

FORM B2

[See Regulation 4,19 and 20]

**Claim and Payout Form: Unified Pension Scheme (UPS) subscriber who
superannuated/retired on or before 31/03/2025****Before filling the form, please read the INSTRUCTIONS carefully given at the end of the form**Joint Photograph of
Subscriber & spouse**PART -A (to be filled by the subscriber)****1.Detail of Subscriber:**

Name		Employee Code/ID		PRAN	
Date of birth		Date of Superannuation/ Retirement under FR 56(j)		Date of joining service	
Gender		PAO (<i>office name</i>)		DDO (<i>office name</i>)	
PAN		Ministry/Department (<i>from where retired</i>)			

2. KYC details:

Document (<i>one of the documents</i>)	Document Type	Identification number	Validity (<i>in case of Passport and Driving License</i>)
Aadhaar*/ Driving License / Passport/Voter ID/CKYC/ Letter issued by NPR			

3. Current Address:

Flat/House No./Bldg. Name		Street/Locality	
Village & Post Office/Block		City/District	
State		Pin Code	
Country			

4.Contact Details:

Telephone No. (If any)		Mobile No.	
E-mail ID			

5. Details of legally wedded spouse as on date of superannuation:

Name		PAN*	
DOB		Aadhaar No.*	
Gender			
Mobile No.		E-mail Id	

6. Details of Bank account:

Type of Bank A/c	Joint with legally wedded Spouse as on date of superannuation Single (only in the absence of legally wedded Spouse as on date of superannuation)	Bank A/c No.	
Bank Name		IFSC	

Note: Please ensure that the Government servant is the Primary Account holder in the Joint Account.

Declaration:

I _____ Son/Daughter of Mr./Mrs. _____ a subscriber of National Pension System with PRAN----- and have fully read and understood the provisions of Unified Pension Scheme (UPS) as notified by GoI vide notification F. No. FX-1/3/2024-PR, dated 24/01/2025 and PFRDA (Operationalisation of Unified Pension Scheme under National Pension System) Regulations, 2025 as amended from time to time. I hereby declare that I am eligible to avail benefits under UPS in terms of the aforesaid notification and Regulations. I certify that the information given above is true and correct.

I authorize the CRA, NPS Trust or any other entity connected with UPS to collect and share data/ details of my necessary personal information for the purpose of the said scheme regulated under the PFRDA Act, 2013 and the relevant regulations notified thereunder.

Place: _____

Signature: _____

Date: _____

Name: _____

PART -B (Details as recorded in the CRA system)**1. Details of Partial Withdrawal:**

S. N.	Date of Partial withdrawal	Amount withdrawn	No. of units withdrawn as per default pattern	Default pattern NAV on the date of superannuation	Value of partial withdrawals (<i>no. of units withdrawn * NAV</i>) as per default pattern, as on date of superannuation
1					
2					
3					
Total					

2. Details of voluntary contribution:

S. N.	Date of voluntary contribution	Amount of voluntary contribution	No. of units allotted	NAV on the date of superannuation	Value of voluntary contribution (<i>no. of units * NAV</i>) as on date of superannuation
1					
2					
3					
...					
n					
Total					

3. Details for calculation of UPS benefits payable to subscriber:

	Individual Corpus (IC): Value of corpus as on date of superannuation/retirement	
	Benchmark Corpus (BC): Value of IC as per default pattern of Investment + Value of partial withdrawals amount at the time of Superannuation as per default pattern - value of voluntary contribution on date of superannuation/retirement	

	Final withdrawal (FW in %)	
	Representative Annuity Rate (<i>as on date of superannuation, as published by PFRDA</i>)	
	Representative annuity amount= (IC) x (1-FW%) *(Representative Annuity Rate)/ (12*100) where {IC <= BC}	

PART -C (to be filled by the DDO in the CRA system)

1. Employment Details as per service record:

	File no	
	Employee Code/ID	
	Date of commencement of qualifying service (<i>Qualifying Service as defined in Regulation 2(k) read with Regulation 13</i>)	
	Date of Superannuation/ retirement under Fundamental Rules 56(j) (which is not treated as penalty under Central Civil Services (Classification, Control and Appeal) Rules, 1965)	
	Length of Qualifying service in months (Q)	
	Length of qualifying service in completed half years (L) (<i>fraction to be ignored</i>)	
	Date of Start of monthly Payout (<i>in case of superannuation, next day of superannuation or in case of retirement under FR 56 (j), next day of retirement</i>)	

