



कार्यालय महालेखाकार (ले व ह)-II, महाराष्ट्र  
सिविल लाईन्स, नागपुर-४४०००१  
OFFICE OF  
**THE ACCOUNTANT GENERAL (A&E) II**  
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## Pre-Retirement Checklist

**Objective:** To minimize post-retirement recoveries from pension and improve awareness of stakeholders

### 1. Service Records Verification

- Ensure the service book is complete, up to date, and attested.
- Verify date of birth, date of appointment, and retirement.
- All events of promotion, pay revision and MACP benefits are entered in service book.
- Updated Leave account, suspension orders, extraordinary leave (EOL) if any, is noted in service book.
- Ascertain Date of appointment and applicability of OLD Pension/ NPS Pension categorization.

**Objective:** Avoid wrong fixation proposal of pension due to missing or incorrect service entries.

### 2. Pay and Allowances

- Confirm latest pay fixation as per 7th CPC (and subsequent orders), duly verified and stamped by Pay Verification Unit.
- Verify increments, stagnation increment, and stepping-up cases.

**Objective:** Prevent over/under-payment that leads to recovery post-retirement .

### 3. Advances, Loans & Recoveries

- Close/settle all advances (e.g., HBA, car, festival, LTC).
- Verify GPF Advance balances are cleared.
- Confirm no outstanding dues with the office (e.g., computer advance, Govt. quarter dues).
- In respect of NPS – Family Pension case, Sanugrah Raashi paid amount if any, NPS Govt. Contribution and Interest recovery details are provided in Pension Proposal

**Objective:** To Prevent recoveries from gratuity/pension after retirement.

## 4. Retirement Benefits Documentation

- Submit pension papers at least 6 months in advance to AG office.
- Provide joint photograph with spouse, family details (for family pension).
- Updated nomination forms (DCRG, GPF, CGEGIS, leave encashment).
- Submit specimen signatures, commutation application (if opting).
- Online submission of form to the O/o the Accountant General (A&E)-II, Maharashtra, Nagpur for Sevaarth Cases.
- In respect of Primary and secondary school teachers and staff, attach School Recognition Certificate and also indicating start date of 100% grant for the institution.

### **Relevant documents for an OFFLINE case :**

Form 1 : Nomination for DCRG

Form 3 : Family Details

Form 5 : Application of retiring employee

Form 6 : Determination of qualifying service, pensionable pay, amount of pension, etc.

Form 7 : Forwarding letter

### **Relevant Document for a ONLINE Case :**

Printed copy of comprehensive online Pension application duly signed by pensioner and Pension sanctioning authority.

**Objective:** Avoid unnecessary delay in pension due to technical or conditional error. Ensure timely sanction of pension, commutation and gratuity.

## 5. Pension Account

- Confirm PAN is linked with your pension account.
- Provide bank account details (preferably joint with spouse).
- Ensure that the name as per service book matches with name in Bank account and Adhaar card

**Objective:** Avoid unnecessary delay in pension due to technical or conditional error. And to avoid delay in Pensionary benefits post retirement.

## 6. No Enquiry & No Dues Clearance

- No Enquiry & No Dues clearance certificate is provided with the proposal.
- Settle official accommodation dues (if any).
- Provisional Pension/ DCRG if any paid is reported in Pension Proposal

**Objective:** Avoid delay due to pending NEC & NDC.

## 7. Final Self-Check (One Month Before Retirement)

- No outstanding dues/loans.
- Pension papers submitted and acknowledged.
- Service and leave records verified.

- Family details updated.
- Awareness about commutation, pay fixation and recoveries intimated through the department

## 8. Sevaarth Online application Submission :

- Do not forget to press SUBMIT TO AG button at the time of submission of Physical Pension proposal with service book to AG office

**“Securing retired Lives - Our Service, Our Pride”**

**Thank you!**