

Instructions /Requirements from Pensioner for Credit of First Pension to his/her Account by Bank

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Office Memorandum

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Subject:- Requirements from pensioner for credit of first pension to his/her account by bank.

Attention is invited to CPAO's OM No.CPAO/Tech/Simplification/2014-15/52 dated-28.05.2014 whereby it was intimated to all concerned that pensioners were not required to visit the bank to activate their first payment of pension. It was also intimated that Undertaking for recovery of excess/overpayment of pension had been made a part of PPO. In spite of these instructions, banks used to insist on pensioners to physically appear in the bank before commencing first payment of pension. Consequently, CPAO had issued instructions vide OM No. CPAO/Tech/Life Certificate/2014-15/99-175 dated-28.07.2014 that banks should not insist on the pensioners to issue life certificate at the time of first credit of pension. They were also advised to identify the pensioner with reference to information already available with bank obtained through KYC at the time of opening of bank account. The above instructions were reiterated by OM No. CPAO/Tech/Bank Performance/2014-15/45 dated-02.06.2016.

However, it is observed that banks are still insisting upon the pensioners for completion of formalities like submission of life certificate, letter of Undertaking and certificate of non-employment to credit their first payment and other dues to their pension account resulting into inconvenience to the pensioners defeating the very purpose of simplifying the pension procedures.

In view of the above, Heads of CPPCs and Heads of Government Business Divisions of all the banks are advised to ensure that instructions issued by CPAO are followed by CPPCs and paying branches and any inconvenience to pensioners are avoided.

This issues with the approval of competent authority.


(Vijay Singh)
Sr. Accounts Officer (IT & Tech)

To,

1. Heads of CPPCs of all Banks
2. Heads of Government Business Divisions of all Banks