

FORM 10-D (EPS)

(Supplied free of cost at EPFO Offices/can also be downloaded from epfindia website)

INSTRUCTIONS

(These Instructions sheets are not required to be printed for submission of the claim form and are not required to be attached with the claim.

These are only for information of the member/claimant)

THE EMPLOYEES' PENSION SCHEME, 1995
APPLICATION FOR MONTHLY PENSION

Note: Claim Form 10D should be submitted in two copies in case pension is to be drawn in other Region/Sub Region.

EXPLANATORY NOTE FOR THE APPLICATION:

Serial No given below relates to the corresponding number given in the application form.

1. By whom the pension is claimed?

Indicate anyone of the following under Sl. No. 1.

MEMBER	WIDOW	WIDOWER	MAJOR/ORPHAN
GUARDIAN	NOMINEE		DEPENDENT PARENT

2. Type of Pension claimed-

Indicate any one of the following

- a) SUPERANNUATION PENSION :By member on attaining 58 years age, whether in service or not
- b) REDUCED PENSION: By member after the age of 50 years but below 58 years and having left service
- c) DISABLEMENT PENSION: By member on leaving service on account of total and permanent disablement.
- d) WIDOW & CHILDREN PENSION: By family (spouse and children) on death of the Member.
- e) ORPHAN PENSION: By surviving son/daughter (of age up to 25 years as on date of death of member/spouse whichever is later) on the death or remarriage of the deceased member.

- f) NOMINEE PENSION: By nominee declared by the Member through his/her Form 2(R) in case the member had no family (Spouse and children).
- g) DEPENDENT PARENT: By the dependent father and mother of the deceased member who died without a family (spouse and children) and failed to nominate a person for pension.

Note: A member who has completed 58 years of / claimant on behalf of a deceased member who died after the age of 58 years without completing the eligible service of 10 years should apply for Withdrawal Benefit through Form 10C.

- 3: Please furnish the particulars relating to the member correctly.
 - (a) The name must be mentioned in BLOCK LETTERS.
 - (b) Marital Status: Whether married/unmarried/widow/widower/Divorcee.
 - (c) Date of Birth: In dd/mm/yyyy format.
 - (d) Father's Name and in case of a married female member, Husband's name in BLOCK LETTERS.

4. EPF Account Number: The account number should have the Region Code (two alphabets), Office Code (three alphabets) code number (maximum 7 digits), extension (sub code, if any, maximum three characters) and account number (maximum 7 digits).

The region codes have changed after creation of the multiple regions in some states, namely Maharashtra, Tamil Nadu, Karnataka, West Bengal, Punjab, Gujarat, Andhra Pradesh, Uttar Pradesh, Haryana and Delhi. For getting the correct Region and Office Codes, please visit **Establishment Search** facility provided under link for Employees through the epfindia website [epfindia.gov.in].

5. Name and Address of the Establishment where the member was last employed.

6. Indicate the actual date of leaving service. This need not be filled by a member who has attained 58 years and continues to be in service. In such case indicate, "still in service".

If the reason for leaving service was on account of total and permanent disablement, as indicated by the establishment to the P.F. Office through Form 10/Form 5 (PS)/ECR (Electronic Challan cum Return) then only the member is entitled for Disablement Pension. In all other cases the actual reason for leaving service may be given.

However, a member who continues in service beyond the age of 58 years may indicate "still in service."

8. If the present address is temporary one, also indicate permanent address.

8 A. If the member has left service before 58 years of age, has not completed 58 years age as on date of application and is ready for drawing reduced pension, he/she should mention the date from which /she wishes to get pension.

The opted date cannot be prior to date of attaining 50 years age and date of leaving service.

NOTE: Sl. No.9, 10 and 11 are applicable only to a member of the Pension Scheme and not for his/her family or any other claimant. Claimants applying for pension due to death of member need not fill in the details under serial number 9, 10 and 11.

For the members also, the serial number 9, 10 and 11 are applicable only if the date of start of member pension is before 26/09/2008 (cases where the application is being filed belatedly but the member is due for pension from such date). From 26/09/2008, the provisions for Commutation and Return of Capital have been abolished vide Notification Number GSR 688 (E) dated 26-09-2008 and any member who is due for pension from 26/09/2008 is not eligible for them.

9. Sl. No.9 is applicable only to a member of the Pension Scheme and not for his family or any other claimant. Claimants after death of member need not fill in the details under serial number 9, 10 and 11.

In case of a member who is entitled to draw pension from a date prior to 26-09-2008, he/she is eligible to commute upto a maximum of 1/3 of his pension so as to receive 100 times of the pension commuted. If a pensioner who is getting an original pension of Rs.600/-commutes 1/3 of it, he will get Rs.20, 000/- as commuted value. The commutation will be effective only from 16.11.1998. The applicant may give his option for commutation in the application and this will be effective and paid only if the member-pensioner continues to draw his pension as on 16.11.1998. On opting for commuted value of pension, the origin pension mentioned for Return of Capital will be the balance of pension after commutation.

Option for the commutation of Pension cannot be given if the Pension Start Date is on or after 26-09-2008 as this facility has been abolished vide Notification Number GSR 688 (E) dated 26-09-2008.

