

07 June, 2018

TO ALL OFFICES

**PF & PENSION FUND DEPTT. CIRCULAR NO. 06/2018**

**REG: 2<sup>nd</sup> OPTION OF PENSION FOR COMPULSORY RETIRED OFFICERS/EMPLOYEES**

Another Pension Option for joining the existing Pension Scheme was extended to the eligible category of officers/employees as per Bipartite Settlement/Joint Note signed on 27.04.2010, detailed guidelines for which were conveyed by IBA vide their Circular No. CIR/HR&IR/G2/665/90/2010-11/999 dated 10.08.2010. However, 2nd option of pension was not made available to the employees/officers who were compulsorily retired by the bank.

2. Recently IBA, vide letter No. HR&IR/CIR/G2/BRK/4684 dated 16-03-2018 has advised the Banks that 2nd option of pension may be allowed to all ex-officers/ex-employees who were compulsorily retired from bank's service **between 29-09-1995 to 27-04-2010** on same terms and conditions as are mentioned in Bipartite Settlement/Joint note dated 27.04.2010. As per the agreed terms and conditions of said Bipartite Settlement/Joint Note, Pension/Family pension shall be payable with effect from **27-11-2009** provided that employees/officers who are compulsorily retired after that date shall get pension from the respective dates of such retirement. In the IBA letter, it is inter-alia mentioned that Court cases, if any, in the matter may be withdrawn forthwith.

3. Accordingly, The Board of Directors in its meeting held on 14-05-2018 has approved to extend option for pension to Compulsory Retired officers/employees in terms of Joint Note/Bipartite Settlement 27.04.2010 provided they withdraw the court cases filed by them, if any, against the Bank for not extending pension option to them.

4. The pension option to be extended to compulsorily retired employees / officers, shall be to those who:

(a) were in the service of the bank prior to 29<sup>th</sup> September 1995 and compulsorily retired from bank's service **between 29-09-1995 to 27-04-2010** provided--

- exercise an option in writing within 60 days from the date of offer, to become a member of the Pension Fund and
- refund within 30 days after expiry of the said period of 60 days, the entire amount of the Bank's Contribution to the Provident Fund and interest accrued thereon received by the employees on compulsory retirement, plus 56% of the said received amount as his/her share in contribution towards meeting the funding gap as per the said settlement.

(b) the family of those employees who were in the service of the bank prior to 29th September 1995 and compulsorily retired from bank's service between 29-09-1995 to 27-04-2010 but have expired provided--

- the family of the deceased employees exercise option in writing within 60 days of the offer to become a member of the Pension Fund and
- refund within 30 days after expiry of the said period of 60 days, the entire amount of the Bank's Contribution to the Provident Fund and interest accrued thereon received by the deceased employee on retirement plus 56% of the said received amount as his / her share in contribution towards meeting the funding gap as per settlement.

5. Those who opt to join the pension scheme in terms of the settlement, Pension / Family Pension shall be payable to them with effect from 27.11.2009. However, employees compulsorily retired after that date i.e. 27.11.2009 shall be entitled to get pension after respective dates of their compulsory retirement. All the present Regulations of PNB Employees' Pension Regulations, 1995 shall be applicable to these employees.

6. As per PNB Pension Regulation 41 (8) (iii) an applicant who is compulsorily retired by the bank and is eligible for compulsory retirement pension under regulation 33 shall be eligible to commute a fraction of this pension subject to the limit specified in sub-regulation (1), after he/she has been examined by a medical officer approved by the Bank/Civil Surgeon/CMO. Provisions of Regulation 33 (I & ii) applicable for compulsory retirement pension would also be applicable to all such optees.

#### 7. PERIODICITY FOR EXERCISING PENSION OPTION AND REFUND OF AMOUNT

Sr. No.	PARTICULARS	STIPULATED PERIOD
1.	Date of submission of Option letters (Annexure I or VII) by compulsory retired employees/family members of the deceased employees who are eligible for pension option.	Within <b>60 days</b> from the date of pension offer through HRMS. <b>(15.06.2018 to 13.08.2018)</b> <b>Upto 5.00 P.M.</b>
2.	Refund of amount by the compulsory retired employees/family members of the deceased employees	Within <b>30 days</b> after expiry of the said period of 60 days. <b>(14.08.2018 to 12-09-2018)</b> <b>upto 5.00 P.M.</b>

**Please note, once the option is exercised and refunded the requisite fund, the pension option cannot be revoked. Any option not received or full amount of refund not made by the stipulated dates, will render the pension option invalid.**

CATEGORY OF PENSIONERS	APPLICABLE ANNEXURE
The employees/officers who compulsorily retired on or after 29 <sup>th</sup> September 1995 but prior to 27.04.2010	Annexure 'I'
The widow/ widower/ son/ unmarried daughter/ legally divorced daughter/guardian of the minor son/daughter of the retired employee/officer who were in service prior to 29.09.1995 but compulsorily retired between 29.9.1995 to 27.04.2010 and expired.	Annexure 'VII'

