

GUIDELINES FOR SUBMISSION OF PENSION PAPERS.

INTRODUCTION:

An important responsibility of a Head of Department ((HoD)/Drawing and Disbursing Officer (DDO) is to ensure that the pension papers of officers/staff under his administrative control are prepared as per Rule 65 and 66 of MCS (Pension) Rule 1983 and thereafter submitted to the Accountant General Office twelve months before the date of superannuation (Rule 67 of MCS (Pension Rules 1983). Coupled with this responsibility. The HoD/DDO is to ensure that the pension papers submitted to Accountant General office are correct and complete in all respects.

The AG Office receives a large number of pension cases where the pension forms are not properly filled/—in-complete particulars not furnished/authentication of HoD/DDO not given in the space provided, etc. Such cases have to be returned back to the HoD/DDO for rectification of the omissions and this results the pensioner not getting his/her pensionary benefits in time.

GUIDELINES ;

1. Annual Superannuation Statement (Form 18) must be submitted by the Department annually (Rule 56 (1) (2) and (3)of Pension Rule.)
2. It is important and necessary that the pension papers and relevant documents (Refer Rule 181 of MFR) in **complete shape** reach the AG Office well before the date of retirement (DoR) of a Government servant (**at least Six months in advance**) so that he/she gets his/her pension in time.
3. Rule 67 of MCS (Pension) Rules, 1983 enjoins upon the Head of Office to forward pension papers to Audit Officer **12 months** before the date of retirement with a covering memo in Form 5 along with service books/service rolls duly completed and up-to-date and any other documents relied upon for the verification of service claimed in such a manner that they can be conveniently consulted. The Head of Office shall undertake the work of preparation of pension papers in Form 4 two years before the date of retirement.(Rule 65) of Pension Rule.
4. In respect of Voluntary Retirement/Invalid/Family Pension, the pension papers are required to be sent as early as possible after the event.
5. To avoid hardship to the pensioners/family pensioners, provisional pension and DCRG can be paid to them as per the provisions of Rule 69 of MCS (Pension) Rules, 1983 read with Government of Meghalaya Finance (PC) Department OM No.FEM(PC)40/2009/82 & Rule 70 of MCS (Pension) Rules, 1983.
6. In order to settle the case expeditiously, documents as mentioned are to be furnished. The motive here is to authorise pension to the retired Government servant immediately after he/she retires or as early as possible in the event of death/premature retirement.

7. While sanctioning pension/family pension and gratuity by the Head of Department and forwarding to the Audit Officer for authorisation of pension and DCRG, they are to ensure that :-
 - i. Nomination as submitted by the Govt. Servant is valid (Refer Rule 43) of Pension Rule.
 - ii. Family details (Rule 52 of Pension Rule)
 - iii. No demand certificate from Estate Officer (Rule 57 of Pension Rule)
 - iv. Recovery and adjustment of Govt. dues (Rule 73 and 74 of Pension Rule)
 - v. Prompt disposal of Pension Cases (Rule 180 of MFR)
 - vi. Scrutiny of Pension application – (Rule 183 of MFR)
8. Documents to be attached with pension papers are birth certificate, adoption certificate, divorce certificate, death certificate, separation certificate, medical certificate (in connection with invalid pension, physically handicapped children, commutation of pension) are issued by the competent authority.
- iv. Family pension should be sanctioned as per provision of Rule 45 of MCS (Pension) Rules, 1983 read with clause 7 of the Meghalaya Civil Services (Pension) (Fifth Amendment) Rules, 2010. Under no circumstances can family pension be sanctioned **to other than family members. In disputed cases, where list of family members were not recorded in service book and 2/3 persons are claiming the same family pension on the strength of the succession certificate/affidavit, the Head of Department should investigate such cases properly as per rules before sanctioning the pension in favour of any person. In case, it is found not covered by MCS (Pension) Rule, the matter may be settle in consultation with the Finance (Pension Cell) Department or Law Department, etc.**

Forms be submitted while forwarding the pension papers :

i. **In respect of Superannuation/Retiring/Voluntary/Invalid case, etc :**

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| Form 1: | Nomination of DCRG when the Government servant has a family and wishes to nominate one member, or more than one member |
| Form 2: | Nomination for DCRG when the Government servant has no family and wishes to nominate one person, or more than one member |
| Form 3: | Form for sanctioning Pension |
| Form 4: | Form for assessing Pension and Gratuity |
| Form 10: | Form of Certificate of verification of service for pension |
| Form 14: | Form of Medical Certificate |

- Form 19: Department's Datasheet
- Form 20: Regulation of Pay
- Form 21: Details of non-qualifying service as per provision of Rule 18 & 20 of MCS (Pension) Rules, 1983.

ii. **In respect of Family Pension:**

- Form 7: Form of intimation to Family Pensioner
- Form 8: Form of application for Family Pension
- Form 9: Form for sanctioning Family Pension
- Form 11: Form for assessing and sanctioning Family Pension and DCRG when a Government servant dies while in service
- Form 12: Form of letter to Audit Officer forwarding the pension papers for the grant of family pension and DCRG to the family of Government servant who dies while in service.
- Form 16: Form of bond of indemnity for drawing of DCRG where there is no **nomination or nomination does not subsist**
- Form 17: Details of Family
- Form 19: Department Datasheet
- Form 20: Regulation of Pay
- Form 21: Details of non-qualifying service as per provisions of Rule 18 & 20 of MCS (Pension) Rules, 1983.

iii. Form for Commutation of Pension as per the proviso of MCS (Commutation of Pension) Rules, 1992.

- Form 1: Application for Commutation before retirement
- Form 2: Application for Commutation within one year from the date of retirement
- Form 3: Application for Commutation after one year from the date of retirement along with Medical Certificate

- Form 4:** Nomination
- Form 8:** Medical Examination Report
- Form 9:** Declaration by applicant

Note:- In case of any confusion or otherwise pl. Contact
Shri Ranjan Basumatary, Finance (Pension Cell)
Department -- Contact No. 9615169621.