

OFFICE OF THE ACCOUNTANT GENERAL (A&E), KARNATAKA, BANGALORE-1

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GUIDELINES FOR PREPARATION OF PENSION PAPERS

It is important and necessary that the pension papers in complete shape reaches the A.G.'s Office well before the date of retirement of a Government servant, at least 3 months in advance as per Rule 323 of KCSRs so that the retired Government servant gets his pensionary benefits in time. It is seen that around 70% of the cases are Superannuation cases in which the date of retirement is known. The Head of the Office should start the process of preparation of pension records 12 months before the retirement of the Government servant . He shall then arrange to forward the pension case with necessary documents through the Pension Sanctioning authority to the A.G. at least 3 months before the date of retirement. Accountant General is required to issue authorisation not earlier than 30 days of retirement of the government servant (Rule 335(1) of the KCSRs) if the case is received with complete documents as prescribed in KCSRs.

However in respect of Voluntary Retirement and cases of retirement on invalid grounds and family pension cases due to death of the Government servants, the pension papers are required to be sent as early as possible after the event.

To avoid hardship to the pensioner/family pensioner, Anticipatory pensions/Anticipatory DCRG can be paid by the department as per Rule 341 of the KCSRs, for a period of six months by the Head of Department. In such cases immediate action is required to be taken to forward the pension papers to the A.G. In case of any Departmental enquiry pending or Judicial proceedings pending against the Government servant, sanction for the payment of provisional pension only has to be communicated to the AG along with the pension papers and after conclusion of the departmental enquiry as per rules, communication has to be sent to the AG for the release of final pension, DCRG and CVP.

This brochure contains some useful tips/requirements to help in preparing pension cases of different classes of retirements. In order to settle the cases expeditiously, documents as mentioned are to be furnished. Our motto is to authorise pension to Government servant immediately after their retirement or as early as possible in cases of death/premature retirement.

GUIDELINES

Service Register

1. Entry of correct Date of Birth
2. Date of continuous appointment in Government service quoting orders under which appointed.
3. Entries in Service Register for having verified the services from time to time and all entries have to be attested by proper authority.
4. Period of Daily Rated/Work charged or contingency paid services if any duly regularised. Entries regarding re-employment, extension of service if any.
5. Notings regarding pay fixation, annual increments, leave EXOL/LWA (whether on medical grounds or otherwise) and regulation/postponements of increments accordingly. Notings of Suspension/Punishment/Withholding of increment regularisation of suspension period indicating effective dates of implementation etc., quoting orders of the competent authority.
6. Notings regarding date of retirement and Class of pension admitted.
7. In the case of employees of aided educational institutions TBS certificates as prescribed in TBS Rules are required to be recorded by the institution duly signed by the Secretary/Correspondent and countersigned by the Department.

Forms:

Medical certificate of unfitness in case of Invalid Pension and sanction order by competent authority in the prescribed Forms.

Verification of approved War service or Military service if any.

List of enclosures:

1. Three sets of specimen signatures in a separate sheet duly attested by Gazette Government servant
2. Three copies of passport size joint photographs of Government servant along with spouse in retirement cases. In respect of Family pensioner three copies of single photos of the spouse.
3. Three slips showing the particulars of height and personal identification marks duly attested.
4. List of family members with relationship, date of birth of each member and marital status in respect of daughters and the details regarding physically handicapped and mentally retarded children if any.

In respect of Superannuation/Retiring/Voluntary/Invalid cases etc.,

1. Form 7, forwarding letter, certifying information regarding Departmental Inquiry, NDC, Recovery of excess paid pay and allowances, withholding of entire DCRG or part thereof for unassessed dues if any etc., Also details regarding anticipatory pension/DCRG paid if any. A separate NDC is required in cases of Group B and Group A Officers duly attested by the Head of the Department or Government of Karnataka.
2. Nomination(if any) for claiming DCRG filed by the Government servant while in service.
3. Calculation of Pensionary benefits. Details of calculation of average emoluments for the last 10 months prior to the date of retirement or death and calculation of pension/DCRG should be shown on separate sheet or in prescribed format.
4. Details of Anticipatory pension/DCRG/CVP already paid
5. Consent for commutation of pension in the prescribed form duly signed by the pensioner.

In respect of Family pension:

1. Forwarding letter to A.G.
2. Form 9: Application for FP on the death of Government servant .
3. Form D: Form for sanctioning Family Pension.
4. Death certificate in respect of the Government servant.
5. Details of family members with Date of Birth including physically/mentally handicapped children if any, in order of birth. Date of marriage in respect of married daughters.
6. Indemnity Bond in stamp paper of appropriate value by the guardian claiming **DCRG** on behalf of minor/legal heirs of the deceased Government servant.(Rule 345 B Note 2)
7. Indemnity Bond in stamp paper of appropriate value by the guardian claiming **Family Pension** on behalf of minor legal heirs of deceased Government servant.(Rule 347 Note 1)
8. Guardianship certificate (Rule 347) in respect of payment of DCRG/Family pension to a minor.
9. If a child is physically handicapped/mentally retarded, a certificate in original by the competent medical authority certifying the extent of inability to earn livelihood.

While insisting that all the points mentioned in the guidelines above are to be strictly followed by the government/Department in the State, this Office as a Service Provider to the pensioners would like to bring out our commitments and resolutions made so as to release pensionary benefits well in time to the beneficiaries.

The commitments such as recognising the rights of the pensioner, to provide highest quality of service, understanding the responsibility as scrutinizing and authorising authority, to authorise pensionary benefits within 2 months from the date of receipt of cases, to attend to any deficiencies and complaints on top priority basis and to share the knowledge and information to all stake holders.

Therefore the Government and all the Departments in the State are requested to note the change in our attitude from an office goer to that of a Service Provider and to co-operate in the settlement of pension claims expeditiously by preparation of pension papers in full as per these guidelines and send the same to this Office.