

CHECKLIST FOR EXTENDED FAMILY PENSION CONVERSIONS

NAME OF THE CLAIMANT & RELATIONSHIP :-			DISABLED SON/DAUGHTER, UNMARRIED/WIDOW/DIVORCED DAUGHTER		
PENSIONER'S NAME, DESIGNATION					
DATE OF RETIREMENT AND UNIT			CGMT/CNTX/TF DEONAR/		
DATE OF DEATH OF PENSIONER					
SPOUSE NAME AND RELATIONSHIP STATUS			WIDOW/DIVORCED WIFE, VOID MARRIAGE		
DATE OF DEATH OF FAMILY PENSIONER					
Sr.No	COMMON DOCUMENTS REQUIRED	Sr.NO. (By DOT)	ATTESTED BY HEAD OF THE OFFICE	DETAILS TO BE CHECKED	REMARK
1	2nd stage Family Pension Application FORM 10		YES / NO	WHETHER ALL DETAILS ARE FILLED	YES / NO
			YES / NO	WHETHER ADDRESS IS MATCHING WITH ADHAR CARD DETAILS	YES / NO
			YES / NO	WHETHER BANK DETAILS ARE MATCHING WITH BANK MADATE/CANCELLED CHEQUE/PASSBOOK COPY	YES / NO
2	Details of Family given by Employee FORM 03 as per PENSION FILE/ SERVICE BOOK		YES / NO	WHETHER DOB, MARITAL STATUS AND DISABILITY STATUS IS MENTIONED	YES / NO
				WHETHER NAME OF THE CLAIMANT IS MENTIONED	YES / NO
	Details of Family given by CLAIMANT FORM 04		YES / NO	WHETHER DOB, MARITAL STATUS AND DISABILITY STATUS IS MENTIONED	YES / NO
				WHETHER ATTESTED BY UNIT	YES / NO
3	PPO Copy (Disburser's copy) form Bank/ Post Office		-----	WHETHER CASE IS MIGRATED	YES / NO
				LETTER ISSUED TO PDA FOR PENSION FILE	YES / NO
				LETTER ISSUED TO RECORDKEEPAER FOR SERVICE BOOK AND PENSION FILE	YES / NO
				DATE OF RECEIPT OF PENSION FILE/SERVICE BOOK	
				WHETHER EXCESS PENSION PAID HAS BEEN RECOVERED	YES / NO
4	Old PPO (Pensioner's Portion) Original Copy		-----	WHETHER SUBMITTED OR NOT(ORIGINAL/XEROX)	YES / NO
5	Death Certificate of the Father		YES / NO	WHETHER SUBMITTED OR NOT(ORIGINAL/XEROX)	YES / NO
6	Death Certificate of the Mother		YES / NO	WHETHER SUBMITTED OR NOT(ORIGINAL/XEROX)	YES / NO
7	Income Tax Return Copy of last three financial years		YES / NO	WHETHER SUBMITTED OR NOT(ORIGINAL/XEROX) F.Y.	YES / NO
			YES / NO	ANNUAL INCOME OF THE CLAIMANT	RS.
				WHETHER DECLARATION IS SUBMITTED	YES / NO
8	Income Certificate from Sub Divisional Magistrate (Not Required in Case of ITR Submission)		YES / NO	WHETHER SUBMITTED OR NOT(ORIGINAL/XEROX) F.Y.	YES / NO
			YES / NO	ANNUAL INCOME OF THE CLAIMANT	RS.
9	Affidavit for Family Member's Current Marital status and disability status		YES / NO	PAN CARD/ADHAR CARD	YES / NO
10	Afidavit for NOC by other Family Members		YES / NO		
11	Speciman Signature of the Claimant (3 Copies)		YES / NO	WHETHER SIGN MATCHING WITH FORM 10 SIGN AND PAN CARD SIGN	YES / NO