**8. (i) Procedure /instructions for submission of option forms by employees/officers who were in the service of the bank prior to 29th Sept 1995 and compulsorily retired on or before 27.04.2010**

- a) The Option has to be exercised during the period from **(15.06.2018 to 13.08.2018)** at any branch of PNB in India through HRMS only.
- b) Eligible Compulsorily Retired employees will have to submit the following forms duly filled in and signed in **4 copies** to any branch of PNB in India. The Branch will keep one copy with them, acknowledge second copy and give it to the employee and forward the remaining two copies directly to PF & Pension Fund Department, Head Office New Delhi.
- i. Application for option of Pension. **(Annexure- I)**
  - ii. Application for commutation **(Annexure- II)**
  - iii. Pensioner's Profile. **(Annexure- III)**
  - iv. Medical certificate issued by Bank's Doctor/Civil Surgeon/CMO **(Annexure IV )**
  - v. Nomination for Pension dues **(Annexure- V)**
  - vi. ID Form **(Annexure-VI)**
  - vii. Copy of Aadhar card and PAN Card of the applicant
  - viii. A copy of the punishment order awarded by the competent authority.

**Note:** The Medical examination should be carried out by Bank's Doctor/Civil Surgeon/CMO. The expenses, if any, related to the said medical examination including doctor's fees shall be borne by the applicant.

**8. (ii) Procedure /instructions for submission of option forms by the family of Deceased compulsorily retired employees/officers family who were in service prior to 29.09.1995 but compulsorily retired between 29.9.1995 to 27.04.2010 and died thereafter.**

- a) The Option has to be exercised during the period from **(15.06.2018 to 13.08.2018)** at any branch of PNB in India through HRMS only.
- b) Eligible family members will have to submit the following forms duly filled in and signed in **4 copies** to any branch of PNB in India. The Branch will keep one copy with them, acknowledge second copy and give it to the employee and forward the remaining two copies directly to PF & Pension Fund Department, Head Office New Delhi.
- i. Option for joining Pension **(Annexure- VII)**
  - ii. Application for family pension **(Annexure- VIII)**
  - iii. Family Pensioner's Profile. **(Annexure-IX )**
  - iv. Declaration regarding non-marriage/remarriage.**(Annexure-X and XI)**
  - v. Declaration regarding non-employment. ( in case of eligible son/daughter) **(Annexure-XII)**
  - vi. Any other relevant document such as copy of Death Certificate of staff, Aadhar card and PAN Card of the applicant
  - vii. A copy of the punishment order awarded by the competent authority.
- c) Once the compulsorily retired employee/officer or family member of deceased compulsorily retired employee/officer approach the branch for exercising option, the

branch will enter the pension option into HRMS (**as per navigation given in the annexure-XIII**) and inform to the optee, amount to be refunded in the account of pension trust. Thereafter branch will provide print of 4 sets of format as per list given at point number 8 above to be filled in and signed by the applicant. While receiving the sets of the formats, branch will keep one copy with them, acknowledge second copy and give it to the employee and forward the remaining two sets to PF & Pension Fund Department, Head Office New Delhi.

9. All the copies of Pension Option Forms should be duly signed by the applicant and countersigned by the authorized officials of the receiving Branch in original. No photo copy would be entertained.
10. The amount to be refunded by the retired employees/officers/family members can be deposited by them at any Branch of Punjab National Bank in India.

**11. PROCEDURE/ INSTRUCTIONS TO BE FOLLOWED FOR REMITTANCE OF FUNDS REFUNDED BY COMPULSORILY RETIRED EMPLOYEES/ FAMILY OF COMPULSORILY RETIRED EMPLOYEES.**

After submission of the pension option form by compulsorily retired employee or family of the deceased compulsorily retired employee, he/she has to refund the required amount on or before 12-09-2018. The amount can be deposited directly in **the intersol account number 39980031711160 of PF & Pension Division. While depositing the amount, it should be ensured that PF Number and Name of the employee/officer is invariably mentioned/entered in the system. Branch to ensure that this amount should not be kept into sundry account of the branch.**

The detail of the same be given in the following format through e-mail (pension@pnb.co.in) ([pf@pnb.co.in](mailto:pf@pnb.co.in)) to PF & pension Fund Deptt. The consolidated statement after the last date of refund be also sent to the PF Deptt as per the following format in Excel sheet.

Sr. No.	PF No	Name	Bank's contrib ution of PF and intt thereo n	56% of Bank's Cont	Total of 3 & 4	Branch	Circle	TM No. and date
	1	2	3	4	5	8	9	
1								
2								
		Total						

Total of column 5 should tally with the amount credited to our **intersol account number 39980031711160 of PF & Pension Division.**

12. All other terms and conditions as per PNB (Employees') Pension Regulations, 1995 as amended from time to time would remain applicable.
13. Please note that only after refund of amount by compulsorily retired employee / family of compulsorily retired employee to PF & Pension Fund Deptt. Head Office,

the proposal for approval of self/ family pension will be put up to the Competent Authority for approval of pension.

