date: Period covered by per	sion contributions	1982-02-08	î	2017-03-31	<b>iii</b>
			0		D	
			*			
	Pension Retirement A (As per service condit	ge : ions)	60		T	
	Annual pensionable sa salary values, please t 50 cents up. Example	alary reflecting the incr round to the nearest rans is : (1) R535435.40 rou	rease periods during last th nd value. When completing nd down to R535,435 (2) R	ree (3) years or whole salaries, please round 535435.60 round up to	period if shorter. Please d l down from 49 cents dowr o R535,436	o not capture cents in the wards and round up from
	Period From*		Period To*		Annual Salary *	Sort
	2016-04-01	<b></b>	2017-03-31	<b></b>	295263	+ -
	Period From*		Period To*		Annual Salary *	
	2015-07-01	<b>m</b>	2016-03-31	<b>m</b>	274407	+ -

- > If there is no "Bought Service" and "Break in Service" go to the "Get Rules" button and click on it. It will take you to the "Reason for Termination" drop-down menu.
  Select the relevant "Discharge" according to the documents you have e.g. "Discharge III
- Health Retirement".

Period From^	Period To*	Annual Salary *	
2015-04-01	2015-06-30	263850	+ -
Period From*	Period To*	Annual Salary *	
2014-04-01	2015-03-31	246588	+ -
Add Item(s)			
Bought service period to be reco	gnised		
Add Itom(c)			
Add Item(s)			
S 1 1 1 1 1 1 1			
Break in service period to be dis	regarded		
Break in service period to be dis.	regarded		
Break in service period to be dis	regarded		
ireak in service period to be dis Add Item(s) Reason For Termination * Requir	regarded		
Add Item(s)	regarded		▼ Get Rules
reak in service period to be dis Add Item(s) eason For Termination * Requir Please Select Please Select	regarded red		▼ Get Rules
Add Item(s)  Add I	regarded red		• Get Rules
Add Item(s)  Reason For Termination * Requir  Please Select -  Please Select -  Discharge: Abolition of Post Discharge: Ill Health Retirement	regarded red		• Get Rules
Add Item(s)  Add Item(s)  teason For Termination * Requir  Please Select -  Please Select -  Discharge: Abolition of Post Discharge: Ill Health Retiremen Discharge: Ill Health Retiremen Discharge: Incapable Discharge: Incapable Discharge: Discharge Discharge: Disc	regarded red		v Get Rules
Add Item(s) Reason For Termination * Requir - Please Select - Discharge: Abolition of Post Discharge: Il Health Retirement Discharge: Il Health Retirement Discharge: Il Health Retirement Discharge: Il Abolition of Post Discharge: Injury on Duty Discharge: Presidential About Abolition Abolition Abolition 	regarded red		• Get Rules
Add Item(s)  Reason For Termination * Requir  Please Select -  Please Select -  Discharge: Abolition of Post Discharge: In Health Retiremen Discharge: Incapable Discharge: Incapable Discharge: Presidential Appoin Discharge: Premote efficiency	regarded red		• Get Rules
Add Item(s)  Reason For Termination * Requir  Please Select -  Please Select -  Discharge: Abolition of Post Discharge: III Health Retirement Discharge: III Health Retirement Discharge: Incapable Discharge: Presidential Appoin Discharge: Presidential Appoin Discharge: Promote efficiency Survey	regarded red nt		Get Rules
Add Item(s)  Reason For Termination * Requir  Please Select -  Please Select -  Discharge: Abolition of Post Discharge: III Health Retirement Discharge: Incapable Discharge: Incapable Discharge: Presidential Appoin Discharge: Promote efficiency XIT NUME	regarded		Get Rules

- After selecting the relevant "Reason for Termination", the following will be populated: "Age at Exit", "Pensionable Years", "Exit Rule" and "Exit Sub-Rule"
   If there is no "Departmental Debt" go to the "Proceed" button in order to go to next tab
- which is the "Payment Details" tab.

Break in service period to be disregarded			
Add Item(s)			
Reason For Termination *			
Discharge: Ill Health Retirement		▼ Get	t Rules
Age at Exit			
53			
Pensionable Years			
35			
Exit Rule			
14.1.1(a)			
Exit Sub-Rule			
14.2.1(a) + 14.2.1(b) + 14.2.1(c) + 14.2.6 + 14.2.4(a) + 14.2.	.4(b)(i)(AA) + 14.2.2		
Total Debt(Department liability)	Debt Dispute 🔲 []		
U			
Employment Details Notes:			

Select the "Method of Payment" as per the choice of the member e.g. "Bank".
 Insert the "Name of the Bankholder" and select "Bank Name" from drop-down menu.

GE your investment	PF , your future					🞴 Andiswa Maila
CASE MANAGEMENT	Z102 form details fo	or A WT201	1702:1854120			
Inbox	Personal Details	Employment Details	Payment Details	Additional Information	Supporting Documents	Employer Representative
Q Create Case						
Case Enquiry	The (*) refers to	a mandatory/required fi	eld.		Per	nsion Number: 685
	Method of payment	(Applicant) *	Bank		•	
IN-PROGRESS	Banking Details:		- Please Select International Bank Bank			
MR A	Name of account ho	lder *				
	Bank Name *		Branch Name *			
	- Please Select -	•			·	
	U		U			
	Branch Code *		Account Number *		Account Type *	
			1206433300		- Please Select	- •
	0		0		0	

- Other fields like "Branch Code" and "Account Number" may be populated according to the information the GPAA has.
- Select the "Account Type" from the drop-down menu according to the documents you have and click the "Proceed" button to go to the next tab which is the "Additional Information" tab.

IN-PROGRESS	Banking Details:		
MR A	Name of account holder *		
	Bank Name *	Branch Name *	
	ABSA	ABSA GENERIC *	
	0	0	
	Branch Code *	Account Number *	Account Type *
	032005	<b>1</b>	SAVINGS
	Payment Details Notes:		
	_		
	Back		Proceed

> Fill-in the "Additional Information" fields as shown below.

CASE MANAGEMENT	Z102 form details fo	or A WT20	1702251854120			
Inbox	Personal Details	Employment Details	Payment Details	Additional Information	Supporting Documents	Employer Representative
Q Create Case						
Case Enquiry	The (*) refers to	a mandatory/required f	leia.		Pens	ion Number85
	1. Next of Kin:					
N-PROGRESS	Initials *		Last Name(Sumar	ne) *	First Name(s) *	
<u> </u>	Т		Makhetha		Tshediso	
MR A	ID No. / Passport No.		Home Number		Cell Number *	
	35236088		Next Of Kin Hom	ne Number	460	
	Address					
	Street Name *		Street Number		City *	
	45 Maine Street		Next Of Kin Stree	et Number	Bloemfontein	
	Province/State *		Postcode *		Country *	
	Free State		9300		South Africa	•
	Do you wish to add the	e second next of kin				

If the member chooses to continue with the "Medical Benefits" subsidy, tick the box and the medical fields will be reflected.

- > Fill-in the "Medical Benefits" fields according to the documents you have.
- "Total Years in Service" should also be filled.
- Go to the green "Proceed" button in order to go to the next tab which is "Supporting Documents".

Medical Benefit Particulars:		
Does the member / spouse wish to continue with membership	×	
Scheme Name *	Scheme Membership Number*	Scheme Package Option *
GEMS	9999999999999999	Medibonus
Total Years in Service *	Did State Contribute to member subsidy* 🗹	State Contribution Amount*
16		1401.33
Back		Proceed

> The following tab will be treated like in the Resignation Cases above.

ASE MANAGEMENT	2 IU2 form details for	or A WT201	/02251854120			
Inbox	Personal Details	Employment Details	Payment Details	Additional Information	Supporting Documents	Employer Representative
Create Case				-		
Case Enquiry	The (*) refers to	a mandatory/required fi	eld.		Pensi	on Number: 68
	Please tick the approp documents in the seq	priate boxes below to indi uence as indicated on the	cate that all the require checklist.	ed supporting documentat	tion will be attached. Please	e upload the supportin
PROGRESS	An originally certified Policy.	copy of an ID (must be ba	ar-coded) or Attached	Passport of the member -	exceptions as per ID	Attached Yes® No⊙
	Duly completed ACB I completed Z1525 for	Bank Particulars Form (Z8 n with Particulars of appr	394) or for actuarial tra roved external retireme	unsfer to an approved exte ent fund for transfer of fun	rnal retirement fund a duly ds.	Attached Yes® No⊖
	Proof of termination of PERSAL stating the P service of the membe	of service is required such ayroll No (PERSAL No), W r.	n as a printout of the So /ithdrawal reason, With	ervice Attached Terminati drawal date, Salary level a	on or Service Record from and notch on the last day of	Attached Yes® No
	Conditional: for early	retirement a copy of lette	r of approval for early	retirement signed by the H	lead of Department.	Attached Yes <sup>©</sup> No®
	Conditional: for retire	ment of a Director-Genera	al: a copy of the servic	e contract(s).		Attached Yes◯ No◯
	Conditional: for service	e contract(s) expiring: a	copy of the service co	ntract(s).		Attached

