

FORM B5

[See Regulation 19, 20 and 23]

Claim and Payout Form

Spouse of the deceased Unified Pension Scheme (UPS) subscriber who superannuated/retired on or after 01/04/2025 and eligible for UPS benefits and subscriber had not availed benefits under UPS

Before filling the form, please read the INSTRUCTIONS carefully given at the end of the form

Photograph
of
Spouse

PART -A (to be filled by the spouse)**1. Details of deceased Subscriber:**

Name		PAN No	
Gender		Date of Superannuation/ Retirement under FR 56(j) /Retirement	
PRAN No.		Date of death (as per death certificate)	
Date of joining service			

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

Name		PAN	
DOB		Gender	

3. KYC Details:

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

4. Current Address:

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

5. Contact Details:

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

6. Details of Bank a/c of spouse for credit of UPS benefits:

Type of Bank A/c		Bank A/c No.	
Bank Name		IFSC	

7. Final withdrawal percentage – (can be availed upto 60% of corpus)

I desire to opt for Final withdrawal (applicable where subscriber had not availed UPS benefits)	% of individual corpus
I am exercising this option being fully aware that the final withdrawal will proportionately reduce the assured payout.	

Declaration:

I _____ spouse of late _____ 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 hereby 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 for calculation of UPS benefits payable to deceased subscriber:**

	Individual Corpus (IC): Value of corpus as on date of superannuation/retirement	
	Benchmark Corpus (BC) (on date of superannuation/retirement)	
	Excess/shortfall of Individual Corpus vis-a-vis Benchmark Corpus (IC-BC)	
	Final withdrawal (FW in %)	

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 (Qualifying Service as defined in Regulation 2(k) read with Regulation 13)	
	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)/ Voluntary Retirement	

	Length of Qualifying service in months (Q)	
	Length of qualifying service in completed half years (L) (fraction to be ignored)	
	Date of Start of monthly Admissible Payout (in case of Superannuation and Voluntary Retirement: <i>From next day of superannuation,</i> in case of Retirement under 56(j): <i>From next day of Retirement</i>)	
	Date of Start of family Payout to spouse (on demise of subscriber)	

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

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

Certified that the details provided by spouse of deceased subscriber in **Part-A**, details of employment, legally wedded spouse on the date of superannuation/retirement, date of death of subscriber 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 B5
(Part D)
UPS Payout Order (UPO) issued by PAO
(System Generated)**

To,

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

Photograph
of
Spouse

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

1. Details of deceased subscriber:

Name		PRAN No.		Date of death (as per death certificate)	
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2. Details of legally wedded spouse on the date of superannuation:

Name		PAN	
DOB		Gender	

3. Details of Employment & Salary:

	Length of Qualifying service in number of months	
	Average of last 12 Months basic pay	
	Assured Payout	
	Last month salary (Basic Pay + DA)	
	Length of qualifying service in completed six months	
	Date of start of monthly admissible Payout	
	Date of start of family Payout to spouse (on demise of subscriber)	

Sanction of Admissible UPS Benefits payable to Spouse

4. UPS Benefits payable to Spouse:

Lumpsum Payment	
Excess, if any, of Individual Corpus vis-a-vis Benchmark Corpus	
Final Withdrawal (if opted)	
Monthly Family Payout (60% of admissible payout) where Admissible payout=Assured Payout *IC/BC (1- Final Withdrawal%)	
DR amount on family payout	
Arrears upto date of commencement of Family Payout (including arrears of monthly payout and DR on admissible payout)	
i) Payable to subscriber till the date of demise of subscriber	
ii) Payable to Spouse after date of demise of subscriber	

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 Death certificate of deceased Government Subscriber
- iii. Copy of PAN Card of claimant.
- iv. KYC document of claimant
- v. One photograph
- vi. Specimen signature of claimant

By DDO:

- i. Copy of the document containing employment details verified by HOO
- ii. Copy of the signed Form by claimant