**14. Procedure to be adopted by PF & Pension Fund Department after receipt of Pension option forms and refund amount.**

Option forms received from the branches will be forwarded to the respective circles/HO Divisions from where the optee has retired to verify details and sanctioned of pension proposal. **Circle/HO Divisions to ensure that in case of CRS employees/officers, sanctioning authority would be one step higher than the Disciplinary Authority (DA).**

**15. Steps to be taken at Circle Offices/ HO Division**

- On receipt of the applications from the PF & Pension Fund Department, Circles/HO Divisions have to verify / make necessary corrections in HRMS, the details of employee such as Name, Date of Birth, Date of Joining, Date of CRS, Gender, Category, (Officer/Clerk/Sub Staff), PAN No, Aadhar Number and Branch from where the employee has compulsorily retired etc.
  - Thereafter, they have to forward the applications along with all annexures duly recommended/sanctioned to PF & Pension Fund Deptt, HO New Delhi through HRMS as well as physical forms.
  - **The competent authority to sanction pension for compulsory retired employees should be one scale higher than the Disciplinary authority.**
  - Circle to ensure that reasonable time be taken in processing the applications and inordinate delay be avoided.
16. All the applications are subject to scrutiny at the level of BO/CO/HO. In case applicant exercise the option and deposit the required amount and subsequently for any reason found not eligible to exercise the option or otherwise then his/her application would not be entertained and entire amount will be refunded without interest.
17. All the offices are advised to display suitable notice regarding exercising option for pension by Compulsorily Retired Employee. The required set of forms may be handed over to all the ex-employees, who are compulsorily retired and are desirous to opt for the pension. We seek your cooperation in complying with requirements and adhering to time schedule.
18. Please bring the contents of this circular to the notice of all the staff members working at your branch/office/department. A copy of the Circular along with the annexure is also available on HRMS and Bank's website.
19. For further clarification, if any, contact can be made with Shri Kuldeep Kaushal, Chief Manager Mob-9418060231-LL--011-28044412, Shri Anil Bhagat 9990255970 and Shri Deepak Bhatia- 9654917763

**Reeta Kaul  
General Manager (D)**

ANNEXURE-'I'**OPTION FORM TO BE FILLED IN BY THE COMPULSORILY RETIRED OFFICERS/EMPLOYEES, WHO WERE IN THE SERVICE OF THE BANK PRIOR TO 29<sup>TH</sup> SEPTEMBER 1995 AND COMPULSORILY RETIRED ON OR BEFORE 27<sup>TH</sup> APRIL 2010****Date of submission of Option letters (15.06.2018 to 13.08.2018) Upto 5.00 P.M.**

Date \_\_\_\_\_

To,

The Chief Manager,  
 PF & Pension Fund Department,  
 Head Office,  
 Dwarka,  
 NEW DELHI.

I hereby declare that I have read and understood the terms of the Settlement/ Joint Note dated 27.04.2010 for extending another option to join Pension Scheme. I have understood that the terms of the Settlement /Joint Note have been arrived at on the basis of the Unions/Associations offering to contribute 30% of the initial funding gap assessed for extending another option for joining the pension scheme. I am agreeable to the said contribution of 30% towards the funding gap and hereby voluntarily opt for Bank's Pension Scheme as per the provisions of the said Settlement/Joint Note. I undertake to refund the Bank's contribution to Provident Fund together with interest thereon paid to me on my compulsory retirement plus an amount equal to 56% of the Bank's Contribution to Provident Fund with interest received at the time of retirement being 30% contribution towards the initial funding gap in terms of Clause 3(c) of Joint Note dated 27.04.2010 and Clause 2(IV)(b) of the Settlement dated 27.04.2010.

Please tick a or b of the following:

- a. I confirm that I have not filed any case in any court of law against the bank in connection with pension option.

OR

- b. I have filed case in \_\_\_\_\_ Court for pension option; however, I have withdrawn the same. (Copy of the relevant order is enclosed)

Signature	
Name in Full	
Designation	
PF Account No.	

Present Residential Address	
Office from where retired and Name of the Controlling Office	
Contact Number / email	

---

(Signature/Thumb Impression)

**COMMUTATION OF PENSION****Date:** \_\_\_\_\_

The Chief,  
 PF & Pension Fund Department,  
 Head Office,  
 Dwarka,  
 NEW DELHI.

**REG: PF NO.** \_\_\_\_\_ **IN THE NAME OF** \_\_\_\_\_**Subject: COMMUTATION OF PENSION**

Dear Sir,

Please refer to my option letter dated \_\_\_\_\_ exercising option for pension. I had retired from service on \_\_\_\_\_ (Date) on superannuation / VRS/CRS. Kindly commute 1/3<sup>rd</sup> of my pension as per pension rules.

Thanking you,

Yours faithfully,

(Signature)

Name.....

Designation.....