Conditional: for debt deduction: An originally certified copy of a Court Order or Member's approval in writing for debt due						
to negligence, misconduct or theft as per GEP law – Section 21.3© or in respect of debt for more than the value of R10,000.	Attached Yes No®					
Conditional: for members with more than 10 years of pensionable service: Duly completed GEPF Spouse Choice form where a once-off irrevocable choice is made for future pension for a widow upon the death of the member (even if the member is not currently married).	Attached Yes® No©					
Duly completed Updating Personal Particulars of Member Form (Z864).	Attached Yes® No©					
Conditional: When a marriage is registered an ariginally cartified eany of the marriage partificate is required as	Attached					
alternatively the required affidavit(s) for consideration. For a Life Partnership: affidavits setting out the nature of the relationship and indicators (preferably with supporting documentation), of that relationship from a member of each party's family, a joint friend and/or an authorised member of any organisation, institution or society of which one or both parties has been a member.	Yes No®					
Conditional: Where the member had a previous marriage, an originally certified copy of the former spouse's ID (must be bar-coded) or Passport, Marriage Certificate, Death Certificate, Settlement Agreement and/or Decree of Divorce are needed. Where payments are due to an ex-spouse, an ACB Bank Particulars Form (Z894) is needed. Divorce Settlement Agreements for the division of pension interest are only effective from 1 August 1989 as per the amendment to the Divorce Act1 and a separate Withdrawal from Fund Form (Z102) completed by the employer is needed.	Attached Yes⊙ No®					
Originally certified copies of the member's last two salary advices printed from the payroll system.	Attached Yes® No◯					
Conditional: For when the Commencement Date (Service Date) is amended, then proof of contributing service is needed in the form of a copy of an appointment advice to the salary department, salary / leave record, staff record, pay slips, or IRP 5 tax certificates for the applicable years. A duly completed Membership Update Form (Z125) is also required.	Attached Yes○ No®					
Conditional: For when the surname of the person is different to the surname on the ID or Passport documents, a letter from the Department of Home Affairs or Full Birth Certificate of a child is required to confirm the surname.	Attached Yes© No®					
An avisingly cartified easy of the sylating medical scheme Membership Cartificate (and new Membership a) Cartificate	Attached					
An orginally certified copy of the existing medical scheme wembership Certificate (and new wembership a) Certificate for medical scheme transfers) of the contributing member that is registered as the main medical scheme member.	Yes <sup>®</sup> No					
Conditional: An affidavit or an originally certified copy of the service records to prove additional periods of broken	Attached					
government service that need to be added for medical subsidy purposes to prove 10 or 15 years of government servic	ce. Yes No®					
government service that need to be added for medical subsidy purposes to prove 10 or 15 years of government servic Conditional: For a contributing member, pensioner or spouse that choose a gratuity payment, a duly completed Updati Bank Particulars Form - Z894.	re. Yes No® ing Attached Yes® No					
government service that need to be added for medical subsidy purposes to prove 10 or 15 years of government servic Conditional: For a contributing member, pensioner or spouse that choose a gratuity payment, a duly completed Updati Bank Particulars Form - Z894. A duly completed State Subsidised Medical Contribution Choice Form to choose between continued memberships (4/ GEPF subsidised) or the payment of an once-off gratuity.	ce. Yes No® ing Attached Yes® No /6 Attached Yes® No					
government service that need to be added for medical subsidy purposes to prove 10 or 15 years of government servic Conditional: For a contributing member, pensioner or spouse that choose a gratuity payment, a duly completed Updati Bank Particulars Form - Z894. A duly completed State Subsidised Medical Contribution Choice Form to choose between continued memberships (4/ GEPF subsidised) or the payment of an once-off gratuity. Document Management	ce. Yes No® ing Attached Yes® No /6 Attached Yes® No					
government service that need to be added for medical subsidy purposes to prove 10 or 15 years of government servic Conditional: For a contributing member, pensioner or spouse that choose a gratuity payment, a duly completed Updati Bank Particulars Form - Z894. A duly completed State Subsidised Medical Contribution Choice Form to choose between continued memberships (4/ GEPF subsidised) or the payment of an once-off gratuity. <b>Document Management Output</b> Uploaded documents must be pdf format and not be bigger than 5mb.	ce. Yes No® ing Attached Yes® No /6 Attached Yes® No					
government service that need to be added for medical subsidy purposes to prove 10 or 15 years of government servic Conditional: For a contributing member, pensioner or spouse that choose a gratuity payment, a duly completed Updati Bank Particulars Form - Z894. A duly completed State Subsidised Medical Contribution Choice Form to choose between continued memberships (4/ GEPF subsidised) or the payment of an once-off gratuity. Document Management Uploaded documents must be pdf format and not be bigger than 5mb. Multiple Document Uploader Choose Files No file chosen	ce. Yes No® ing Attached Yes® No /6 Attached Yes® No					
government service that need to be added for medical subsidy purposes to prove 10 or 15 years of government servic Conditional: For a contributing member, pensioner or spouse that choose a gratuity payment, a duly completed Updati Bank Particulars Form - Z894. A duly completed State Subsidised Medical Contribution Choice Form to choose between continued memberships (4/ GEPF subsidised) or the payment of an once-off gratuity. Document Management Uploaded documents must be pdf format and not be bigger than 5mb. Multiple Document Uploader Choose Files No file chosen Supporting Documents Notes:	ce. Yes No® ing Attached Yes® No /6 Attached Yes® No					
government service that need to be added for medical subsidy purposes to prove 10 or 15 years of government service Conditional: For a contributing member, pensioner or spouse that choose a gratuity payment, a duly completed Updati Bank Particulars Form - Z894. A duly completed State Subsidised Medical Contribution Choice Form to choose between continued memberships (4/ GEPF subsidised) or the payment of an once-off gratuity. Document Management Uploaded documents must be pdf format and not be bigger than 5mb. Multiple Document Uploader Choose Files No file chosen Supporting Documents Notes:	ce. Yes No®					
Open	A			a second last		_
---------------------	---	---------------------------------------	-------------------	--------------------	--	----------------------------------
🕥 🕖 🕌 « Thabiso Sto	efane 2009 + FTC 2010 and 11 + Personal + T	GS Docs + + + Search TGS I	Docs p			
ganize 👻 New folder			H • [] @			
- Envoriter	Documents library		le	service records to	prove additional periods of broken	Attached
Desktop	TGS Docs	Arran	ge by: Folder 🔻 😽	ay purposes to pro	ve 10 or 15 years of government service.	Yes No
🔒 Downloads	Name	Date modified	Туре			
Recent Places	2015	2/26/2015 3:38 PM	File folder	that choose a gra	uity payment, a duly completed Updating	Attached
🖥 Libraries	2016	7/27/2016 1:03 PM	File folder			Yes No
Documents	Applications	11/28/2016 2:28 PM	A File folder			
Music     Dicturer	Certificates	11/28/2016 1:58 PM	A File folder	pice Form to choos	e between continued memberships (4/6	Attached
Videos	📕 cv	2/10/2017 10:40 AM	/ File folder			Yes <sup>®</sup> No <sup>©</sup>
	Security Clearance	7/27/2016 1:03 PM 8/6/2010 2:39 PM	File folder			
Computer	Acknoy Type: Adobe Accobat Document	/ment 8/3/2010 9:29 AM	Adobe Acrobat D			
🙀 mainframe (\\gp 👻	Size: 108 KB					
File nar	me:	✓ All Files	•	1000		
		Open	Cancel	jer than 5mb.		
			fi	le chosen		
1100000000						
	1.1.116.21511.1218	Supporting Documents Notes:				
	191199111111					
	19344484344444					
	199719941993					
					~ ~ ~	
	1.5777577747778					
		Back				Proceed
Files in Queu	e: 1					
				-		
Name			Size Progre	ess Status	Actions	
1400 Liser	nce.pdf		0.11 MB	· ·	① Upload Le View PDF C Remov	
Queue progre	988:					
Qualand	-11					
Upload a						
Cumpertin	- Decumento Notes					
Supporting	g Documents Notes:					
						2
					1	
1						
Back					Proceed	
	J					
1.						

<b>Document Management</b>					
boounione management					
Uploaded documents must be pdf	format and not be bigger than 5mb.				
Multiple Document Uploader	Choose Files No file chosen				
UPLOAD QUEUE					
Files in Queue: 1					
Name		Size	Progress	Status	Actions
1400 Lisence.pdf		0.11 MB		~	⑦ Upload
Queue progress:					
① Upload all					
Supporting Documents Notes:					
Back					Proceed

- After clicking "Proceed" the next tab will be the "Employer Representative" tab.
   This tab will also be treated like in the Resignation cases above.

/@ Inbox	Personal Details	Employment Details	Payment Details	Additional Information	Supporting Documents	Employer Representative
Q Create Case						
Lase Enquiry	The (*) refers to a	a mandatory/required fie	ld.			Pension Number: 5685
	Case Created By					
	Full Name		Designation		Tel No	
	Andiswa Maila		Capturer		012219232	3
IN-PROGRESS	Fax No.		E-mail			
	01221231231		tester1@gpaa.g	ov.za		
///////////////////////////////////////	Postal Address	Suburb		City		Country
	34 Hamilton street	Arcadia	I	Pretoria		South Africa
	Postal Code					
	0001					
	Back View 2	102				Submit Application

	MR A	WT2017022 51854120	pporting Employer puments Representative
Create Case     Case Enquiry	O Th Case Cri Full Nam		Pension Number: 5685
IN-PROGRESS	Andiso     You have chosen to send this application to the Employ Do you want to continue?       Fax No.     01221	<b>/er Verifier for approval.</b> Cancel <b>Proceed</b>	0122192323
	Postal A 34 Hamilton street Arcadia Postal Code 0001 Back View Z102	Pretoria	Country South Africa Submit Application

## 6.4 DEATH IN SERVICE

- > The Capturer creates a case and will select the relevant "Type of Exit".
- In this instance it will be "Death in Service" as shown below.

CASE MANAGEMENT	TYPE OF EXIT			TYPE OF APPLIC	ATION	
Create Case     Case Enquiry	DEATH_IN_SERVICE •	Estate 🗆	Spouse	Life Partner 🔲	Dependant 🗌	Nominee

- You will notice that after clicking "Death in Service" as the type of exit, the "Type of Application" screen" will be reflected and a selection then needs to be indicated by clicking the relevant "Type of Application" e.g. "Spouse", "Dependent".
- > The "Service Termination date" will be selected accordingly.
- Any "Search" criteria can be selected e.g. "ID Number", "Passport Number", "Member Number" as shown below.

