

सम्मानआपकेविश्वासका



UCO BANK

HonoursYour Trust



Circular No-CHO/PMG/26/2023-24

Date:-08.09.2023

To All Branches and Offices in the Indian Union

Sub: - Initiation of Staff Family Pension- Submission of Documents in timely manner

Attention of Branches and Offices is drawn towards Head Office Circular No-CHO/PMG/14/96 dated 06.08.1996, CHO/PMG/7/97 dated 20.05.1997, CHO/PMG/11/2000 dated 05.09.2000, CHO/PMG/39/2014-15 dated 06.02.2015 and CHO/PMG/60/2021-22 dated 04.02.2022 for detailed guidelines regarding Settlement of Terminal Benefits- Gratuity, Provident Fund and Pension.

Inspite of strict directions, as conveyed from time to time, it is regretted that instances have come to the notice of the Bank that, Branches are either holding/ delaying the Family Pension application papers even after timely submission of the same by the Staff Family Pensioners or submitting incomplete application for sanction to Head Office, resulting in undue delay in sanction/ initiation of family pension due to which family pensioners face financial hardship. It also increases the complaints at various levels/ forums and tarnishes the image of the Bank.

Further, improvement is needed for faster disposal of Staff Family Pension applications.

We reproduce herewith steps to be taken by the branches for quick disposal of Family Pension applications:

- a) Soon after getting information of demise of a staff pensioner, branch should immediately intimate through Mail along with Death Certificate to Staff Pension cell, Head Office for stoppage of pension and recovery of excess pension (if any).
- b) Branch should coordinate with the family of deceased employee and assist them to complete the formalities for initiation of family pension (if otherwise eligible) as detailed in Annexure-A.
- c) Family pension application and relevant papers should be clear and properly attested by Branch Head/Official and are to be sent directly to Staff Pension Cell, PSD, Head Office.
- d) Needless to mention here that many Branches are inviting affidavit from the applicant for Family Pension which is not required. Hence, Branches are advised not to force the applicant for Family Pension to submit the same.
- e) In case the spouse (family pension applicant) opts for the existing joint account for family pension, branches should not insist on opening a new.



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account. However branches are advised to properly update the KYC and PAN details of survivor and deletion of deceased holder in the account.

Please note that any communication related to Staff Family Pension should be sent to **<u>ucohopension@ucobank.co.in</u>** only and hard copy should be submitted to---

"Staff Pension Cell Personnel Services Department, UCO Bank, Head Office-2, 2nd Floor, 3 & 4, DD Block, Sector-1, Salt Lake, Kolkata West Bengal-700064 Tel- 033-44559333/34/35"

Branches should display this circular to the notice board for the information to all Staff Pensioners.

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(Manish Kumar) General Manager HRM, PSD, OL & Training



Enclosures: i) Annexure-A- Complete Instruction ii) Annexure- B- Family Pension Application Form iii) Life Certificate Format



Annexure-A

REQUIREMENTS TO BE COMPLETED FOR INITIATION OF STAFF FAMILY PENSION

(1) Form Annexure-B (As attached herewith)

- It should be completely filled in all respects.
- Signature/Thumb Impression of the spouse of deceased employee, as the case may be, must be obtained on it.
- Annexure-B must be attested by the Branch Head with appropriate seal and signature.
- Photograph to be pasted on appropriate spot on Annexure B and the same should be attested by the authorized branch official.
- Right/Left Thumb Impression of the applicant, if obtained, must be duly verified by the authorized branch official.
- Proposed Pension Account number of the applicant must be SINGLE OPERATIVE account only.

(2) The following documents must also be sent along with Annexure-B Form:

- Copy of the Death Certificate of Deceased Employee- Duly verified with original by the authorized Branch Official.
- Forwarding letter from the Branch with recommendation by the Branch Head/ Asst. Branch Head.
- KYC Documents of the applicant (Aadhaar Card, Driving License, Passport etc,)- Duly verified with original by the authorized branch official.
- Life Certificate, Certificate of Non-Employment/Re-Employment and Certificate of Remarriage/Marriage (As attached herewith).