**ANNEXURE -III**

Pensioners Photograph Joint with Wife
---

**PENSIONER'S PROFILE**  
**(PLEASE FILL UP IN BLOCK CAPITALS)**

- I. (1) Full Name \_\_\_\_\_  
 (FIRST NAME) (MIDDLE NAME) (SURNAME)
- (2) Sex. Male/Female \_\_\_\_\_
- (3) Identification Mark (if any) \_\_\_\_\_
- (4) Date of Birth \_\_\_\_\_ PAN No. \_\_\_\_\_
- (5) Date of Joining Bank service \_\_\_\_\_
- (6) Date of Ceasing to be in service \_\_\_\_\_
- (7) Mode of cessation from service Retirement on Superannuation /CRS
- (8) Category at Retirement Officer (Scale Grade) / Clerk / Sub-ordinate Staff
- (9) Provident Fund Account No. \_\_\_\_\_
- (10) Permanent Address \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_
- (11) Branch / Office of last posting \_\_\_\_\_
- (12) Branch from where pension payment is desired \_\_\_\_\_ Branch  
 \_\_\_\_\_ Zone
- (13) Savings Bank A/C No.(16 Digit) \_\_\_\_\_
- (14) Have you obtained Commercial Employment Yes/ No. If "Yes" please state date of Permission by the Competent Authority \_\_\_\_\_
- (15) If "No" do you intend to take up Commercial Employment? Yes/ No. If "Yes" please give reference of your application for Permission from the Competent Authority \_\_\_\_\_

## II. PERSONAL DATA OF THE SPOUSE :-

- (1) Full Name \_\_\_\_\_  
 (FIRST NAME) (MIDDLE NAME) (SURNAME)
- (2) Relationship with the Pensioner Wife / Husband
- (2) Date of Birth \_\_\_\_\_ PAN No. \_\_\_\_\_
- (3) Identification Mark (If any visible) \_\_\_\_\_
- (4) Permanent Address \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

## III. PARTICULARS OF FAMILY MEMBERS OTHER THAN SPOUSE (Family as defined under Regulation 1 of PNB (Employees') Pension Regulations, 1995

- |     | Name  | Relationship | Date of Birth |
|-----|-------|--------------|---------------|
| (1) | _____ | _____        | _____         |
| (2) | _____ | _____        | _____         |
| (3) | _____ | _____        | _____         |

I declare that the above information is true and correct. Should you however require any documentary evidence, I shall produce the same on demand.

Date:

Signature

Note : Please enclose 2 joint passport sized photographs of the pensioner with the spouse.

**ANNEXURE -IV****MEDICAL EXAMINATION BY THE BANK'S DOCTOR/CIVIL SURGEON/CMO****PART I**

The Applicant must complete the statement prior to his examination by the Bank's Doctor/Civil Surgeon and must sign declaration appended thereto in the presence of the doctor.

1.	Name of the Applicant (in Block Letters)	
2.	Date of Birth	
3.	Particulars regarding parents	
	a)	Father's age, if living and state of health
		Father's age at death and cause of death.
	b)	Mother's age, if living and state of health
		Mother's age at death and cause of death
4.	Have you been considered for grant of invalid pension? If so, state the ground.	
5.	Have you during the last three years period	
	a)	Suffered from any major illness requiring hospitalization? If so, the nature and period be indicated.
	b)	Undergone any major surgical operation
	c)	Lost or gained weight markedly.

**DECLARATION BY APPLICANT**

I declare that all the above statements are correct to the best of my knowledge. I am fully aware that by making a false statement willfully or concealing a relevant fact. I shall incur the risk of losing commutation.

Applicant's Signature/Thumb Impression  
(To be signed in presence of the Doctor)

**ANNEXURE-IV-----PART II**  
**(to be filled by Bank's Doctor/Civil Surgeon/CMO)**

1.	Apparent age	
2.	Height	
3.	Weight	
4.	Describe any scars or identification marks of the applicant	
5.	Pulse rate (a) Sitting (b) Standing	
6.	Blood Pressure (a) Systolic (b) Diastolic	
7.	Is there any evidence of disease of the main organs (a) Heart (b) Lungs (c) Liver (d) Spleen (e) Kidney	
8.	Investigations (If considered necessary) (a) Urine (b) Blood (c) X-Ray Chest (d) ECG	
9.	Any additional findings	

I have carefully examined Shri/Smt./Kumari \_\_\_\_\_ and am of opinion that:

He/She is in good bodily health and has the prospect of average duration life.

OR

He/She is not in good bodily health and it is not a fit subject of commutation.

OR

Although he/She is suffering from \_\_\_\_\_ He/She is considered a fit subject for commutation but his/her age for the purpose of commutation i.e. the age next birthday should be taken to be \_\_\_\_\_ years more than his/her actual age.

Place:

Date :

Signature & Seal of Bank's Doctor/Civil Surgeon/CMO

**ANNEXURE-V****FORM OF NOMINATION FOR PENSION DUES**

The Trustees,  
Punjab National Bank (Employees')  
Pension Fund Trust,  
NEW DELHI.

I, \_\_\_\_\_ hereby nominate the person named below under Regulation 51 of the PNB (Employees') Pension Regulations 1995.