GEF your investment, yo	n forure	iswa Maila∨
CASE MANAGEMENT	TYPE OF EXIT     TYPE OF APPLICATION       DEATH_IN_SERVICE     *     Estate     Spouse @     Life Partner     Dependant     Nominee	
Case Enquiry	2017-02-28	
	SEARCH ID Number Passport Number Member Number Employee Number Personal Details Member Number	
	Submit	

- > Click the "Submit" green button to continue.
- > Click on the "Select" button to continue after viewing the "Results" of your search.

ID Number Passport Number Member Number Employee Number Personal Details Member Number	
Member Number	
Submit	
Results	

- > You will then be taken to the "Personal Details" tab.
- > This must be treated like the Resignation cases above.

			1111111111					
CASE MANAGEMENT	Personal Details	Employment Details	Dependants Details	Applicant Details	Payment Details	Supporting Documents	Employer Representative	
Q Create Case	The (*) refers	to a mandatory/required	field.			Pensio	n Number:	
	Persal Number *		Current Pensi	on Number *		Pre-amalgamation N	umber	
IN-PROGRESS	Title *		Initials *			Last Name(Surname	*	
	MR	Ŧ	ET					
MR ET	First Name(s) *		Gender *					
			MALE		•			
	Maiden Name		ID number			Passport Number		
Date Of Birth *			Marital Status *			Is there a divorce court order issue		
	1900-02-17		MARRIED		•	o-ll N-share David		
				r		Cell Number ^ Requir	ea	
21 Mainet Street					Pretori	а		
Complex Name		Complex Nu	mber				5	
Province/State *		Postcode *	Postcode *			Country *		
Gauteng		0185			South	Africa	•	
Is the Postal Address s	ame as the Reside	ntial Address?	No Ves	۲				
Postal Address								
P.O Box		Suburb			City *			
POSBUS		SINOVILLE			SINOV	ILLE		
Province/State *		Postoodo *			Country	*		
Province/State		Postal Cod	stcode *			South Africa		
Trovince, otate					ooddii	Ainea		
Personal Details Note	es:						5	
					/i			
Cancel						Start	Application	

If satisfied, click the "Start Application" button to go to the next tab which is "Employment Details"

Personal Details	Employment Details	Dependants	Applicant	Paymont	Supporting	Employer
		Details	Details	Details	Documents	Representative
The (*) refers	to a mandatory/require	ed field.			Pension	n Number:
Employer Code *		Employer Na	me *		Occupation Code *	
000055		SOUTH AF	RICAN POLICE SER	/ICE	SAPS	
0		0			0	
Commencement date: Period covered by pension contributions		*	*			Date *
		1984-02-06	1984-02-06			<b>m</b>
		0			0	
		*				
Pension Retirement	t Age :	60		•		
(As per service conditions)		0				
Annual pensionable salary values, pleas 50 cents up. Exam	e salary reflecting the in se round to the nearest ples : (1) R535435.40 ro	crease periods during rand value. When com ound down to R535,43	g last three (3) years pleting salaries, plo 35 (2) R535435.60 r	s or whole period ease round down ound up to R535	l if shorter. Please do no from 49 cents downwa ,436	ot capture cents in the rds and round up from
	Employer Code * 000055 1 Commencement de Period covered by p Pension Retiremen (As per service con Annual pensionable salary values, pleas 50 cents up. Exam	Employer Code * 000055 1 Commencement date: Period covered by pension contributions Pension Retirement Age : (As per service conditions) Annual pensionable salary reflecting the ir alary values, please round to the nearest 50 cents up. Examples : (1) R535435.40 r	Employer Code * Employer Na 000055  Commencement date: Period covered by pension contributions Pension Retirement Age : (As per service conditions) Annual pensionable salary reflecting the increase periods during salary values, please round to the nearest rand value. When con S0 cents up. Examples : (1) R535435.40 round down to R535.43	Employer Code * Employer Name *          000055       SOUTH AFRICAN POLICE SERV         0       0	Employer Code * Employer Name *          000055       SOUTH AFRICAN POLICE SERVICE         0       0         0       •         Commencement date:       1984-02-06         Period covered by pension contributions       •         Pension Retirement Age :       60         (As per service conditions)       •         Annual pensionable salary reflecting the increase periods during last three (3) years or whole period solar yalues, please round to the nearest rand value. When completing salaries, please round down 50 cents up. Examples : (1) R335435.40 round down to R535,435 (2) R35435.40 round up to R535	Employer Code *       Employer Name *       Occupation Code *         000055       SOUTH AFRICAN POLICE SERVICE       SAPS         0       0       0     <

Click the "Get Rules" button in order to select the "Reason for Termination" after screening/amending the employment details.

		Sort
Period From*	Period To*	Annual Salary *
2016-07-01	2017-02-28	345420 + -
Period From*	Period To*	Annual Salary *
2016-04-01	2016-06-30	332133 + -
Period From*	Period To*	Annual Salary *
2015-04-01	2016-03-31	308673 + -
Period From*	Period To*	Annual Salary *
2014-04-01	2015-03-31	288480 + -
Add Item(s)		
Break in service period to be disregarded		
Add Item(s)		
Reason For Termination * Required		
- Please Select		▼ Get Rules
Age at Exit 0	0	

- In this instance it will be "Death".
- Choose the appropriate option.
- The following fields will be populated: "Age at Exit", "Pensionable Years", "Exit Rule" and "Exit Sub Rule".

Reason For Termination *					
Death					▼ Get Rules
Age at Exit					
51	0				
Pensionable Years					
33					
Exit Rule					
14.5					
Exit Sub-Rule					
14.5.2 + 14.1.1(a) + 14.2.1(a) + 14.2.1(b) + 14.2	.4(b)(i)(AA) + 14.2.4(a)				
Total Debt(Department liability)		Debt Dispute 🔲 🛛			
Employment Details Notes:					
2014-04-01	2015-03-31		288480		+ -
Add item(s)					
Bought service period to be recognised					
Add Item(s)					
Break in service period to be disregarded					
Add Item(s) Reason For Termination * Required					
– Please Select –				*	Get Rules
- Please Select - Death Death - Injury on duty Death with Surviving Spouse					
0					
Exit Rule					
Exit Sub-Rule					
Total Debt(Department liability)	D	ebt Dispute 🔲 []			

If satisfied, go to the green "Proceed" button to continue to the next tab which is "Dependents Details".

Debt Dispute	
<i>li</i>	
	Proceed
	Debt Dispute 🗆 🛛

> You will notice that this is a new tab because we are now dealing with a "Death" case.

	<b>PF</b> It, your future						🙎 Andiswa Mai
CASE MANAGEMENT	Z102 form detai	Is for ET	WT20170228134	_			
	Personal Details	Employment Details	Dependants Details	Applicant Details	Payment Details	Supporting Documents	Employer Representative
Q Create Case							
Case Enquiry						Pensi	on Number:
	Surname *Require	d	Initials *Req	uired		First Names(s) *Re	quired
IN-PROGRESS	ID Number *13 dig	its required	Passport Nu	imber *Required		Date OF Birth *Req	ired
						YYYY-MM-DD	
	Relationship to me	mber *Required					
	PLEASE SELE	ст —	* Remove				
	Add Dependant(	s)					
	Dependant(s) De	etails Notes:					
	ghjjhghhjhghjjgh ghgffgfgnmbvm	jghjghjhgjghjghjhgjgh nbvnmbvmvbbvnbvnv	bn				

- > Fill in the "Dependants Details" tab with the available dependants' information that you have.
- > Note that the "Relationship to member" field is "Required"

GE your investment,	PF your future						Andiswa Maila~
///////////////////////////////////////	fished they be had been						
CASE MANAGEMENT	Z102 form detail	s for ET					
(a Inbox	Personal Details	Employment Details	Dependants Details	Applicant Details	Payment Details	Supporting Documents	Employer Representative
Q Create Case							
Case Enquiry						Pensio	n Number:
	Surname *		Initials *			First Names(s) *	
	Mathabatha		L			Tito	
IN-PROGRESS	ID Number		Passport Nun	nber		Date OF Birth *	
11/////////////////////////////////////	8512045236088					1985-12-04	<b></b>
🖹 MR ET							
11/////////////////////////////////////	Relationship to me	mber *Required					
	PLEASE SELE	ст	Remove				
	- PLEASE SELE	CT					
	Spouse Adopted Child Step Child Natural Child Parent <b>Dependant(S) De</b>	ISTRUS MOTES:					

> If you selected e.g. "Spouse", "Spouse Status" will be "Required" as shown below.

