

Guidelines for processing Pension Papers by AGWB

Guidelines for processing pension papers

The retiring Government employee should submit Formal Application for pension in the prescribed form i.e. Form No. 5 to the Head of Office (HOO)/ Pension Sanctioning Authority (PSA) not less than one year in advance from the date of his/her date of retirement along with duly filled in

- Form C for commutation of pension (in duplicate),
- Nomination in prescribed form for payment of Life Time Arrear of Pension (LTA of Pension),
- Specimen signatures of the Govt. Servant (in 3 three separate slips) duly attested,
- Attested passport size Joint photograph of the Govt. servant and his/ her spouse (4 copies). In case of no spouse, four copies of single photograph of the Govt. servant,
- Details of Family members including date of birth and
- Application (in Annexure 'A') for payment of pension through specified public sector banks within the Kolkata Municipal Corporation Area if the pensioner so desires.

Procedure to be followed by AG,WB office for processing of Pension cases:

1. On receipt of pension papers complete in all respects from the Head of Office six months in advance from the date of superannuation of Government employee, the Principal Accountant General (A&E), West Bengal shall apply requisite checks for determining the admissibility of pension and gratuity and also family pension cases.
2. If any information/clarification is wanted, the Head of Office shall be contacted within 3 months from the date of receipt of pension papers.
3. Where no information/clarification is desired or where necessary clarification has been received from the Head of Office, the Principal Accountant General (A&E), West Bengal shall straightway issue (i) Pension Payment Order, (ii) authority for payment of gratuity and (iii) authority for payment of commuted value of pension one month in advance from the date of superannuation of the Government employee.
4. This Office shall send pensioner's copy of intimation letter regarding issue of Pension Payment Order and the authority for payment of retiring gratuity and commuted value of pension to the concerned Head of Office under whom the retiring employee is serving and the both halves of Pension Payment Order to the Pension Disbursing Officer, as chosen by the retiring Government employees, with the direction to start payment from the specific date as fixed therein.
5. When the retiring employees is in receipt of higher pay on the basis of interim orders passed by the Hon'ble High Court, Hon'ble Supreme Court of India, West Bengal Administrative Tribunal or where appeal, if any, preferred by the Government is pending, such higher pay may be taken into account for calculation of pension only on provisional basis till finalisation of the case. No gratuity or commuted value of pension shall be authorised in such cases till finalisation of the court case and issue of consequential Government instructions.
6. Where payment of pension/family pension is to be made in other State, the Special Seal

Authority for payment of pensionary benefits may be issued as usual to the concerned Accountant General, in whose audit jurisdiction the pensioner intends to draw pension.

Required Documents/ Check List for Pension Processing

The following documents/papers are required to be submitted to the Office of the Principal Accountant General (A&E), West Bengal with pension cases to ensure their timely disposal:

- In Single Comprehensive Form as prescribed under Memo. [No. 398-F \(Pen\) dt. 13.09.2012](#), no column in this Form should be left blank;
- Service Book with annual verification of service, proper noting regarding increment, pay fixation relating to promotion, career advancement, Pay Fixation Statement relating to ROPA Rules, date of birth, date of entry, leave, treatment of the period of suspension, extra-ordinary leave, full context of the order passed by the Hon'ble court/SAT in respect of the drawl of pay by the concerned Government employee and the Government Order issued in that regard etc.;
- Calculation sheet for qualifying service, pension, gratuity, commuted value of pension and family pension.
- Certificates including pay certificate, outstanding dues etc as given in ANNEXURE to the Memo [No. 1315-F \(pen\) dt. 14.10.1996](#);
- Attested passport size joint Photograph/Single Photograph (4 copies each);
- Three slips bearing specimen Signature/left hand thumb and finger impression of the pensioner/Family pensioner duly attested by the competent authority,
- Application for Pension in Form -5;
- Application for Family Pension in ANNEXURE-II;
- Sanction for Family Pension in Annexure-III or Specific Sanction
- Application for Commutation in Prescribed Form (Form C/Form A);
- Duly filled in Nomination Form (Form A) under Arrears of Pension (Nomination) Rules, 1986;
- Nomination for payment of Death Gratuity in prescribed form, duly counter signed by the Head of the office is required to be pasted in the service book. One set of such nomination is also to be forwarded to the Pr. Accountant General office along with Pension papers.
- Death Certificate/Medical Certificate (in case of death or invalidation);
- Authenticated Age proof Certificate (in the case of Family Pension to minor child);
- A Certificate to the effect that no case or appeal is pending in respect of drawal of pay of the concerned Government Servant;
- ANNEXURE -A, showing the name of the Branch of the Bank with B.S.R/IFS Code No. of paying branch of the bank from where pension/family pension to be drawn;
- Dependency Certificate in case of Family Pension to dependant parents;
- Income Certificate issued by an employer (if employed) or by any Central Government Officer/State Government Officer belonging to Group 'A' Service (if self-employed or in receipt of income from sources other than employment) in case of Family pension for life to unmarried/Divorced/Widowed daughter;
- Guardianship Certificate in the case of payment to minor child and to mentally retarded

son/daughter.