Name and address of the Nominee	Relationship with Pensioner	Date of Birth of Nominee	Name and address of person who may received the said pension during the nominee's minority (if nominee is minor)	
(1)	(2)	(3)	(4)	
Name and address of other nominee in case the nominee under column (1) above pre-deceases the pensioner	Relationship with pensioner	Date of birth if the other nominee is minor	Name and address of person who may receive the pension during the other nominee's minority	Contingency on happening of which nomination shall become invalid
(5)	(6)	(7)	(8)	(9)

Place : \_\_\_\_\_

Signature (or thumb impression, if illiterate)

Date: \_\_\_\_\_

Name of the Pensioner: \_\_\_\_\_

Address: \_\_\_\_\_

**Witness:**

Signature: \_\_\_\_\_

Name & Address: \_\_\_\_\_

\_\_\_\_\_

Received on \_\_\_\_\_

Signature of Receiving Authority: \_\_\_\_\_

**IDENTIFICATION FORM**

1.	<b>NAME</b>	
2.	<b>SEX (MALE/FEMALE)</b>	
3.	<b>COMPLETE POSTAL ADDRESS</b>	
4.	<b>PHOTOGRAPH (JOINT WITH SPOUSE, IF ALIVE)</b> (Photograph should bear the signature & seal of the Branch Manager)  <i>If spouse not alive, Attach Death Certificate (duly attested)</i>	<b>AFFIX PHOTO HERE</b>
5.	<b>SPECIMEN SIGNATURE</b>	
6.	<b>LEFT/RIGHT HAND THUMB IMPRESSION OF THE EMPLOYEE</b>	
7.	<b>DATE</b>	

**FOR OFFICE USE ONLY**

**Signature & Seal of the Branch Manager with GBPA No. in token of having attested the above.**

**ANNEXURE-VII****OPTION FORM FOR THE FAMILY MEMBER OF COMPULSORILY RETIRED OFFICERS/EMPLOYEES, WHO WERE IN THE SERVICE OF THE BANK PRIOR TO 29<sup>TH</sup> SEPTEMBER 1995 AND COMPULSORILY RETIRED PRIOR TO 27<sup>TH</sup> APRIL 2010 BUT EXPIRED.****Date of submission of Option letters (15.06.2018 to 13.08.2018) Upto 5.00 P.M.**

Date \_\_\_\_\_

To,  
 The Chief Manager,  
 PF & Pension Fund Department,  
 Head Office,  
 Dwarka,  
 NEW DELHI.

Shri/Smt. \_\_\_\_\_ (Full Name) was an employee of Punjab National Bank last working at \_\_\_\_\_ Branch/Office. I, the spouse/son/unmarried daughter/legally divorced daughter/guardian of the minor son/daughter of the above named deceased employee, hereby declare that I have read and understood the terms of Settlement/ Joint Note dated 27.04.2010 for extending another option to join Pension Scheme. I have understood that the terms of the Settlement/ Joint Note have been arrived at on the basis of the Unions/Associations offering to contribute 30% of the initial funding gap assessed for extending another option for joining the pension scheme. I am agreeable to the said contribution of 30% towards the funding gap and hereby voluntarily opt for Bank's Pension Scheme as per the provisions of the said Settlement/Joint Note. I undertake to refund the Bank's contribution to Provident Fund together with interest thereon paid to Shri/Smt. \_\_\_\_\_ on his/her compulsorily retirement/ to the nominee or legal heirs on his/her death while in service plus an amount equal to 56% of the Bank's contribution to Provident Fund with interest received at the time of retirement being 30% contribution towards the initial funding gap in terms of Clause 3(c) of Joint Note dated 27.04.2010 and Clause 2(IV) (b) of the settlement dated 27.04.2010.

Signature or Thumb Impression of Widow/ Widower/ Guardian/ Son/ Unmarried daughter/legally divorced daughter	
Name of the widow/ widower/ Guardian/ Son/ Unmarried daughter/legally divorced daughter	
Relationship with the deceased employee	
PF No.	
Last Designation	
Date of Retirement	
Date of Death	
Present Residential Address	
Office from where retired and Name of the Controlling Office	

Contact Number / email	
------------------------	--

---

(Signature/Thumb Impression)

**ANNEXURE-VIII****FORM OF APPLICATION FOR GRANT OF FAMILY PENSION ON THE DEATH OF AN EMPLOYEE/PENSIONER**

The Trustees,  
PNB (Employees') Pension Fund,  
Dwarka, NEW DELHI.