GE your investment	PF your future	11111111					Andiswa Maila~
CASE MANAGEMENT	Z102 form detail	s for ET	WT2017022813431				
	Personal Details	Employment Details	Dependants Details	Applicant Details	Payment Details	Supporting Documents	Employer Representative
Q Create Case							
Case Enquiry						Pensio	n Number:
	Surname *		Initials *			First Names(s) *	
	Mathabatha		L			Tito	
IN-PROGRESS	ID Number		Passport Nur	nber		Date OF Birth *	
						1985-12-04	<b></b>
	Relationship to me	mber *	Spouse Statu	s *Required		Damaua	
	Spouse		PLEASE	SELECT	T	Remove	
	Add Dependant(	s)	PLEASE Married Divorced Widow/er	SELECT —			
	Dependant(s) De	tails Notes:					

- The next step will be to "Add Dependants" if any.
  In this instance there is a child.
- The "Relationship to Member" is a "Required" field and it must be filled e.g. "Natural Child".

ta takan a sa ta ta ta ta ta ta ta					,		1. 2
	Details	Details	Details	Details	Details	Documents	Representative
Q Create Case							
Case Enquiry						Pensio	on Number:
111111111111111	Surname *		Initials *			First Names(s) *	
	Mathabatha					lito	
IN-PROGRESS	ID Number		Passport Nu	mber		Date OF Birth *	
(11/11/11/11))						1985-12-04	<b></b>
MR ET							
(11/1/11/1/1/1)	Relationship to men	nber *	Spouse State	us*			
	Spouse		<ul> <li>Married</li> </ul>		•	Remove	
	Surname *		Initials *			First Names(s) *	
	Mathabatha		м			Marley	
	ID Number		Passport Nu	mber		Date OF Birth *	
						1998-12-04	<b></b>
	Palationship to man	abor *Poquired					
	Relationship to men	iber Required	Remove				
	PLEASE SELEC	:T	<u> </u>				
	PLEASE SELEC	T					
	Adopted Child						
(//////////////////////////////////////	Step Child						
	Natural Child						
	Parent						

> The child status is also needed e.g. "Full Time Student"

lnbox	Details	Details	Details	Details	Details	Documents	Representative
Q Create Case							
🛓 Case Enquiry						Pensio	n Number:
	Surname *		Initials *			First Names(s) *	
	Mathabatha		L			Tito	
IN-PROGRESS	ID Number		Passport Nu	mber		Date OF Birth *	
	8512045236088					1985-12-04	<b></b>
MR ET	Relationship to membe	r *	Spouse State	us *			
	Spouse		• Married		T	Remove	
	Surname *		Initials *			First Names(s) *	
	Mathabatha		м			Marley	
	ID Number		Passport Nu	mber		Date OF Birth *	
						1998-12-04	<b>m</b>
	Relationship to membe	ir *	Child Status	*			
	Natural Child		▼ Full Time	Student		Remove	
			PLEASE Under 18	SELECT			
	Add Dependant(s)		Full Time Disabled Must be 1	Student 8 Or Older			
	Dependant(s) Detail	s Notes:					

If satisfied you may go to the green "Proceed" button which will take you to the next tab which is "Applicant Details".

Mathabatha	М	Marley
ID Number	Passport Number	Date OF Birth *
		1998-12-04
Relationship to member *	Child Status *	
Natural Child	Full Time Student	Remove
Add Dependant(s)		
Dependant(s) Details Notes:		
Back		Proceed

> "Applicant Details" should be filled according to the information you have.

GE	.PF				Andiswa Mai
your investme	int, your tuture				
ASE MANAGEMENT	Z102 form details for ET	WT20170228134318			
Inbox	Personal Employment Details Details	Dependants Appli Details Details	cant Payment ails Details	Supporting Documents	Employer Representative
Create Case					
Case Enquiry	The (*) refers to a mandatory/	required field.		Pensio	n Number:
	Title * Required	Initials * Required		First Name * Require	d
7.717.11	- Please Select -	•			
IN-PROGRESS	Surname * Required	ID No / Passport * Rec	quired		
MR ET					
	Postal Address				
	Address * Required	Suburb * Required		City * Required	
	Province/State * Required	Postal Code * Require	d	Country *	
				South Africa	
	Tel No. * Pequired	Coll No * Pequired			

- > You will notice that in this instance the applicant is "Advocate" as this is a death case and the family might be represented by the Advocate.
- Details should be filled as shown below and according to the documents you have.

	Details	Details	Detai	s Details	Details	Documents	Representative
Q Create Case							
Case Enquiry	The (*) refer	s to a mandatory/requ	ired field.			Pensio	n Number:
	Title *		Ini	tials *		First Name *	
<del></del>	ADVOCATE		•	/		Vusumuzi	
[[]]]]]]]]]							
I-PROGRESS	Surname *		ID	No / Passport *			
112111111	Ramajwe			236088			
	Postal Address						
	Address *		Su	burb *		City *	
	45 Cross Street			Nooiplaas		Kroonstad	
	Province/State *		Po	stal Code *		Country *	
	Free State			9501		South Africa	
	Tel No. *		Ce	ll No. *			
	0562411456			0728388774			
	Applicant Details	s Notes:					
	////						

> If satisfied, go to the green "Proceed" button to go to next tab which is "Payment Details"

Address *	Suburb *	City *	
45 Cross Street	Mooiplaas	Kroonstad	
Province/State *	Postal Code *	Country *	
Free State	9501	South Africa	
Tel No. *	Cell No. *		
0562411456	0728388774		

> Select the "Method of Payment" according to the information that you have.

ASE MANAGEMENT	Z102 form detai	Is for ET	L				
Inbox	Personal Details	Employment Details	Dependants Details	Applicant Details	Payment Details	Supporting Documents	Employer Representative
Create Case							
Case Enquiry	The (*) refer	s to a mandatory/requ	ired field.			Pensio	n Number:
<u>24////</u> ///							
<u> </u>	7						
	Method of paym	ent (Applicant) *	- Please	e Select	*		
			- Please	e Select –			
I-PROGRESS	Payment Details	Notes	Unclaim	ied ional Bank			
	r ayment Details	NULES.	Bank	- ( C			
			Waster	or supreme court			
	1						
						225	

- > In this instance the method of payment is the "Bank".
- > The "Banking Details" fields will be reflected and the treatment will be the same as on Resignation cases above.

Inbox	Personal Details	Employment Details	Dependants Details	Applicant Details	Payment Details	Supporting Documents	Employer Representative
Q Create Case							
Case Enquiry	The (*) refer	s to a mandatory/requ	uired field.			Pensio	n Number:
	Method of paym	ent (Applicant) *	Bank		•		
IN-PROGRESS	Banking Details:						
MR ET	Name of account	t holder *					
	V Ramajwe						
	Bank Name *		Branch Na	me *			
	ABSA		<ul> <li>ABSA G</li> </ul>	ENERIC	•		
	D		0				
	Branch Code *		Account N	umber *		Account Type *	
	632005			-		CHEQUE	×
	0		0			0	
	Payment Details	Notes:					
	- ayinone bottano						

Scroll down the page to click the "Proceed" button.

ABSA  ABSA GENERIC  ABSA GENERIC  Account Number* Account Type*  G32005  Base Contrement Details Notes:  Payment Details Notes:	Bank Name *	Branch Name *	
Image:	ABSA	ABSA GENERIC	•
Account Number *     Account Type *       632005     CHEQUE       I     I	]	0	
632005 CHEQUE	Branch Code *	Account Number *	Account Type *
Payment Details Notes:	632005		CHEQUE
Payment Details Notes:	l	0	0

- The next tab is the "Supporting Documents" tab.
  Click either the "Yes" or "No" button as you proceed to complete this tab.
- > Upload your document/s

x	Personal Details	Employment Details	Dependants Details	Applicant Details	Payment Details	Supporting Documents	Employer Representati			
ite Case										
	Please tick the app documents in the	propriate boxes below sequence as indicated	to indicate that all the I on the checklist.	required supportin	g documentation w	ill be attached. Please	upload the suppo			
IGRESS	A copy of the dece	ased member's ID (pro	eferably bar-coded) or	Passport.)			Attached Yes® No⊖			
	Copy of the Nomin	Copy of the Nomination of Beneficiaries Form (WP1002), where available.								
	Duly completed Sp child (over the age	oouse's or Orphan's Per of 18) and/or guardia	nsion Form (Z143). A : In for a set of orphans.	separate application	n form is needed fo	r each spouse, major	Attached Yes® No⊖			
	Proof of termination PERSAL stating the service of the men	on of service is require e Payroll No (PERSAL nber.	ed such as a printout o No), Withdrawal reasc	of the Service Attack on, Withdrawal date,	ned Termination or , Salary level and no	Service Record from otch on the last day of	Attached Yes® No◯			
	Conditional: For wi alternatively an aff (preferably with su an authorised mer	hen a spouse is registe fidavit. For a Life Partr apporting documentati nber of any organisati	ered then an originally nership: affidavits sett ion), of that relationsh on. institution or socie	r certified copy of th ting out the nature o ip from a member o etv of which one or l	e Marriage Certific of the relationship, a of each party's famil both parties has bee	ate is required or ind indicators, y, a joint friend and/or en a member.	Attached Yes● No○			

Duly completed ACB Bank Particulars Form (Z894) or for actuarial transfer to an approved external retirement fund a duly completed Z1525 form with Particulars of approved external retirement fund for transfer of funds.	Attached Yes® No◯
Conditional: For debt deduction: An originally certified copy of a Court Order or Member's approval in writing for debt due to Negligence, Misconduct or Theft as per GEP Law - Section 21.3(c) or in respect of debt for more than the value of R10,000.	Attached Yes <sup>©</sup> No®
Conditional: Where the deceased member had a previous marriage, an originally certified copy of the former spouse's ID (must be bar-coded) or Passport, Marriage Certificate, Death Certificate, Settlement Agreement and/or Decree of Divorce are needed. Where payments are due to an ex-spouse, an ACB Bank Particulars Form (Z894) is needed. Divorce Settlement Agreements for the division of pension interest are only effective from 1 August 1989 as per the amendment to the Divorce Act1 and a separate Withdrawal from Fund Form (Z102) completed by the employer is needed.	Attached Yes◯ No®
Conditional: For any possible dependants (current marriage or previous marriage) (natural oradopted), an originally certified copy of the Full Birth Certificate or ID (must be bar-coded). Benefits will be paid to the Master of the High Court for minors. In order to establish dependency an originally certified copy of a Court Order in respect of maintenance payable where applicable.	Attached Yes® No⊖
Conditional: If a student is applicable and over 18 years but less than 22 years, proof of registration is required from the institution. If the child is disabled and over 18, medical proof of the disability and of financial dependency is required through an Affidavit that states the: amount of financial dependency and personal income of person concerned.	Attached Yes® No◯
Conditional: If an adopted child is applicable, an originally certified copy of a Legal Adoption Certificate (Issued by the Department of Home Affairs) is required upon which the names of the adopted parents appear.	Attached Yes® No
Conditional: For children in the care of a guardian (from current or previous marriage) (natural or adopted), a letter from a Magistrate or Master of the High Court that indicates the appointment as guardian over the children is required.	Attached Yes◯ No®
Conditional: For when a portion of the benefit payable is due to an Estate, an originally certified copy of the letter of Executorship is needed.	Attached Yes <sup>©</sup> No <sup>©</sup>
Conditional: If a Trust is applicable, a copy of the letter of authorisation from the Master of the High Court and a copy of the Trust Deed are needed. A duly completed ACB Bank Particulars Form (Z894) is required for the Trust.	Attached

