

Pension Checklist

<p>Checks to be exercised by Pension/Family pension sanctioning authority before forwarding pension papers to AG's office</p>	<p>While sanctioning Pension/Family pension and DCRG and forwarding the pension papers to AG's office for issuing the necessary authorities, the Head of Department/Office should ensure that:</p> <ul style="list-style-type: none"> (i) Nomination as submitted by the government servant are valid; (ii) Details of Family (Form 17) as recorded in the Service Book is up to date and list of family members as shown in Form 4 (Form for Assessing Pension and Gratuity) tally with Form 17; (iii) Documents as attached with pension papers i.e. birth certificate, adoption certificate, divorce certificate, death certificate, separation certificate, medical certificate (for invalid pension, physically handicapped children, commutation of pension) are issued by the competent authority; (iv) Family pension is sanctioned as per Rule 48 of the Pension rules, 1983 and under no circumstances is family pension sanctioned to other than family members; (v) In case of dispute where list of family members is not found recorded in the Service Book or where there is more than one claimant for family pension (for example where wife/spouse is alive but other persons are claiming the family pension on the strength of a succession certificate/affidavit), the Head of the Department/Office should investigate the case properly before sanctioning the pension/family pension in favour of any person and where it is found that the situation is not covered by the Pension Rules 1983, the matter should be referred for a decision to Finance (Pension Cell) Department/Law Department.
<p>Checks to be exercised by Pension/Family pension sanctioning authority with respect to the Service Book of the Pensioner</p>	<ul style="list-style-type: none"> (i) The correct date of birth is recorded in the Service Book. (ii) Date of continuous appointment in Government service is mentioned along with the Government/office order number under which appointed. (iii) Verification of service as per Rule 66 of Pension Rules 1983 has been done. (iv) Period of daily rated/work charged services (if any) has been duly certified as continuous by the Head of Office. (v) Entries in the Service Book have been made regarding leave/Extraordinary Leave/Leave Without Pay (whether on medical grounds or otherwise) availed by the Pensioner. (vi) Entries regarding increments allowed to the pensioner every year while in service till time of retirement. (vii) That entry have been made in the Service Book with regard to particulars and period of suspension/punishment/withholding of increment/regulation of suspension, if any. (viii) That pay fixed/ allowed as per the Third Pay Commission has been duly verified by the pay verification unit and this fact recorded in the Service Book. (ix) Entry in the Service Book noting the date of retirement and class of pension admitted. (x) That details of family (Form 17) as defined in clause (i) of Rule 48 of Pension Rules 1983 has been countersigned by the Head of the Department and pasted in service book of the government servant. Addition/alteration in the statement will be made by the Head of Office from time to time on receipt of information from the Government servant concerned as per Rule 52 of Pension Rules 1983. (xi) That the Service Book has been opened from the date of first appointment of the Government servant in the Prescribed Form. (xii) That every step in official's career has been recorded and each entry attested by the Head of Office who will also verify that the entries made are correct and there are no erasures, overwriting etc. in Service Book.
<p>Checklist of forms to be submitted in respect of Superannuation /Retirement/Voluntary/ Invalid Pension</p>	<ul style="list-style-type: none"> (i) Form 1: Nomination of DCRG when the Government servant has a family and wishes to nominate one member, or more than one member thereof. (ii) Form 2: Nomination of DCRG when the Government servant has no family and wishes to nominate a person, or more than one Person. (iii) Form 3: Form for sanctioning pension. (iv) Form 4: Form for Assessing Pension. (v) Form 5: Form of Memo of AG's office forwarding the Pension papers of a Government servant. (vi) Form 6: Surety Bond.

	<ul style="list-style-type: none"> (vii) Form 10: Certificate of verification of service for pension. (viii) Form 14: Medical Certificate. (ix) Form 17: Details of family. (x) Form 19: Department Datasheet (xi) Form 20: Regulation of Pay (xii) Form 21: Details of non qualifying service as per provision of Rule 18 & 20 of MCS (Pension) Rules, 1983.
Checklist of forms to be submitted in respect of Family pension	<ul style="list-style-type: none"> (i) Form 7: Form of Intimation for Family pension. (ii) Form 8: Form of Application for Family pension. (iii) Form 9: Form for sanction of Family pension. (iv) Form 11: Form for assessing and sanctioning Family pension and DCRG when a Government servant dies while in service. (v) Form 12: Form of letter to the AG's office forwarding papers for the grant of Family pension and DCRG to the family of a Government servant who dies while in service. (vi) Form 13: Form of Application of the grant for Residuary Gratuity on the death of a pensioner. (vii) Form 15: Indemnity Bond. (viii) Form 17: Details of Family. (ix) Form 18: Annual Superannuation Statement. (x) Form 19: Department Datasheet (xi) Form 20: Regulation of Pay (xii) Form 21: Details of non qualifying service as per provision of Rule 18 & 20 of MCS (Pension) Rules, 1983.
Checklist of Forms to be submitted in connection with Commutation of Pension	<ul style="list-style-type: none"> (i) Form for Commutation of Pension as per the Proviso of MCS (Commutation of Pension) Rules 1992. (ii) Form 2: Application for commutation within one year from the date of retirement. (iii) Form 3: Application for commutation after one year from the date of retirement along with medical certificate. (iv) Form 4: Nomination. (v) Form 7-7- Letter to the President. State Standing Medical Board. (vi) Form 8: Medical Examination Report. (vii) Form 9: Declaration by the Applicant.