- Recent Disability Certificate issued by the Competent Medical Authority, Marital status (applicable for girl child) as well as a certificate to the effect by the Pension Sanctioning Authority that the handicap is of such a nature which prevents him from earning a living is to be furnished in case of Family Pension to handicapped son/daughter;
- Succession Certificate along with sanction in favour of the successor in cases where both the nominee for death gratuity as well as family members as defined in Rule 7(1)(e)(1) of the WBS(DCRB)Rules, 1971 do not exist.

Note: In cases where the payment of pensionary benefits/ family pension in respect of State Government employees is to be made in other State, the Head of Office (i.e. Pension Sanctioning Authority) should positively send the following pension papers in duplicate :-

- Single Comprehensive Form, as modified under Memo. No. 398-F (Pen) dt. 13.09.2012
- Pay Certificate in ANNEXURE to Memo. No. 1315-F (pen) dt. 14.10.1996
- Application for commutation of pension, where applicable
- Nomination for payment of Life Time Arrears of pension
- Application in Form No. 5 in addition to other papers/documents as usual

Documents to be Submitted along with the Pension case for un-married/ divorced or widowed daughters

- The Service Book of the Government Employee. In absence of Service Book, a certificate in terms of G.O. No. 732-F (Pen) dated 12/11/2008.
- Application for Family Pension in Annexure-II.
- Sanction for Family Pension in Annexure-III or Specific Sanction.
- Certificate to the effect that there is no other eligible member to receive Family Pension
- Recent Passport Size Photograph, Specimen Signature, Annexure 'A' (for drawal of pension through Public Sector Banks) and Descriptive Roll (4 copies each).
- Copy of Pension Payment Order of her father/ mother.
- Attested Copy of death certificate of her father/ mother.
- Attested copy of death certificate of her husband in case of widowed daughter.
- Attested copy of Decree of Divorce Certificate issued by the Court of Law in case of Divorced Daughter.
- A proof of her identity e.g. Voter Identity Card, Ration Card etc.
- An income certificate from the employer (if the claimant is employed) or from a Gazetted Officer of Central Government or a State Government Officer belonging to Group "A" service other than the same Department of the deceased employee.

Authorities for Pension Processing

Sl	Activity	Authority
----	----------	-----------

No.		Concerned
01	<p>Maintaining of Pension Register as prescribed in WBS (DCRB), 1971 as amended by GO No. 5977-F dated 27.06.1985 and preparing a list of employees under his control who will retire within the next 30/24 months on 1st January/ 1st July of each year in duplicate and sending a copy of the same to AG Office & Finance Department.</p> <p>Issuing a notice to the retiring Govt. employee two years in advance from the date of superannuation enclosing relevant papers (Form-5, Form C/Form A, Annexure A) with the direction to submit the said forms along with other documents one year in advance from the date of superannuation.</p> <p>Obtaining of a pay statement and calculation sheet showing admissible pension, gratuity, commuted value of pension and family pension from DDO when the Head of the Office is not the DDO himself.</p> <p>Preparing and sending pension papers along with duly filled in Single Comprehensive Form and Service Book, complete in all respects to AG Office six months in advance from the date of superannuation of the employee.</p>	Head of the Office/Pension Sanctioning Authority.
02	<p>Scrutiny for determining admissibility of Pension, Commuted Value of Pension, Retiring/ Death Gratuity & Family pension, on receipt of pension papers from the Head of the Office.</p> <p>Return of the case to the Head of the Office, in case any dispute in fixation of pay is noticed and/or any information or clarification is wanting.</p> <p>Sending of Admissibility Report for pensionary benefits along with Service Book, authority for gratuity and commuted value of Pension as well as the letters (both for the office and the pensioner) to the Head of the Office/ PSA **</p>	PAG(A&E), W.B.
03	<p>Issue of special seal authority for payment of pension, commuted value of pension & gratuity, if the pensioner desires to draw pension outside this State.</p> <p>** Authority for gratuity and commuted value of pension in respect of employees of the non-government colleges are sent to the concerned Pension Disbursing Authority instead of Head of the Office/ Pension Sanctioning Authority.</p>	PAG(A&E), W.B.
04	<p>Drawing of bill for payment of gratuity and commuted value of pension as authorized by PAG (A&E).</p>	DDO
05	<p>Order for sanctioning Dearness Relief/ Medical Relief/ Ex-gratia etc.</p>	Finance Department, Govt. of West Bengal/ Administra