Organize 🔻 New folde	er	<b>≣</b> •		noice Form to choose between continued memberships (4/o	Attached
☆ Favorites ■ Desktop	Documents library TGS Docs	Arrange by: F	older 🔻		Tese No
Downloads	Name	Date modified Type	*	h Certificate (Issued by the Department of Home Affairs)	Attached
and necent races	Jan 2015	2/26/2015 3:38 PM File fe	older 🗐		1630 1600
😂 Libraries	Jan 2016	7/27/2016 1:03 PM File fo	older		
Documents	Applications	11/28/2016 2:28 PM File fo	older		
A Music	퉬 Benefit Statement	9/9/2016 3:48 PM File fo	older		
Pictures	🎉 Certificates	11/28/2016 1:58 PM File fo	older		
Videos	📙 CV	2/10/2017 10:40 AM File fo	older		
	Becurity Clearance	7/27/2016 1:03 PM File fo	older	gger than 5mb.	
I Computer	🔁 1400 Lisence	8/6/2010 2:39 PM Adob	e Acrobat D		
Local Disk (C:)	规 Acknowledgement of Debt Medical overpayment	8/3/2010 9:29 AM Adob	e Acrobat D	file chosen	
mainframe (\\gp •	· · · · · · · · · · · · · · · · · · ·				
Ele er		AUGUL			
File na	ame:	✓ All Files	•		
		Open 🔫	Cancel		
	///////////////////////////////////////				
	Back				Proceed
		1			

A duty completed state subsidised medical Contribution Choice Form to GEPF subsidised) or the payment of an once-off gratuity.	Attacheα Yes® No									
An originally certified copy of the deceased member's Death Certificate (Issued by the Department of Home Affairs) Attached Yes® No										
Document Management										
Uploaded documents must be pdf format and not be bigger than 5ml	<b>)</b> .									
Multiple Document Uploader Choose Files No file chosen										
UPLOAD QUEUE										
Files in Queue: 1										
Name	Size	Progress	Status	Actions						
1400 Lisence.pdf	0.11 MB		*	🟵 Upload 🕒 V	/iew PDF					
Queue progress:										
€ Upload all										
Supporting Documents Notes:										

UPLOAD QUEUE				
Files in Queue: 1				
Name	Size	Progress	Status	Actions
1400 Lisence.pdf	0.11 MB		~	③ Upload View PDF 💼 Remove
Queue progress:				
To Upload all				
Supporting Documents Notes:				
Back				Proceed

- If satisfied go to the green "Proceed" button to go to the next tab which is "Employer Representative".
- > This tab should be treated similar to the Resignation cases above.

MANAGEMENT	Z102 form details for E							
х	Personal Employment Dep Details Details D		ependants Details	Applicant Details	Payment Details	Supporting Documents	Employer Representative	
ate Case								
e Enquiry	The (*) refers to a m	nandatory/required fie	ld.			Pens	ion Number:	
<u> </u>								
	Case Created By							
	Full Name	Full Name			Designation			
	Andiswa Maila		Capturer			0122192323		
DGRESS	Fax No.		E-mail					
	01221231231		tester1@	gpaa.gov.za				
	Postal Address	Suburb		City		Count	ry	
	34 Hamilton street	Arcadia	э	Pre	etoria	Sou	th A <mark>f</mark> rica	
	Postal Code							
	0001							

> Proceed to submit the case to the Verifier.

your investment	MR ET					
CASE MANAGEMENT	Z102 Per Dr Th You have chose	n to send this app Do you	Jication to the Employ want to continue?	er Verifier for approval	Supporting Documents	Employer Representative
	Full Nan Andisy			Cancel Proceed	el No 0122192323	
IN-PROGRESS	Fax No.		E-mail			
MR ET	01221231231		tester1@gpaa.gov.za	a		
	Postal Address	Suburb		City	Count	try
	34 Hamilton street	Arcadia		Pretoria	Sou	ith Africa
	Postal Code					
	0001					
	Back View Z102					Submit Application

# 7. CASE ENQUIRY - CAPTURER AND VERIFIER

- > You will click on the "Case Enquiry" function on the left-hand side of the screen as shown below.
- Use the filters below to search for a case e.g. ID Number, Employee Number, and Pension Number when you need to do an enquiry or status update on a case.

GEF your investment, yo	CAP311 CAP:
CASE MANAGEMENT	User filters below to search for cases.
Q Create Case	ID Number Employee Number Pension Number Case Reference CP Number Barcode Date Range
Case Enquiry	ID Number
	Submit

- You will be required to insert the number according to the filter chosen e.g. Pension Number, and then click "Submit"
- The "Results" will be shown on the middle part of the screen as shown below.

		11/1/1/	17777	////	11121	1,11	/////				
CASE MANAGEMENT	User filters below to search for cases.										
lnbox	ID Number Employe	e Number - I	Paneion Num	abor	Case Refer	0000	CP Numb	ar Ban	node Date Pange		
Q Create Case											
Case Enquiry	Pension Number										
	Submit										
	Dasulta										
	Case Ref	Bar Code	Member No.	CP No.	Persal No.	Initials	Surname	Employer Code	Employer Name		
		9258310403	01141090			мс	TAU	000055	SOUTH AFRICAN POLICE SERVICE		
	Bar Code History										
	Bar Codes					Comme	ents				
	9258310403										
	Termination Reason										
	Exit Reason			Exit Da	ate			Da	ate Paid		
	RESIGNATION			2017-	02-28						

> You will need to scroll down the screen in order to see the bottom part of the screen.

Case Ref	Bar Code	No.	No.	No.	Initials	Surname	Code	Employer Name
	9258310403		1		MC	TAU	000055	SOUTH AFRICAN POLICE SERVICE
Bar Code History								
Bar Codes					Comme	ents		
9258310403								
Termination Reason								
Exit Reason			Exit Dat	e			Dat	te Paid
RESIGNATION		2017-02-28						
Payment Details Method of payment (Applic Calculation Details	ant) *							
Pensionable Years								
Exit Rule								
Exit Sub Rule								
Groce Ronofit Amount		Gratuit	v			Annuity		Exit Code
01055 Delletti Allount			/					

- > At the bottom of the screen you will see the "Audit Log" as shown below.
- You will be able to view the Status date, User Id, Username, Status and Comments of the case you need to enquire on.
- Read the audit log from bottom to top

Documents Files Uploaded: 1						
Name			Size	Progress	Status	Actions
AUTOGENERATED_	Z102		0.06 MB		× 1	View PDF
Status Date 2017-02-14	User ID VER322	User Name VER322	Status capture-approval-withdrawn	Comm	ents per has withdra	awn termination of
Audit Log						
2017-02-14 15:00:13.925	VER322	VER322 VER322	capture-approval-withdrawn	Memb servic Memb	oer has withdra e oer has withdra	awn termination of
				servic	es	
2017-02-14 14:40:56.600	CAP001	Andiswa Maila	Case Submitted for Employer Approval			
2017-02-14 14:30:47.401	CAP001	Andiswa Maila	In Employer Capturing	Applic	cation started.	

- > All the above examples pertain to the role of the Capturer.
- > The next section of the Employer User Guide focuses on the role of the Verifier.

#### 8. EMPLOYER VERIFIER

Notes to Remember:

- Take note that all fields are "locked" (greyed out) for the Verifier profile which means that you will not be allowed to amend information in the respective fields.
- Also note that if you reject a particular tab screen, you will still proceed through all the tab screens until completion of the application.
- > At the end of the verification process, such a case with a rejection will have to be rejected to the Capturer for correction.
- > If all tabs have been approved, you will be allowed to submit the application to the GPAA.
- The Employer Verifier will login to the PCM application by using the user id and password allocated to him/her by GPAA as shown in the screen below.
- If the case is for Special Dispensation Early Retirement without liability, the Verifier should check the warning on top of the screen as shown in the below screen and approve accordingly.

