

Following are checklists of documents to be forwarded by the DDO to the Accountant General Office in various types of pension cases:-

A. Superannuation/ fresh retirement cases – at least 1 year before the date of retirement of the employee, the DDO (pension sanctioning authority) should send the following to the AG office –

1. Form 1 – nomination for DCRG
2. Form 2 – particulars to be obtained from employee/ family of deceased employee
 - Four copies of passport size photos with and without spouse duly attested by the head of office or any other gazette officer authorized by him
 - Photocopy of Aadhar card of govt employee and family members eligible for family pension if any
3. Form 3 - Form for assessing pension, family pension, commutation of pension and gratuity
 - LPC (last pay certificate) generated from e-salary system (duly signed by DDO)
4. Form 4 – letter to the PAG for forwarding the pension papers of a govt employee
 - Undertaking regarding adjustment of long-term loans and advances and rent of govt accommodation (to be submitted by retiring govt employee)
 - 2 slips of 3 specimen signature or thumb impression of govt employee and spouse, duly attested by head of office or any other gazette officer authorized by him
 - Undertaking regarding refund of excess payment of pension, commutation and gratuity, if found at a later stage (to be submitted by retiring govt employee)
 - Option for medical allowance (to be submitted by retiring govt employee)- fixed or open
 - Certificate saying no judicial/ departmental proceedings are pending against the employee
 - Calculation sheet of pension, commutation, DCRG and family pension
 - Statement of qualifying and non-qualifying service with reference to entries of verification made in service book
5. Copy of order of retirement or death certificate
6. Service-book complete in all respects (date of retirement to be clearly indicated) – with last pay entered
7. Clearance certificate from vigilance department in case of group A and group B employees
8. Undertaking to be given by the govt employee with respect to period of service not verified
9. Descriptive roll – height, personal identification mark
10. Pan number (for deducting income tax at source)
11. No dues certificate

B. Extra documents required in case of special cases –

1. Medical certificate of incapacity (if the claim is for invalid pension)
2. Brief statement regarding re-instatement in case he/ she has been re-instated after having been suspended, compulsorily retired, removed or dismissed from service
3. CPF (central provident fund) share must be deposited in case of added service with detail pasted in Service book with challan
4. MC service for MC employees
5. Any case of withholding of DCRG (govt accommodation, license fee) sent by DDO to be written in forwarding letter (only according to rule 72(4) of HCS pension rules) –other deductions should not be entertained
6. In case of VRS – case is sent by DDO after retirement (because can be withdrawn during notice period) – pension eligibility from the first day after VRS
 - Copy of VRS orders

C. Death while in service - the family pension will be processed from scratch and so all the documents required in a normal case will be required including the following -

1. Death certificate of deceased employee
2. Income certificate (for other than spouse)
3. Dependent certificate (for parents)
4. Non-traceable certificate from the police (missing govt employee) + indemnity bond
5. Legal guardianship certificate (if no natural/ de-facto guardian is available)
6. Form 5
7. Form 6
8. Form 7
9. Form pen – 8 - Form of application to be submitted by the eligible family member for the grant of Family Pension on the death of a Government employee
10. Form 9 –
11. PAN for income tax
12. Aadhar number
13. Mobile number
14. E-mail ID

Death after retirement

(1). If spouse is alive – under the same PPO (rule 54 of Haryana Pension Rules)

1. AG office does not deal – spouse has to go to the treasury officer directly and submit the required docs (like if change in bank account is required)

(2). Spouse is not alive -

1. Death certificate – of the govt employee and the spouse (if applicable)
2. Income certificate (for other than spouse)
3. Dependent certificate (for parents)
4. Both halves of PPO (pensioner and treasurer)
5. Non-traceable certificate from the police (missing govt employee) + indemnity bond
6. Legal guardianship certificate (if no natural/ de-facto guardian is available)
7. LPC (last pay certificate)
8. Form pen -2 – particulars to be obtained from family of deceased employee
9. Form pen -3 – form for assessing pension, family pension, etc
10. Form pen -4 – Letter to PAG for forwarding pension papers
11. Form 7
12. Form 8
13. Form 9
14. Calculation sheet of family pension
15. 4 copies of passport size photographs
16. 2 sheets of 3 specimen signature
17. No dues certificate
18. No-inquiry certificate
19. No judicial proceeding pending certificate
20. Clearance certificate by vigilance department (for group A and group B)
21. Undertaking that the information provided by the family pensioner is correct to their knowledge
22. Details of any other family pension being drawn
23. PAN for income tax, Aadhar number, Mobile number, E-mail ID

(3). Disabled child – more than 40% disability (of the kind mentioned in HCS pension rules) –beyond the age of 25 for son (until he starts earning)

Medical certificate

(4). Divorced daughter – divorce case should have settled while mother or father were alive
Divorce papers

(5). Widow daughter – husband should have dies while mother/ father were alive
Death certificate of husband

D. Commutation after 1 year of retirement

1. Form 12
2. Form 13
3. Form 14
4. Form 15
5. Calculation sheet for commutation