The complete set of all the documents, as explained above, is to be sent to: UCO BANK, HEAD OFFICE - 2 STAFF PENSION CELL, 2nd FLOOR, 3 & 4 DD BLOCK, SALT LAKE, SECTOR-1, KOLKATA – 700064, WEST BENGAL.

Any other query in this matter may be intimated to the Staff Pension Cell at: <u>ucohopension@ucobank.co.in</u>

(033) 44559333/34/35

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ANNEXURE B:- APPLICATION FOR STAFF FAMILY PENSION

1.	Name of the Applicant:		
		(Widow/Widower/Son/Daughter/Parent)	Affix latest Passport
2.	Date of Birth:	(DD/MM/YYYY); Contact No	size Photo of the Applicant with
3.	Name of the Guardian:		Official Seal and
		(if the deceased person is Survived by minor child or minor children)	Attestation by the authorized officer
4.	Relationship of the Guar	dian with deceased employee:	

5. Identification marks of the applicant: _____

6. DECEASED EMPLOYEE DETAILS:

9.

I	Name :	
li	EMP No. :	iii PDO NO. :
iv	Date of death :	

7. <u>Name, Relationship And D.O.B. Of Surviving Widow/ Widower & Children Of The Deceased Employee/Pensioner :</u>

SLNO	Name	Relationship with	Date of Birth	Age
		Deceased Pensioner		
1.				
2.				
3.				
4.				

8. Employment Details of the Applicant : (YES/NO); If Yes, Monthly Income: Rs. _____ /- (Per Month) (Affidavit/Income Certificate is essential as per the terms and conditions mentioned below)

10.	Name of Branch opted for payment of far	nily į	pensi	on : .	 		 	 	SOL	ID:	[
11.	Savings Bank A/c. No. of the Applicant:				 							1	4.

I undertake to repay/authorize you to recover from the pension/family pension/Commutation payable to me on the death of the above employee/retiree/pensioner any amount that may be due from him/her to the Bank. <u>I ALSO CONFIRM THAT I HAVE NEVER BEEN RE-MARRIED.</u>

(Signature OR thumb
Impression of the applicant)
Dated:

Full address of the applicant :

Attestation by Branch Head : (Full Signature with Name, Emp. Number and Seal) Dated: _____

<u>Required only if the Claimant is the Son /Daughter of the Deceased</u>:- Declaration in the form of affidavit stating that monthly income of the claimant from all sources does not exceed Rs.12,000/- p.m., proof of Age and confirmation of unmarried status. In case of parent:- Certificate of Income (i.e. does not exceed Rs 12,000/-p.m.)

	UCO		
	I. LIFE CERTIFIC	ATE OF STAFF PENSIONER	
Certified tha		mt	
(Name of the <i>he / she is a</i>	Pensioner) holder of Pension F live on this date His/Her prese	Payment Order No ent address is:	and
		Phone No	
Place:	Name		[
Date:	UCOBank	branch	Seal of
	Seal of the Chief Manag	ger/Senior Manager/Manager	Branch
	II . NON-EMP	LOYMENT CERTIFICATE	
	a Government or a State governr	neration for serving in any capacity nent or a Union Territory of a Govern April/ May to Octo	ment I Indertaking
	hat I have not been employed / r		
I have bee emolumer	en employed /re-employed in the nts during the period	Office ofand within the said year.	received the follo
l declare ti the Bank.	hat I have accepted Commercial	employment after obtaining / withou	t obtaining sanction
I declare t	hat I have / have not accepted a	employment after obtaining / withou ny employment under the Governme Bank. (Delete whichever of the abo	ent outside India
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I declare t obtaining / Place:	hat I have / have not accepted a without obtaining sanction of the Name of the Pensioner: On the left column pleas	ny employment under the Governmo Bank. (<i>Delete whichever of the abo</i>	ent outside India ve is Not Applica Signature
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