**REG: APPLICATION FOR GRANT OF FAMILY PENSION**

I want to inform you that Shri/Smt. \_\_\_\_\_ who was serving at \_\_\_\_\_ (office) as \_\_\_\_\_ (Designation) died on \_\_\_\_\_ and being the spouse/family member of the deceased, I request for sanction of family pension. Necessary details are submitted hereunder:

1.	Name of applicant i) Widow/Widower/Son/Daughter ii) Guardian, if the deceased person is survived by minor child/children	
2.	Name and age of surviving widow/ widower and children of the deceased employee/pensioner	
S. NO.	NAME	RELATIONSHIP WITH THE DECEASED
i.		
ii.		
iii.		
iv.		
v.		
vi.		
3.	Name and No. of PPO (if any) of the deceased employee/pensioner	
3(a)	i) Whether the application is eligible to receive family pension from the Government on account of services rendered by the spouse in deference services.	
	ii) If yes, whether the applicant wishes to draw family pension from the Government or from the Bank.	
	iii) Details of PPO issued by the Government.  Name of the employee : _____ PPO No.: _____ Address of the PPO issuing authority: _____	
4.	Date of death of the employee/pensioner <b>(Copy of death certificate be enclosed)</b>	
5.	Office/Branch in which the deceased employee/Pensioner last served	
6.	If the applicant is guardian, his date of birth	



	and relationship with the deceased employee/pensioner	
7.	<p>Whether the applicant is already in receipt of Family Pension of Father/ Mother if so,</p> <p>i) Date of death and Retirement of Father/Mother</p> <p>ii) PPO NO.</p> <p>iii) Name</p> <p>iv) Amount of Family Pension</p>	<p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>
8.	Signature, Name And Address Of The Applicant	<p>SIGNATURE: _____</p> <p>NAME : _____</p> <p>ADDRESS: _____</p> <p>_____</p>
9.	Branch where Family Pension is desired to be paid and 16 digit account number be mentioned.	
10.	<b>ATTESTED BY</b>	<p>SIGNATURE: _____</p> <p>NAME : _____</p> <p>BRANCH/OFFICE SEAL: _____</p> <p>_____</p> <p>GBPA NO. _____</p>
11.	<b>WITNESSES</b>	<p>SIGNATURE: _____</p> <p>NAME : _____</p> <p>ADDRESS: _____</p> <p>_____</p> <p>A/C NO.,</p>

		IF ANY _____
--	--	--------------

**ENCLOSURES: -**

- (i) Identification Form as per annexure VI
  
- (ii) Certificate of age with four attested copies showing the dates of birth of the children

**ANNEXURE IX**

I. **FAMILY PENSIONER'S PROFILE**

- (1) Full Name of Applicant : Mr./Mrs./Ms.  
(in block letters) \_\_\_\_\_
- (2) Sex-Male / Female : \_\_\_\_\_
- (3) Identification Marks : \_\_\_\_\_
- (4) Date of Birth of Applicant : \_\_\_\_\_
- (5) Permanent Address of Applicant : \_\_\_\_\_  
\_\_\_\_\_
- (6) Branch from where pension Payment is desired : Branch/Circle  
Zone \_\_\_\_\_
- (7) 16 digit Savings Account Number : \_\_\_\_\_
- (8) Relationship with the Deceased Pensioner :  
(Widow / Widower / Son / Daughter) \_\_\_\_\_
- (9) Marital Status of the Applicant : Unmarried / Remarried \_\_\_\_\_

II.	Family members (only Sons / Daughters)	Relationship with Deceased employee	DD	Date of Birth MM	YY
(1)	_____	_____	_____	_____	_____
(2)	_____	_____	_____	_____	_____

I hereby declare that above information is true and correct. Should you however require any documentary evidence, I shall produce the same on demand.

\_\_\_\_\_  
Date : \_\_\_\_\_ (Signature / Thumb Impression)  
of family pension applicant

III. **PERSONNEL DATA OF THE DECEASED EMPLOYEE**

- (1) Full Name (in block letters) : \_\_\_\_\_
- (2) Date of Birth : \_\_\_\_\_
- (3) Date of Joining Bank's service : \_\_\_\_\_
- (4) Date when retired (if applicable) : \_\_\_\_\_
- (5) Date of Demise : \_\_\_\_\_
- (6) Name of Branch from where retired / :  
) ceased to be in service \_\_\_\_\_
- (7) Category at the time of Retirement / : Officer / Clerk / Substaff  
) Death (full time / part time) \_\_\_\_\_
- (8) Provident Fund Account No. : \_\_\_\_\_  
) \_\_\_\_\_

Sign. / Thumb impression Attested

**Declaration regarding non-marriage / re-marriage  
To be submitted by surviving spouse**

-----

The Assistant General Manager /  
The Chief Manager / Manager

\_\_\_\_\_ Branch

My Pension Account

I am / will be drawing Family Pension through your Branch. As required under the PNB (Employees') Pension Regulations, 1995 I hereby declare that till date I am, after the death of my spouse, not re-married. Further, in case I get remarried at any future date, I undertake to advise you / the Pension disbursing Branch immediately.

\_\_\_\_\_  
Signature / Thumb  
Impression

Place :

\_\_\_\_\_  
Name of the Pensioner

Date :

**Certificate from Branch Officer**

I hereby certify that to the best of my knowledge and belief the above declaration made by \_\_\_\_\_ signed in my presence is correct.

\_\_\_\_\_  
(Signature of Bank Officer with  
P.F. No-----.)

Place : \_\_\_\_\_

Name: \_\_\_\_\_

Date :

Designation : \_\_\_\_\_

**Certificate of Non-marriage to be submitted  
by unmarried Daughter / Son**

The Assistant General Manager /  
The Chief Manager

\_\_\_\_\_ Branch

I hereby declare that I am not married.