		tive Deptt. concerned
06	Issue of general circular for payment of dearness relief/ medical relief/ ex-gratia grant to the authorized banks within the Kolkata Corporation area/concerned treasuries in the districts/ other Accountants General office as the case may be after receiving order from the Finance Department/Administrative Deptt./ Ministry etc. concerned.	PAG(A&E), W.B.
07	Disbursement of pension and other allowances (i.e. Dearness Relief, Medical Relief, Ex-gratia etc.) after receipt of Special Seal Authority/ Pension Payment Order/Government Orders/Circulars. Calculation of arrears of pension/family pension. Restoration of Commuted portion of pension Commencement of Family Pension on the death of the pensioner on receipt of application along with Death Certificate from the spouse. Obtaining remarriage/ unmarried/ re-employment/ un-employment/ life certificate of the pensioner/family pensioners annually.	Concerned paying Bank/Treasury.
07a	Transfer of Payment Point of Pension from one treasury to another within the State of West Bengal or one branch to another branch of same bank within Kolkata Municipal Corporation area may be accomplished directly by sending both halves of PPO with last payment certificate to the desired treasury or branch of the bank (through link branch) as the case may be under intimation to AG Office. However, where transfer of pension is intended from any treasury to any bank in Kolkata Municipal Corporation area or vice-versa and outside this State, both halves of PPO with last payment certificate to be sent to AG Office by the present Pension Disbursing Authority for further action.	Concerned paying Bank/Treasury and AG office
08	Accounting of Pension payment.	PAG (A&E), W.B.
09	Sanction of Family Pension to other eligible members viz. minor children/ physically/ mentally retarded child/ un-married/ widowed/ divorced daughters/ dependent parents, where both pensioner and spouse expired. Sanction of time barred claims over 3 years. Sanction of lifetime arrears of pension where no nomination for arrear pension exists. Disputes regarding fixation of retirement benefits.	Head of the Office/Pension Sanctioning Authority.
10	Any disputes regarding admissibility of pensionary benefits/ pay fixation/ service condition etc.	Finance Department, Govt. of West Bengal/

		Administra tive Deptt. concerned
11	Any grievance relating to payment of pensionary benefits through bank/ treasury.	PAG (A&E), W.B./ Dir. of Treasuries & Accounts/ Link Branch of PSB as the case may be

AG,WB Office issues Authorisation for the pensionary benefits in respect of the following:

- All employees of West Bengal Government guided by WBS (DCRB) Rules, 1971.
- All India Services Cadre, guided by All India Services (DCRB) Rules 1958 and opting for pension through the State of West Bengal
- State Judicial Officers including members of erstwhile Higher Judicial Services of West Bengal.
- Hon'ble Judges of High Court, Calcutta guided by High Court Judges (Condition of Service Act), 1954
- Teaching & Non-Teaching Staff of Non-Government Colleges including the Employees of Days Students' Homes.
- Teaching staff of Non-Government Primary School retired/died prior to 01/04/1981 and teaching and non-teaching staff of Secondary Institution retired/died prior to 01/04/1981.
- Teaching and Non-Teaching employees of DA getting (Secondary) Institutions.
- Pro-rata Pension as well as restoration of commuted portion of pension in respect of State Government Employees who are absorbed in Public Sector Undertakings or under a Corporation or Company wholly controlled by Central Govt. or State Govt.
- State Government employees guided by Bihar Pension Rules due to re-organisation of State.
- State Govt. employees of Hooghly district (Chandernagar) guided by French pension rule.
- Ex-management staff of North Bengal Medical College and Burdwan Medical College who opted for University rule.
- Pensionary benefits payable to the Hostel Cook/ Mess worker of Government/ Non-Governmental Colleges except colleges under Department of Health and Family Welfare, Government of West Bengal.
- State Govt. employees absorbed in B.E. College, Howrah (after declaring Deemed University) who opted to come under WBS (DCRB) Rules, 1971.
- Burma Ex-gratia allowance to the widows of Burma Army/Civilian pensioner.

- Chairman and Members of West Bengal Public Service Commission.
- Freedom fighters drawing monthly allowance from the State of West Bengal under 'Assistance to Freedom Fighters Scheme' formulated under Memo No. 4-APS dated 15/01/2013 or under Swatantrata Sainik Swamman Pension Scheme vide Memo. No. 815-FPS dated 25/07/2015.
- Gratuity admissible to the Ex-management staffs of R. G. Kar Medical College & Hospital, Chittaranjan Seva Sadan, Calcutta National Medical College, who have opted for CPF cum Gratuity Scheme.
- Other Government Pensioners/family pensioners intending to draw pension /Family Pension from the State of West Bengal.
- Transfer of place of payment of pension/family Pension within/outside this State.