2. Basic pay details for last 12 months before superannuation/ retirement under FR 56 (j):

	Basic Pay	NPA (<i>non-practicing allowance granted to medical officer in lieu of private practice</i>)	Total (Basic pay +NPA)		Basic Pay	NPA (<i>non-practicing allowance granted to medical officer in lieu of private practice</i>)	Total (Basic pay +NPA)
Month 1				Month 7			
Month 2				Month 8			
Month 3				Month 9			
Month 4				Month 10			
Month 5				Month 11			
Month 6				Month 12			
Average of 12 Months of (Basic pay +NPA) = P							

3. Salary details of last month before superannuation/ retirement under FR 56 (j):

Month/Year	Basic Pay (<i>includes non-practicing allowance granted to medical officer in lieu of private practice if any</i>) (BP)	Dearness Allowance (DA)	Total E= (BP+ DA)
Last month emolument (E) for lump-sum payment			

Certified that the details provided by subscriber in **Part-A**, details of employment and salary i.e., qualifying service, last basic pay, average basic pay, superannuation/retirement date, legally wedded spouse details on the date of superannuation, which has been verified by HOO and the entry has been made as per such certification.

Verified and certified that the details are true and correct.

Signature & Name of DDO	
DDO Name	DDO Registration No.
Date:	Place:

Form B2
Part D
UPS Payout Order (UPO) issued by PAO
(System Generated)

Joint Photograph
of
Subscriber & spouse

To,
National Pension System Trust
 (address to be added) – system

File no:		Date of issue:	
UPS Payout Order (UPO) No:			

1. Details of subscriber:

Name		Employee Code/ID		PRAN	
Date of birth		Date of Superannuation/ Retirement under FR 56(j)		Date of joining service	
Gender		PAO (<i>office name</i>)		DDO (<i>office name</i>)	
PAN		Ministry/Department (<i>from where retired</i>)			

2. Details of legally wedded spouse on the date of superannuation/retirement:

Name		PAN	
DOB		E-mail Id	
Gender		Mobile No.	

3. Details of Employment & Salary:

	Length of Qualifying service in number of months	
	Average of last 12 Months basic pay	
	Last month salary (Basic Pay + DA)	
	Length of qualifying service in completed six months	
	Date of start of monthly Payout	
	Admissible Payout: Assured Payout*(IC/BC) * (1-FW%) where {IC <= BC} <i>(Assured Payout = (1/2 of P) x (Q/300)) with the condition that if (P/2) XQ/300 is less than 10,000, it will be taken as 10,000, where P is basic pay and Q is qualifying service in months)</i>	

Sanction of Admissible UPS Benefits payable to Subscriber**4. UPS Benefits payable to Subscriber:**

	Date of start of top-up Payout	
	Lumpsum Payment	
	Interest on Lumpsum Payment	
	Monthly Top-up Amount	
	DR amount on admissible payout	
	Arrears on monthly top-up and applicable DR upto date of commencement of monthly top up	
	Interest on Arrears (if Applicable)	

Signature & Name of PAO	
PAO Name	PAO Registration No.
Date:	Place:

Authorising the release of benefits upon receipt of UPS payout Order after due verification

Authorised Signatory NPS Trust	
Date:	Place:

Copy to, To Subscriber
(address and email and mobile) – over email

Instructions to fill the form

1. All fields are mandatory, unless marked with Asterisks.
2. Please fill the details of the subscriber as per the service records.
3. Please give details of DDO, PAO, Department/Ministry of the office from where you retired.
4. Any one of the 5 KYC documents may be provided. In case of online filling of the form Aadhar Number or CKYC ID may be provided.
5. The current address shall be as per the KYC document provided. In case there is change in the current address, the concerned KYC documents is to be updated first.
6. The mobile number and e-mail id of the claimant shall be verified separately by sending an OTP or a link as may be applicable.
7. The field of date of joining in Central Govt regular service shall be captured from the CRA system, however, in case of any change, it shall be editable by the subscriber and duly verified by DDO.
8. In case, Aadhaar number is being given for legally wedded spouse, only the last four digits of the Aadhaar number may be provided.

List of Documents to be attached with this form**By Claimant:**

- i. Photocopy of the first page of Pass Book/Bank Statement or cancelled cheque of the Bank Account or any other bank document showing the name and account details of Account Holder, in which the payout is to be credited
- ii. Copy of PAN Card of claimant.
- iii. KYC documents of claimant
- iv. One joint photograph
- v. Specimen signature of claimant

By DDO:

- i. Copy of the document containing employment details verified by HOO
- ii. Copy of the signed Form by subscriber (in case the form submitted by subscriber in physical mode)