I undertake to immediately advise the pension disbursing Branch in case I get married at any future date.

\_\_\_\_\_  
Signature / Thumb Impression

Place :

Date : \_\_\_\_\_

Name of the Pensioner

The Assistant General Manager /  
The Chief Manager

\_\_\_\_\_ Branch

I hereby certify that to the best of my knowledge and belief the above declaration made by \_\_\_\_\_ signed in my presence is correct.

\_\_\_\_\_  
(Signature of Bank Officer with  
P.F No.-----.)

Place :

Name : \_\_\_\_\_

Date :

Designation : \_\_\_\_\_

**ANNEXURE XII****Declaration regarding non-employment (In case of eligible son/daughter)****Non-employment / Re-employment Certificate**

I, Shri / Smt. \_\_\_\_\_ (Pension Ref. No. \_\_\_\_\_ / Ex-gratia No. \_\_\_\_\_) hereby declare that I am not employed / re-employed under Government / Public Sector Undertakings / Autonomous Body. I further declare that I am not employed / re-employed or absorbed in a Central / State Government / Corporation Undertakings or in an Autonomous Body. In the event of my employment / re-employment I shall intimate the Bank as required in Pension Regulation No.40 (1) (b) / 50.

Signature

Date :  
 Name :  
 Pension Reference :  
 Address :

## Pension Option for CRS Employee

### Navigation in H.R.M.S---

Main Menu → Manager Self Service → Pension Option for CRS Empl.

- Click on Search Button as shown below :-

Favorites Main Menu > Manager Self Service > Pension Option for CRS Empl.


### PNB\_PENS\_PF\_GAP

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Limit the number of results to (up to 300): 300

Empl ID: begins with

**Search** Clear Basic Search  Save Search Criteria

- Click on Search Button and select the employee-id where application status is “BLANK” as shown below :-

## PNB\_PENS\_PF\_GAP

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Limit the number of results to (up to 300):

Empl ID:

Search

Clear

[Basic Search](#)



[Save Search Criteria](#)

### Search Results

View All      First  1-4 of 4  Last

Empl ID	Name	Distinctive No	Application Status
<a href="#">2473</a>	<a href="#">TEST 2473</a>	<a href="#">3997</a>	<a href="#">Finalized</a>
<a href="#">2474</a>	<a href="#">TEST 2474</a>	<a href="#">3997</a>	<a href="#">Finalized</a>
<a href="#">2475</a>	<a href="#">TEST 2475</a>	<a href="#">3997</a>	<a href="#">(blank)</a>
<a href="#">2476</a>	<a href="#">TEST 2476</a>	<a href="#">3997</a>	<a href="#">(blank)</a>

- Select whether pension is for Self or for Family Member. If it is for Family Member , enter the Death Date of employee.
- Enter a valid Mobile Number.
- Click on Print Button.



Empl ID	2475	TEST_2475	Application Status
Retired from Branch / Office :	3997	HO HRD DIVISION	Circle Office HEAD OFFICE

Option Submitted on Behalf of	<input type="radio"/> Self - Retiree <input type="radio"/> Eligible Family Member	Date of Death	<input type="text"/>
*Mobile Number		<input type="text"/>	<input type="text"/>

Amount Payable by Employee	
Bank's Contribution already Paid	50,000.00
Funding Gap (56% Bank's contrn.)	5,500.00
<b>Total Amount Payable</b>	<b>55,500.00</b>

\* Provisional Amount Subject to Change on Verification of Employee Record.

Branch to Provide complete set of forms in FOUR Copies to the Ex-Employee, in Terms of HO: PF / Pension Circular No.: 05/18 Dated: .

**Amount to be Remitted in HO: PF / Pension Department A/C No.: 39980031711160**

Submitted & Printed By   Submitted & Printed On

- Come to this module again , Click on Search Button and select the employee-id where application status is “Printed” as shown below :-

Favorites Main Menu > Manager Self Service > Pension Option for CRS Empl.

## PNB\_PENS\_PF\_GAP

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Limit the number of results to (up to 300):

Empl ID:

Search

Clear

[Basic Search](#)



[Save Search Criteria](#)

## Search Results

View All First 1-4 of 4 Last

Empl ID	Name	Distinctive No	Application Status
<a href="#">2473</a>	<a href="#">TEST 2473</a>	<a href="#">3997</a>	<a href="#">Finalized</a>
<a href="#">2474</a>	<a href="#">TEST 2474</a>	<a href="#">3997</a>	<a href="#">Finalized</a>
<a href="#">2475</a>	<a href="#">TEST 2475</a>	<a href="#">3997</a>	<a href="#">Printed</a>
<a href="#">2476</a>	<a href="#">TEST 2476</a>	<a href="#">3997</a>	<a href="#">(blank)</a>

- Enter the account number.
- Tick mark on (1 Copy given to Retiree / Family Member as Acknowledged/1 Copy Kept in Branch Office/ 2 Copies Sent to HO: PF and Pension Department)
- Enter the Date of copies sent to HO:PF & Pension Dept.
- Click on Accept button.