	Z102 form details fo	r FM CAGWE IIII WT20190	826101210518			
	Personal Details	Employment Details	Payment Details	Additional Information	Supporting Documents	Employer Representative
🛓 Case Enquiry	-					
Withdraw Case	The (*) refers to	a mandatory/required fiel	d.		Pens	ion Number: 96173137
<ul> <li>Reassign Cases</li> </ul>	WARNING: PLEASE N WARNING: DOHA RE	NOTE THIS IS A SPECIAL E	ISPENSATION EARLY	Y RETIREMENT		
Member Enquiry	WARNING: DOHA PA	SSED				

I Case Mana X Parontes: Took Hafe: eb App @ Tree Script Program: Dava Platform Standard Ed.: Disagested Sites = @ Web Outlook @ Pre-Portal @ QA-Portal @ Pre-Bortal @ Page Record @ Adg @emment 1000 @ Page Record @ Adg @emment 1000	http:// <b>17216.142.122</b> .7002/pension-case-management/login	Area and		Q -
Events Tell Hell Is de Par i feel Schip Programs i ave flatform Standard Ed i Suggested Sites • @ Web Outlook i Pre-Portal @ QA-Portal @ help-relief @ Pages Record @ Add Comment (DPC) Web Comment (Pages Record) @ Add Comment (DPC) Is de Pages Record () Stap Record () Add Comment (DPC) Is de Pages Record () Stap Record () Add Comment (DPC) Is de Pages Record () Stap Record () Add Comment (DPC) Is de Pages Record () Stap Record () Add Comment (DPC) Is de Pages Record () Stap Record () Add Comment (DPC) Is de Pages Record () Stap Record () Add Comment (DPC) Is de Pages Record () Stap Record () Add Comment (DPC) Is de Pages Record () Stap Record () Add Comment (DPC) Is de Pages Record () Stap Record () Add Comment (DPC) Is de Pages Record () Stap Record () Add Comment (DPC) Is de Pages Record () Stap Record () Add Comment (DPC) Is de Pages Record () Stap Record () Add Comment (DPC) Is de Pages Record () Stap Record () Add Comment (DPC) Is de Pages Record () Stap Record () Add Comment (DPC) Is de Pages Record () Stap Record () Add Comment (DPC) Is de Pages Record () Stap Record () Add Comment (DPC) Is de Pages Record () Stap Record () Add Comment (DPC) Is de Pages Record () Stap Record () Add Comment (DPC) Is de Pages Record () Add Comment (DPC) Is de Pages Record () Stap Record () Add Comment (DPC) Is de Pages Record () Add Comment (DPC) <p< th=""><th>on Case Mana</th><th></th><th></th><th></th></p<>	on Case Mana			
eb App ) free Script Program ) june Platform Standard Ed. () Suggested Site = () Web Outlook () Pre-Portal () QA-Portal () Ipran () Page Record () Sugp Record () Add Comment () () () () () () () () () () () () ()			E Problem Steps Recorder	
Image: Constraint Notice No	Web App 📄 Free Script Programs 🥃 Java Platform Standard Ed 🗿 Sugg	ested Sites 🔻 👩 Web Outlook 🗿 Pre-Portal 🗿 QA-Portal 🧐 hp-alm	Payse Record O Stop Record Add Comment	
Login sub007 ••••• Important Notice System Availability Login				
Login sub007 ••••• Important Notice System Availability Login				
Login sub007  Important Notice System Availability Login				
sub007  Important Notice System Availability Login		Login	28	
•••••  Important Notice System Availability  Login		sub007		
Important Notice System Availability Login		•••••		
Login		Important Notice System	1	
		Login		
		Login		
		al all all and the		
Would you like to store your password for 172.16.142.122? Why am I seeing this? Yes Not for this site ×	Would you like to store your password for 172.16.142.12	2? Why am I seeing this?	Yes Not for this site ×	

> "Login" (push button) e.g. Username: SUB007 and password as the Verifier.

ter your investment, your future		
	Login	
	sub007	
	•••••	
	Important Notice System Availability	
	Login	

> After you have clicked the Login button, the screen below will be shown.



- > If there are cases in the Verifier Inbox it will be shown as per the following screen.
- > There is one case Pending.
- > You/Verifier should navigate the cursor and click on the name in the box showing "NEW"

GEL your investment, y	DF our future	VER322 VER322~
CASE MANAGEMENT	Total pending cases for role: VERIFY :0 Total pending cases for user:	Type: RESIGNATION
Withdraw Case Reassign Cases	VB322 : Search Status Type - ALL - • MRS SC7	First Name: Date Of Birls: 1973-02-19 ID Number: Member Number: Member Number: Member Number: Cell Phone: Cell Phone: Home Phone: 00 Service Date:2015-12-01
		Employed By:000055 / SOUTH AFRICAN POLICE SERVICE Status: NEW Last Processed By: GPAA View Application

- > Click on the "View Application" button after identifying that it is the correct case that you intend verifying.
- The "Personal Details" tab will appear as shown below.
   Take note that this is an example of a Resignation case.

GE your investment y	our future				Andisw
CASE MANAGEMENT	Z102 form details for <b>SO</b>				
⊖ Inbox	Personal Details	Employment Details	Payment Details	Supporting Documents	Employer Representative
🛔 Case Enquiry					
	The (*) refers to a ma	ndatory/required field.			Pension Number:
🦘 Reassign Cases	WARNING: DOHA REQUEST WARNING: DOHA Name mis	ED smatch - SELBY OWEN			
IN-PROGRESS	WARNING. DOHA FAILED				
<u> </u>	Persal Number *	Current	Pension Number *	Pre-amalga	mation Number
MR S	400000				
DOCUMENTS	Title *	Initials	*	Last Name(	Surname) *
	MR	• S0		GROVE	
AUTOGENERATED_Z102	First Name(s) *	Gender	*		
admission of member to gepf sop.pdf	SELBY	MAL	E	Ŧ	
	Maiden Name	ID num	ber	Passport Nu	imber
				Π	
				4	

You will scroll down the page verifying all the fields in conjunction with the supporting  $\succ$ documents at your disposal.

Street Name * Street Number	City *
PHALABORWA	PHALABORWA
	D
Complex Name Complex Number	
Province/State * Postcode *	Country *
Gauteng 0001	South Africa
Postal Address	
PO Box Suburb	City *
PO BOX 317 PHALABORWA	PHALABORWA
Province/State * Postcode *	Country *
Province/State * Postcode * Gauteng 1390	South Africa

If you are satisfied with all the fields, you will scroll down towards the end of the screen to approve the "Personal Details" tab as shown below or alternatively if you identify any error(s), reject the tab screen and proceed to the next tab screen.

Postal Address		
P.O Box	Suburb	City *
PO BOX 317	PHALABORWA	PHALABORWA
Province/State *	Postcode *	Country *
Gauteng	1390	South Africa
0		0
Reject Reason		
- Please Select -		*
- Please Select -		Y
- Please Select -		•
- Please Select - Personal Details Notes:		· ·
- Please Select - Personal Details Notes:		•
- Please Select - Personal Details Notes:		•
- Please Select - Personal Details Notes:		<b></b>
- Please Select - Personal Details Notes:		•
– Please Select – Personal Details Notes:		•
- Please Select - Personal Details Notes:		<b></b>
- Please Select Personal Details Notes:		•
- Please Select - Personal Details Notes:		•
- Please Select - Personal Details Notes:		•
- Please Select - Personal Details Notes:		<b>,</b>
- Please Select - Personal Details Notes:		•
- Please Select - Personal Details Notes:		<b>,</b>
- Please Select - Personal Details Notes:		•
- Please Select Personal Details Notes:	Point	• •

> After approving, the next tab "Employment Details" will be reflected as shown below.

GE your investment, y	<b>PF</b> <sub>iour</sub> future					•	Andiswa Mailay
CASE MANAGEMENT	Z102 form details for <b>SO GROVE</b>	WT201702130923	1851102				
Inbox	Personal Details	Employment Details	Payment Details	Supp Docu	orting ments	Emp Represe	loyer entative
Case Enquiry							
Withdraw Case	The (*) refers to a mandatory/	required field.				Pension Numbe	r: 99086198
Reassign Cases	WARNING: DOHA REQUESTED WARNING: DOHA Name mismatch -	SELBY OWEN					
IN-PROGRESS	WARNING: DOHA FAILED						
	Employer Code *	Emplo	yer Name *		Occupation (	Code *	
MR SO GROVE	000055	SOL	ITH AFRICAN POLICE SERVIO	E	SAPS		v
DOCUMENTS	0	0			Service Term	nination Date *	
AUTOGENERATED_Z102	Commencement date: Period covered by pension contribut	201	6-01-01	1	2017-02-13	3	iii
admission of member to		0			0		
gepf sop.pdf	Pension Retirement Age	*					
	(As per service conditions)	60		*			
		0					

If satisfied, you may proceed to approve or if not satisfied you must reject as shown in the below screen.

75115571303715	Exit Sub-Rule		
6.11.2191.31	14.4.1(a)		
	Total Debt(Department liability)	Debt Dispute 🗐 🛛	
8 91/ 92/ 91	0		
	Reject Reason		
	- Please Select -	۲	
	Employment Details Notes:		
		<i>a</i>	
19819999	Back	Reject	Approve
About Us FAQs Support			
GPAA Privacy Security Terr	is of use		

> The following tab will be "Payment Details" where you will verify the banking details.

CASE MANAGEMENT	2102 form details for				
Inbox	Personal Details	Employment Details	Payment Details	Supporting Documents	Employer Representative
Case Enquiry					
Withdraw Case	The (*) refers to a m	andatory/required field			Pension Number:
Reassign Cases	WARNING: Bank Verification WARNING: DOHA REQUES WARNING: DOHA PASSED	on requested TED			
N-PROGRESS	WARNING: Bank validation	i successful.			
	Method of payment (App	licant) *	Bank	Ŧ	
	Method of payment (App Banking Details:	licant) *	Bank	Y	
MRS	Method of payment (App Banking Details: Name of account holder	licant) *	Bank	T	
MRS	Method of payment (App Banking Details: Name of account holder	vlicant) *	Bank	•	
MRS	Method of payment (App Banking Details: Name of account holder	licant) *	Bank	•	
MRS	Method of payment (App Banking Details: Name of account holder [] Bank Name *	slicant) *	Bank Branch Name *	T	
MRS	Method of payment (App Banking Details: Name of account holder [] Bank Name * ABSA	*	Bank Branch Name * ABSA GENERIC	• 	
MRS	Method of payment (App Banking Details: Name of account holder [] Bank Name * ABSA [ABSA BANK]	slicant) *	Bank Branch Name * ABSA GENERIC	* 	
MRS	Method of payment (App Banking Details: Name of account holder [] Bank Name * ABSA [ABSA BANK] Branch Code *	slicant) *	Bank Branch Name * ABSA GENERIC Account Number *	Account 1	уре *
MRS	Method of payment (App Banking Details: Name of account holder [] Bank Name * ABSA [ABSA BANK] Branch Code * 632005	*	Bank Branch Name * ABSA GENERIC Account Number *		уре * Е <b>у</b>

> Proceed to the next tab which is the "Supporting Documents" tab, after approving or rejecting the previous tab.