12	Finger Print of the Claimant (3 Copies)		YES / NO	WHETHER ATTESTED, BY WHOM		
13	Identification marks of the Claimant (3 Copies)		YES / NO	WHETHER ATTESTED, BY WHOM		
14	Photographs of the Pensioner/ Claimant (4 Copies)		YES / NO	WHETHER ATTESTED, BY WHOM		
15	Aadhar Cardcopy of the Claimant (2 Copies)		YES / NO	WHETHER ATTESTED, BY WHOM		
16	PAN Cardcopy of the Claimant (2 Copies)		YES / NO	WHETHER ATTESTED, BY WHOM		
17	If PAN Card not available, Birth Certificate/ School leaving Certificate of the Claimant		YES / NO	WHETHER DOB MATCHING WITH PAN CARD/ADHAR CARD/ PENSION PAPERS (ORIGINAL /XEROX)	YES / NO	
18	Bank Mandate form of the Claimant (2 Copies)		YES / NO			
19	Cancelled Cheque of the Claimant (2 Copies) / First page of passbook (2 Copies)		YES / NO			
20	Letter of undertaking for over payment (2 Copies) Format-9		YES / NO	WHETHER PROOF OF WITNESS IS SUBMITTED		
21	Pensioner's letter of Authority and undertaking		YES / NO			
22	Affidavit for being unmarried (Certificate of current marital status from Tehsildar), unemployed, no any other family pension and no any income source, dependent on parents during their life time and current marital and disability status of all family members obtained from Executive magistrate.		YES / NO	Original / XEROX		
23	In case of disabled son/daughter- Mention that the disability is such that not able to earn for livelihood					
24	FORMAT 13		YES / NO	WHETHER ALL DETAILS ARE FILLED		
				Whether family details of all living children are given		
25	Welfare Officer's Report (prepared by Welfare Officer in the presence of two neighbours and two Welfare Board Members and attested by Head of the Office)		YES / NO	Whether following points are covered		
				Whether any family member is disabled		
				Whether any family pension is already being paid		
				Whether dependent on parents during their lifetime		
				Whether income from any other source is there		
				Details of Movable/Immovable property /Own House/Rented House		
				Genuinness of the case and recommendation.		
				DOB, Relationship with the late pensioner, Qualification, Address, Marital Status, Physical Status, Whether employed/unemployed, Monthly Income, Dependant on , Name of the guardian, Relationship of the guardian, date of visit		
	MANDATED DOCUMENTS FOR DISABLED SON/DAUGHTER					
	If Disability/ Disability Certificate certificate obtained from,- (A) an authority competent to issue disability certificate in			DATE OF DISABILITY		

1	accordance with the Rights of Persons with Disabilities Act, 2016 (49 of 2016), the Rights of Persons with Disabilities Rules, 2017 and the guidelines and notifications issued by the Central Government or a State Government or a Union territory administration; or (B) a Medical Board comprising of a Medical Superintendent or a Principal or a Director or Head of the Institution or his nominee as Chairman and two other members, out of which at least one shall be a Specialist in the particular area of disability, setting out, as far as possible, the exact mental or physical condition of the claimant		YES / NO	WHETHER AFFIDAVIT FROM THE CLAIMANT FROM EXECUTIVE MAGISTRATE REGARDING DISABILITY IS SUCH THAT NOT ABLE TO EARN FOR LIVELIHOOD. DATE OF DISABILITY WHETHER SUBMITTED ORIGINAL/ZEROX		
2	If Disability (Blind) OR Mentally Retarded Legal Guardian Certificate, Photo ID, Address proof, Joint photo of Guardian and claimant, spicemen sign of Guardian/ Thumb impression		YES / NO			
	MANDATED DOCUMENTS FOR DIVORCED /DAUGHTER					
1	If Divorced, Divorce Documents (Original Divorce Deed)		YES / NO	Date of divorce with spouse		
	MANDATE DOCUMENTS FOR WIDOW DAUGHTER					
1	Marriage Certificate and Death Certificate of Husband		YES / NO	Date of death of spouse		
	FORM 10, FORM 4, FORMAT 13 & Welfare Officer's Report should be signed by Head of Department/ Head of Office only.					
	All Documents should be attested by Head of the Office only.					