<b>Empl ID</b> 2475	TEST_2475	<b>Application Status</b> Printout Given to Retiree
<b>Retired from Branch / Office :</b> 3997	HO HRD DIVISION	<b>Circle Office</b> HEAD OFFICE

<b>Option Submitted on Behalf of</b>	<input checked="" type="radio"/> Self - Retiree	Date of Death
	<input type="radio"/> Eligible Family Member	
<b>Mobile Number</b> 9898989898		

Amount Payable by Employee	
Bank's Contribution already Paid	50,000.00
Funding Gap (56% Bank's contrn.)	5,500.00
<b>Total Amount Payable</b>	<b>55,500.00</b>
* Provisional Amount Subject to Change on Verification of Employee Record.	

Branch to Provide complete set of forms in FOUR Copies to the Ex-Employee, in Terms of HO: PF / Pension Circular No.: 05/18 Dated: .

**Amount to be Remitted in HO: PF / Pension Department A/C No.: 39980031711160**

Submitted & Printed By 340946

Submitted & Printed On 24/05/18 11:32:21.000000AM

Acceptance Details	
* Branch to Ensure Correctness of A/C No.	
<b>Account Number</b>	<input type="text"/>
<input checked="" type="checkbox"/> 1 Copy given to Retiree / Family Member as Acknowledged	<input type="checkbox"/> HO Acknowledges on Documents Received
<input type="checkbox"/> 1 Copy Kept in Branch Office	
<input type="checkbox"/> 2 Copies Sent to HO: PF and Pension Department	
<b>Sent to HO PF Dept On</b>	<input type="text"/>
<b>Accepted By</b>	<input type="text"/>
<b>Accepted On</b>	<input type="text"/>
	<input type="button" value="Accept"/>

[Return to Search](#) [Previous in List](#) [Next in List](#)

- Come to this module again , Click on Search Button and select the employee-id where application status is "Acceptance" as shown below :-

Favorites | Main Menu > Manager Self Service > Pension Option for CRS Empl.

## PNB\_PENS\_PF\_GAP

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Limit the number of results to (up to 300):

Empl ID:

Search

Clear

[Basic Search](#)



[Save Search Criteria](#)

### Search Results

View All      First  1-4 of 4  Last

Empl ID	Name	Distinctive No	Application Status
<a href="#">2473</a>	<a href="#">TEST 2473</a>	<a href="#">3997</a>	<a href="#">Finalized</a>
<a href="#">2474</a>	<a href="#">TEST 2474</a>	<a href="#">3997</a>	<a href="#">Finalized</a>
<a href="#">2475</a>	<a href="#">TEST 2475</a>	<a href="#">3997</a>	<a href="#">Acceptance</a>
<a href="#">2476</a>	<a href="#">TEST 2476</a>	<a href="#">3997</a>	<a href="#">(blank)</a>

- Enter Transaction ID.
- Enter Transaction Date.
- Enter Transaction Amount (Should not be less than Total Amount Payable).
- Click on Submit Button.

Empl ID	2475	TEST_2475	Application Status	Accepted & Annexure Sent to HO
Retired from Branch / Office :	3997	HO HRD DIVISION	Circle Office	HEAD OFFICE

Option Submitted on Behalf of	<input checked="" type="radio"/> Self - Retiree	Date of Death
	<input type="radio"/> Eligible Family Member	
Mobile Number	9898989898	

Amount Payable by Employee	
Bank's Contribution already Paid	50,000.00
Funding Gap (56% Bank's contrn.)	5,500.00
<b>Total Amount Payable</b>	<b>55,500.00</b>
* Provisional Amount Subject to Change on Verification of Employee Record.	

Branch to Provide complete set of forms in FOUR Copies to the Ex-Employee, in Terms of HO: PF / Pension Circular No.: 05/18 Dated: .

**Amount to be Remitted in HO: PF / Pension Department A/C No.: 39980031711160**

Submitted & Printed By 340946

Submitted & Printed On 24/05/18 11:32:21.000000AM

**Acceptance Details**

<p><b>* Branch to Ensure Correctness of A/C No.</b></p> <p>Account Number 1234567894123</p> <p><input checked="" type="checkbox"/> 1 Copy given to Retiree / Family Member as Acknowledged 1 Copy Kept in Branch Office 2 Copies Sent to HO: PF and Pension Department</p> <p>Sent to HO PF Dept On 10/05/2018</p> <p>Accepted By 340946</p> <p>Accepted On 24/05/18 11:45:02AM</p>	<p><input type="checkbox"/> HO Acknowledges on Documents Received</p> <p>Updated By</p> <p>Updated On</p>
---	---

**Transaction Details**

<p>Transaction ID <input type="text"/></p> <p>Transaction Date <input type="text" value="31"/></p> <p>Transaction Amount <input type="text"/></p> <p>Transaction Updated By</p> <p>Transaction Updated By</p> <p><input type="button" value="Submit"/></p>	<p><input type="checkbox"/> HO Acknowledges on Amount Received</p> <p>Updated By</p> <p>Updated On</p>
--	--