CASE MANAGEMENT	2 IU2 form details for SU	вк			
lnbox	Personal Details	Employment Details	Payment Details	Supporting Documents	Employer Representative
🌲 Case Enquiry					
Withdraw Case	The (*) refers to a ma	indatory/required field.			Pension Number: 99086198
* Reassign Cases	WARNING: DOHA REQUEST WARNING: DOHA Name mis WARNING: DOHA FAILED	ED smatch - SELBY OWEN			
IN-PROGRESS					
MR SO	Please tick the appropriate documents in the sequence	boxes below to indicate that a as indicated on the checklist	ll the required supporting o	documentation will be attached	. Please upload the supporting
111111111111	An originally certified copy	of an ID (must be bar-coded)	or Attached Passport of the	e member – exceptions as per l	D Attached
DOCUMENTS	Policy.				Yes No®
AUTOGENERATED_Z102	Proof of termination of serv	vice is required such as a print	out of Attached the Service	e Termination or Service Record	from Attached
admission of member to	PERSAL stating the Payroll service of the member.	No (PERSAL No), Withdrawal	reason, Withdrawal date, Sa	alary level and notch on the las	t day of Yes No®
gepf sop.pdf	Conditional: For when the s	urname of the person is differ	ent to the surname on the I	D. Passport or Death Certificate	e. Only Attached
	proof from the Department	of Home Affairs is required to	confirm the surname	,	Yes◯ No®
	Duly completed ACB Bank I	Particulars Form (Z894) or for	actuarial transfer to an app	proved external retirement fund	a duly Attached
	completed Z1525 form with	n Particulars of approved exte	nal retirement fund for trar	nsfer of funds.	Yes No®
	Originally signed GEPF Res	ignation Choice Form from the	member where a once-off	firrevocable choice is made be	tween: Attached
	Option 1: receiving a once- external retirement fund.	off gratuity payment into own	account; or Option 2: trans	ferring the benefit to an approv	ed Yes No®
	Copy of a letter of approval	for discharge signed by the H	ead Attached of an office (	Department), stating the reaso	n for Attached
	discharge (Misconduct or I	II-health by own doing), applic	able section of the act and	date of resignation.	Yes No

> Approve or reject.

1111111111111					
	Name	Size	Progress	Status	Actions
	AUTOGENERATED_Z102	0.06 MB		1	View PDF
	admission of member to gepf sop.pdf	0.60 MB		~	View PDF
	Reject Reason				
	- Please Select -			•	
	Supporting Documents Notes:				
				1.	
	_				
	Back	EJECT			APPROVE
		111111111	1111111	11////	11/////////////////////////////////////
Bout Us FAQs Support	ofuse				
orac many security terms	01030				

> The following tab will be the "Employer Representative" tab.

CASE MANAGEMENT	Z102 form details for S						
	Personal Details	Employment Details	Pay Di	/ment etails	Supp	oorting uments	Employer Representative
Case Enquiry							
Withdraw Case	The (*) refers to a ma	indatory/required field.					Pension Number:
A Reassign Cases	WARNING: DOHA REQUEST WARNING: DOHA Name mi	ED smatch - SELBY OWEN					
IN-PROGRESS	Case Created By						
	Full Name		Designation			Tel No	
	Benito Capture		capturer	capturer		0122196565	
DOCUMENTS	Fax No.		E-mail				
	0125656565		tester2@gpaa.g	ov.za			
AUTOGENERATED_Z102	Postal Address	Suburb		City			Country
admission of member to	34 hamilton street	Arcadia		Pretr	oria		South Africa
gepf sop.pdt	Postal Code						
	0001						
	Case Approved By						
	Full Name		Designation			Tel No	
	Andiswa Maila		verifier			3513514	
	Fax No.		E-mail				

- This tab will provide you with the details of the Capturer as well as yourself as the Verifier.
- Below these details, you will find the actions that you have performed for every tab screen, that being the actions of either "reject" or "approve".
- If you have approved all tab screens, you will be allowed to click the "Submit Application" button which will be activated.
- > This will allow you to then submit the application to the GPAA.
- If you have rejected any tab screen, the "Reject Application" button will be activated which will then allow you to reject the application back to the Capturer.

Anuiswa Malla	verifier		3313314
Fax No.	E-mail		
24154145	test@p	cm	
Postal Address	Suburb	City	Country
848	oij	iuyhg	South
Postal Code			
0001			
#	Section		Status
# 1853379	Section ATTACHMENTS		Status
# 1853379 1853378	Section ATTACHMENTS PAYMENT_DETAILS		Status & Approved & Approved
# 1853379 1853377	Section Section ATTACHMENTS PAYMENT_DETAILS EMPLOYMENT_DETAILS		Status Ø Approved Ø Approved Ø Approved
# 1853379 1853378 1853377 1853376	Section Section ATTACHMENTS PAYMENT_DETAILS EMPLOYMENT_DETAILS		Status C Approved C Approved C Approved C Approved
# 1853379 1853378 1853377 1853376	Section Section ATTACHMENTS PAYMENT_DETAILS EMPLOYMENT_DETAILS PERSONAL_DETAILS		Status C Approved Approved Approved Approved
# 1853379 1853378 1853376	Section Section ATTACHMENTS PAYMENT_DETAILS EMPLOYMENT_DETAILS PERSONAL_DETAILS		Status C Approved Approved Approved Approved

- > After clicking the "Submit Application" button, the following screen will be shown
- > You will click the "Proceed" button so that the application can be submitted to the GPAA.
- In either instance, the application will then be removed from your Inbox, which will allow you to proceed with the next application.

http://172.16.142.122.7002/pension-case-manageme	nt/index#/case/WT2017013111401848867	/view?caseType=RESIGNATION		
Pension Case Mana ×	and the same of the local division of the lo	Approximation of the local division of the l		the line was
View Favorites Tools Help				🛐 Problem Steps Recorder
ook Web App 🗿 Free Script Programs 💆 Java Platfor	m Standard Ed 🗿 Suggested Sites 🔻	😡 Web Outlook 🧧 Pre-Portal	🗿 QA-Portal 🤝 hp-alm	🕡 Pause Record 👩 Stop Record 폐 Add Comp
asc Post 233 You 1	Al C MR MA	prove the application and you want to continue?	d submit to GPAA.	Do Status Ø Approved
	(84 184 184		Cancel Proces	e Approved Approved Approved
	Back	Reject Application	1	Submit Applicat
About Us FAQs Support				

# 9. WITHDRAWING A CASE

> The application can be withdrawn due to the following reasons (on Dropdown Menu):

- Member has withdrawn termination of service.
- Incorrect termination type has been selected.
- New information has been received.
- Other.

NB. In the case where "Other" has been selected, the textbox should then pop-up where you will need to type the reason for the application withdrawal.

- Select the "Withdraw Case"" function on the left hand side of the screen
- Enter the Search criteria in order to search for the specific case to withdraw.

GEP your investment, yo	2 F ur future	VER322 VER322~
CASE MANAGEMENT	Withdraw Exit Application	
Reassign Cases	ID Number Employee Number Pension Number Case Reference Barcode Pension Number 96160979 Submit	
	Results	

Select the "Submit" button The search results will appear Select "Withdraw Application" The results will be like it is shown on the below screen.

Submit							
Results	lesults						
ID Number	Member Number	Title	Initials	Name & Surname	Gende	r Comments	
		MRS	SCP		FEMAL	E	Withdraw
Personal Datail	o of the Member						
Personal Detail Persal Number	s of the Member	-	Curre	nt Pension Number	Title		
Personal Detail Persal Number	s of the Member		Curre	nt Pension Number	Title		
Personal Detail Persal Number Initials	s of the Member		Curre	nt Pension Number	Title MRS Surnam	e	
Personal Detail Persal Number Initials SCP	s of the Member		Curree Genda	nt Pension Number	Title MRS Surnam	•	
Personal Detail Persal Number Initials SCP First Name(s)	s of the Member		Currer Gende FEN Maide	nt Pension Number er MALE en Name	Title MRS Surnam Date of	e Birth	
Personal Detail Persal Number Initials SCP First Name(s)	s of the Member		Curre Genda FEN Maide	nt Pension Number	Title MRS Surnam Date of 1973-	e Birth 02-19	

initials	Gender	Sumane
SCP	FEMALE	VENTER
First Name(s)	Maiden Name	Date of Birth
ETRONELLA		1973-02-19
Identity Number	Income Tax Number	
2190194087	2447097144	
Residential Address		
itesidential Address	Pretoria	
	Gauteng	
	0000	
Postal Address	Dratavia	
	Gauteng	
	0083	
Telephone Number	Cell Number	E-mail
0.0	326125646	
Employment Details of the Member	Occupation Code	Employer Name
Employment Details of the Member	Occupation Code	Employer Name SOUTH AFRICAN POLICE SERVIC
Employment Details of the Member Employer Code 000055 Commencement Date	Occupation Code 4 Termination Date	Employer Name SOUTH AFRICAN POLICE SERVIC Exit Rule
Employment Details of the Member Employer Code 000055 Commencement Date 2015-12-01	Occupation Code 4 Termination Date 2017-02-28	Employer Name SOUTH AFRICAN POLICE SERVIC Exit Rule 14.4.1
Employment Details of the Member Employer Code 000055 Commencement Date 2015-12-01 Retirement Age	Occupation Code 4 Termination Date 2017-02-28 Reason For Termination	Employer Name SOUTH AFRICAN POLICE SERVIC Exit Rule 14.4.1

Scrolling down to the bottom of the screen you will be required to finish "Reason for Withdraw" (select from drop down menu) and also comments should be given in a comments box as shown below.