10. Sl. No.10 is applicable only to a member of the Pension Scheme and not for his family or any other claimant.

In case of a member who is entitled to draw pension from a date prior to 26-09-2008, he/she can give his option for return of Capital. Option once exercised is final. He may choose any one of the following and indicate the No. shown under alternative against Sl. No. 10 of the application.

Option for the Return of Capital cannot be given if the Pension Start Date is on or after 26-09-2008 as this facility has been abolished vide Notification Number GSR 688 (E) dated 26-09-2008.

Alternative	Quantum of Pension	Return of Capital
1.	90% of original	On member's death

	pension	100 times the original monthly pension to nominee
2.	90% of original pension to member. On his death 80% of pension to widow/widower.	On death or remarriage of widow/widower whichever is earlier. 90 times of original pension to nominee.
3.	87.5% of original pension for a fixed period of 20 years to member. On his death before 20 years, nominee will get pension for balance period.	At the end of 20 years, 100 times of original pension to member, if he is alive, otherwise to nominee.

11. The member is required to furnish the details of his/her nominee for receiving the Return of Capital. A member can nominate his/her spouse or sons or daughters. A married member who is not survived by any member of his family (spouse/sons/daughters) and a bachelor spinster may nominate a person of his/her choice to receive the return of Capital/Pension due if any, under Alternative 3 as per Sl. No. 10 above.

In case of option 2, spouse cannot be nominated as he/she will get 80% of pension along with widow pension. Nominee will get the amount only after death/remarriage of the widow/widower (spouse).

This field is applicable only if the Field 10 has been opted/member is eligible for opting ROC.

12. This should be completed by the member.

While the member pension is approved, the pension amount payable to the family (spouse/children) are also decided and in case of the death of the member as pensioner, the spouse/children/orphan will start getting the pension on submission of the death certificate and there will

not be any requirement of processing of the widow/children/orphan pension again.

In case of a deceased member, it has to be filled by the spouse/children. The list of surviving family members of the Member, covering his spouse, all children should be furnished. The particulars of Guardian should be given in respect of each minor child, as of the date of application. In support of the age of children, age proof certificate obtained from the school or Registrar of Birth-death or E.S.I. Record, or Municipal authorities should be enclosed. In the case of Guardian other than natural guardian, a Guardianship Certificate should be enclosed.

13. Applicable only in case the member is not alive. In support of the date of death, death Certificate should be enclosed.

14. The details of Bank S.B.A/c No for receiving the pension should be given.

In case the claim is preferred by spouse, he/ she should give his/her S.B.A/c No. and also separate S.B.A/c No.s in respect of each child. S.B. A/c No.s of children who are below the age of 25 years (as on date of death of the member) should be given. On behalf of minor child, S.B. A/c opened in the name of minor and operated by the guardian of the minor and A/c No. should be given.

Pension is payable through any branch of certain Bank depending on state where the pensioner want to receive pension by credit to the S.B. A/c No.s of eligible pensioners. Hence S.B. A/c should be opened only in the said Bank(s). Necessary guidelines have been given to all the branches of the said Banks to open a S.B. A/c for the pensioners. The applicant may approach any branch of the said Bank(s) to open the account. **Click here to see the List of Banks where Pension Account can be opened.**

The member, the spouse and children (minor or major) should necessarily open S.B. A/cs in the same branch of the Bank.

Whenever pension is opted from a place beyond the jurisdiction of the region in which the member was last employed, he should ascertain the name of the designated bank applicable in that Region and open a S.B. A/C therein.

On sanction of Pension, intimation will be sent to the pensioner to contact the bank.

14- A. In case of death of the member before attaining 58 years without leaving any eligible family members to receive the pension, the nominee as appointed by the member through the Form 2 (Revised) already sent to the P.F. Office may apply, giving his particulars against this column.

In case the member had no family and had died before appoint a nominee for pension, his/her dependent parent (father & mother) may apply for pension, pension will be paid to father and on his death to mother.

15. In case the member was working in different establishments and obtained Scheme Certificate, the details should be furnished against this column. In case, no Scheme Certificate was received or not applied for the same, the details of past employment may be indicated in this column.

16. If the applicant is already receiving pension under Employees' Pension Scheme, 1995 claim pension, the details should be furnished against this column.

17. List of documents to be enclosed and specified under Column No.17:

a) Descriptive role of pensioner and his/her specimen signature/Thumb impression (in duplicate); (Form is enclosed with the Claim Form)

b) 3 pass-port size photographs

If claimed by the member Joint photo with spouse, there is no need to send photograph of the children.

If claimed by widow/widower the photograph should be sent for widow/widower and his/her two children (below 25 years) separately.

The photographs should be attested by the employer or his authorized official, indicating the person, whom the photograph relates to and also the P.F. Account No. of the member, written on the verse and placed in a separate envelope.

- c) In the case of a member, who is permanently and totally disabled during the employment, he/she should undergo a Medical Examination before the Medical Board advised by the E.P.F. Office. However, the disablement should occur while in employment.
- d) The application should be forwarded through the establishment in which the member last served/died. The establishment should furnish the certificate and wage particulars duly attested by the authorized officer.
- e) Only if the establishment is closed, the application should be forwarded through Magistrate/Gazetted Officer/Bank Manager/any other authorized officer as may be approved by the Commissioner.