Date: 03.07.2021



HO:BR:113:156

Operations & Services Department Head Office, Baroda

CIRCULAR TO ALL BRANCHES / OFFICES IN INDIA

Dear Sir / Madam,

Re: Continuation of Staff Pension account by Family Pensioner in case of death of first holder .(Staff Pensioner) w. e. f. 06.07.2021.

Bank allows to open joint account for staff pension with their spouse. At the time of pensioner's death first name is not allowed to be deleted by the system. As the spouse would be eligible for family pension, pension account will be continued by family pensioner but as the name of widow/spouse of the staff family pensioner is as second holder the staff rate is not provided by the system and hence they are forced to close this account and open a new account which causes inconvenience to family pensioner of the staff.

In order to continue the same account of staff pensioner in case of his/her death and to provide staff rate to family pensioner, branches are advised as under:

- 1. To accept application from family pensioner of staff along with Death certificate and Copy of PPO.
- 2. Name of Family Pensioner should be verified from PPO.
- 3. Primary holder i.e. Staff Pensioner should be marked deceased.
- 4. Joint holder who is family pensioner, his/her customer id should be made primary customer id using menu HCCA. But before replacing the primary customer ID " Joint Customer Id should be made as Staff by selecting the Staff Flag as Y and also giving the EC No of deceased employee using MRCR"
- In HACM menu, the Relation Code under Related Party tab FPS (Family Pensioner of Staff) option should be selected through menu HACM and Name of deceased staff pensioner should be entered in the system in the field "Notes" that first holder –Name of the staff _____EC No. _____deceased on ____(Date)

If name is long, it may be written in short. Detail Job Card is attached. **Please note this process is only for staff pensioner**.

Please ensure compliance.

Yours faithfully,

Pankaj Mittal General Manager (Operations & Services) \bina 2021\circulars\restriction on opening accounts at branch.docx

> प्रधान कार्यालय – परिचालन एवं सेवाएँ विभाग, " बड़ौदा भवन ", 7वां तल, आर सी दत्त रोड, अलकापुरी, बड़ौदा–390007. भारत. Head Office - Operations & Services Dept., "Baroda Bhavan", 7th Floor, R. C. Dutt Road, Alkapuri, Baroda - 390007. INDIA. फो./T : 0265-2316769, ई-मेल/E : operations.ho@bankofbaroda.com

Annexure to HO:BR:113:156 03. 07.02021

JOBCARD – Mandatory Updation of RELATION CODE in Staff accounts

1. Staff accounts :

- a) Select Relation code as "SELF" for the Relation Type : MAIN in the related party tab of HACM menu.
- b) Kindly verify the same using menu HACM

Following is the sample flow for updating RELATION CODE in HACM menu:

• Invoke the menu HACM

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• Select RELATION CODE as "SELF" from the searcher for the RELATION TYPE "MAIN"

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• Click on SUBMIT and verify using menu HACM.

2. Staff Family pensioner accounts :

- a) Select Relation code as "FPS (Family pensioner of Staff)" for the Relation Type: MAIN in the related party tab of HACM menu.
- b) Name of deceased will be entered in the field "Notes" that first holder Name of the staff______ EC No. deceased on _____(Date)
- c) Kindly verify the same using menu HACM

Following is the sample flow for updating RELATION CODE in HACM menu

• Invoke the menu HACM

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• After clicking on GO, visit RELATED PARTY tab

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• Select RELATION CODE as "FPS" from the searcher for the RELATION TYPE "MAIN"

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• Enter the Name of Deceased staff and Deceased on Date in the Field "NOTES"

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• Click on SUBMIT and verify using menu HACM.

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For any assistance, Branch may lodge a request at Global Help Desk Portal URL <u>http://helpdesk.bankofbaroda.co.in:8080/SM/ess.do</u> OR Contact on 9999999 through IP Phone OR Lodge a call with LOCAL HELP DESK /CBS operations team may be contacted. *******