11/1///>			
[[]]]]]	000055	4	SOUTH AFRICAN POLICE SERVICE
	Commencement Date	Termination Date	Exit Rule
11/////	2015-12-01	2017-02-28	14.4.1
	Retirement Age	Reason For Termination	
		Resignation: Own Account	
	Reason for Withdraw	Please Select	*
			Required
	Comments	* Required	
111/1/	commets!		
		1	B
1//////			
	Cancel		Withdraw
(1/////			

- After completing the reason and commenting, you must click on the "Withdraw" button and the following screen will be shown.
- > You must click "Proceed" and the request will be processed.

11/1/11	Commencement Date	Termination Date	Exit Rule
	201 MRS SCP		44.1
	Rea You have chosen to Do you to	o withdraw this application. want to continue?	• *
	Mem	Cancel Proceed	
	Cancel		Withdraw

# 10. REASSIGNING CASE

> Click the "Reassign Case" function on the left hand side of the screen

- You can identify a case by using the "ID No.; Employee No.; Pension No.; CP No.; Barcode or Case Reference" to search for a case.
- > In the screen below the "Case Reference" was used.

GEP your investment, yo	<b>PF</b> or future	P Mpho Molefe
CASE MANAGEMENT	SEARCH 000055 ID Number Employee Number Pension Number CP Number Barcode Username Role	Case Reference Date Range
Reassign Cases     Update Case	Case Reference	

> Type/Paste in the reference number and click "submit" as shown below.

CASE MANAGEMENT	SEARCH 000055
a Inbox a Case Enquiry w Withdraw Case	ID Number Employee Number Pension Number CP Number Barcode Case Reference Date Range Username Role
<ul> <li>Reassign Cases</li> </ul>	Case Reference ×

> A search mouse wheel will start searching for that case.

GEF	• F		C.		Pho Molefe
CASE MANAGEMENT	SEARCH 000055				
G Inbox & Case Enquiry Withdraw Case	ID Number Employee Number Username Role	Pension Number CP Number	Barcode	Case Reference	Date Range
• Reassign Cases	Case Reference	it			
hê				)	
	1 WT2017013111401848867	Type : RESIGNATION Name : MANYONYOBA APPL	E VENTER	Employer Code	: 000055

> The case will open with all the details as shown below.

■ Withdraw Case	Username Role	ų.	
• Reassign Cases	Case Reference	mit	
	1	Type : RESIGNATION Name : MANYONYOBA APPLE VENTER Gender : MALE	Employer Code : 000055 Id Number :
		Date Of Birth : 1977-12-18 Date Created : 2017-01-31 11:40:28.280 Status : capture-application-next Last Activity : 29 seconds	Termination Date : 2017-01-31 Last Actioned : 2017-01-31 11:41:22.68 Assigned User :
12 / 23			

- $\succ$
- Navigate to the small box below the green box numbered 1. Click into that small box for the assign functionality to be activated.  $\succ$

🗉 Withdraw Case	Username Role	Ľ	
* Reassign Cases	Case Reference	mit	
	1 WT2017013111401848867	Type : RESIGNATION Name : MANYONYOBA APPLE VENTER Gender : MALE Date Of Birth : 1977-12-18 Date Created : 2017-01-31 11:40:28.280 Status : capture-application-next Last Activity : 29 seconds	Employer Code : 000055 Id Number :
/		Select User	- 21

Select the user, whom you want to assign the case to from the drop down arrow as  $\succ$ shown below.

	Employer code : 000055
Name : MANYONYOBA APPLE VENTER	ld Number :
Gender : MALE	Member Number :
Date Of Birth : 1977-12-18	Termination Date : 2017-01-31
Date Created : 2017-01-31 11:40:28.280	Last Actioned : 2017-01-31 11:41:22,685
Status : capture-application-next	Assigned User :
Last Activity : 29 seconds	
Select User	
Please Select - Y Assign	

- $\succ$
- A list of users will appear on the drop down list. Select who you want to assign a case to from the list. E.g. "Molefe Mpho (SUB007)"  $\succ$



> Click on "Assign" (push button) as shown below.

	1	Type : RESIGNATION	Employer Code : 000055
. 2 554		Name : MANYONYOBA APPLE VENTER	ld Number :
		Gender : MALE	Member Number :
1916		Date Of Birth : 1977-12-18	Termination Date : 2017-01-31
		Date Created : 2017-01-31 11:40:28.280	Last Actioned : 2017-01-31 11:41:22.685
		Status : capture-application-next	Assigned User :
		Last Activity : 29 seconds	
		Select User Molefe Mpho (SU) Aspign	

> The case will be forwarded/assigned to the selected user's inbox.

1	Type : RESIGNATION	Employer Code : 000055
	Name : MANYONYOBA APPLE VENTER	ld Number :
	Gender : MALE	Member Number :
116	Date Of Birth : 1977-12-18	Termination Date : 2017-01-31
	Date Created : 2017-01-31 11:40:28:280	Last Actioned : 2017-01-31 11:41:22.685
	Status : capture-application-next	Assigned User :
L3	Last Activity : 29 seconds	
	Select User	Result
	Molefe Mpho (SU	Cases successfully assigned.

> The selected user can click on "Inbox" and use the reference number to view the case assigned to him/her.

## 11. SUPPORT AND FREQUENTLY ASKED QUESTIONS (FAQS)

> Q. When I navigate to the PCM website, it gives me a 401 Unauthorized message.

A. Refresh the page in your browser or press F5. The login screen should display.

Q. I can't log in using my user name and password.

A. Retry using your username and password. If you still cannot login, send an email to PCMonline@gpaa.gov.za to reset your account.

Q. How can I reset my password?

A. Log into your PCM account. In the right hand corner, click on your name which is a link and select "My Profile" option. On my profile screen, click the reset password button.

Q. As a capturer, when I search for a member, I receive no records?

A. Firstly try all of the fields in the search criteria e.g. Pension number, Id number, Persal number etc. If you still cannot access the record, send an e-mail to PCMonline with the personal and employment details of the exiting member for further assistance or alternatively speak to your respective CLO to determine if the member record exists on Civpen.

Q. As a capturer, when I search for a member, I receive records which state that the case does not have an ID number, date of birth, Pension number, Passport, Persal number. What should I do?

A. The above data is crucial to process the case. To proceed, send an email to PCMonline along with a screenshot of the screen to update the member's information on Civpen. Make sure to attach the necessary supporting documentation.

Q. When I try to create a case, PCM says that there is an existing benefit application in progress. PCM will not allow me to create the case.

A. PCM will not allow case creation if there is an application in progress through one of the GPAA's other exit processes. You can ask your CLO to investigate the member records to identify who has exited the member.

Q. I've created a case on PCM but I selected the wrong type of exit. Can I change my exit type?

A. Unfortunately you cannot change your exit type. You will need to request a withdrawal from your Verifier and then re-capture the case.

Q. I want to pend a case. How do I do that?

A. PCM has no pend functionality. PCM will auto save as you move from tab to tab. The case will always be available with saved information by navigating back to your inbox.

Q. I created a case, selected case type and filled in personal details tab. Why is the case not in my inbox?
> Q. How can I track the status of my case?

A. You can use the PCM Case enquiry function. Each PCM user can track the status of a case.

Q. Why can't I navigate to the tab that I want?

A. PCM will only allow you to move one tab forward or backwards. This is by design to move in a linear fashion.

- Q. While on the "Certification Details" tab, I noticed that personal details are incorrect. How do I fix it?
  - A. Send an email to PCMonline with the correct details. They will update it for you.
- Q. As a capturer, when I click submit on a case, it disappears from my inbox. Where is my case?

A. Your case has been sent to your employer Verifier. When it does get sent, it will automatically disappear from your inbox and be routed to your Verifier.

- Q. For the capturer role, the request case button disappears. Where is it?
  - A. The request case button will only become available if there are no cases in an inbox.
- Q. As a Case Admin, when I try to re-assign a case, the list box with assign names is empty?

A. You do not have rights to assign the case. Check where the case is. Odds are you are trying to re-assign a case that is currently not in the same pool as yourself.

Q. As a Case Admin, when I search for case, I get no return result even though the case is in the system.

A. As a Case Admin, you may only re-assign a case if the case you want to re-assign belongs to the same organization and business unit as you. Check if the case belongs to your organization and business unit. If you are sure it does and the problem still persists, send an email to PCMonline.

- > Q. I get a server error when processing my application. What must I do?
  - A. Many server errors in PCM are produced by internet connectivity issues. Log out of PCM, log into PCM again and try to capture the application again. If the problem persists, send an email to PCMonline with details on what you were trying to do when the error occurred. Make sure to send your username, the pension number/id number/persal for the case you are working on as well as a screenshot of the server error that you recei
  - B. ved. We will investigate the issue and get back to you.
- Q. I am not receiving emails from GPAA to say that my case was sent to GPAA. What must I do?

**PCM Employer** 

A. Your email is captured as part of your profile and was most probably captured incorrectly. Send an email to PCMonline with your current email address and ask them to update your email address.