



Metro Railway
33/1, J. L. Nehru Road
Kolkata-700071

MRTS/E.345/0/FS/NPS/UPS

Date: 21.04.2025

ALL CONCERNED

Sub: Implementation of UPS in Metro Railway/ Kolkata.

Ref: 1. Railway Board's RBE No. 22/2025.
2. Railway Board's RBE No. 25/2025.

Unified Pension Scheme (UPS) has been introduced as an option under National Pension System (NPS) w.e.f. 01.04.2025 vide Railway Board's letter RBE No. 22/2025 along with its enclosure i.e. Gazette Notification no. FX-1/3/2024-PR dated 24.01.2025 and Railway Board's letter RBE No. 25/2025 containing Gazette Notification no. PFRDA-12/01/0001/2003-LEGAL dated 19.03.2025 issued by Pension Fund Regulatory and Development Authority (PFRDA). The option to avail benefits under UPS shall be available to the following categories:-

A. Existing Central Government employees in service as on 01.04.2025, who are covered under NPS.

All employees who wish to migrate to Unified Pension Scheme (UPS) must follow the below mentioned procedures and submit migration request latest by 30.06.2025:

1. Online: Employees can initiate migration request on their own through eNPS portal using <https://enps.nsdl.com/eNPS/UPSONlineMigration.html>
2. Offline: Employees can submit duly filled in Form A2 to Personnel Department. The forms can be downloaded from <https://www.npsra.nsdl.co.in/ups.php>

Therefore, all Controlling Officers are requested to give wide publicity of these instructions amongst all employees including subordinate offices through letters, SMS and other means of communication to ensure all concerned employees are made aware of this opportunity.

B. Central Government employees covered under NPS who have superannuated or voluntarily retired or retired under Fundamental Rules 56(j) on or before 31.03.2025.

All superannuated or retired employees who wish to migrate to Unified Pension Scheme (UPS) must follow the below mentioned procedures and submit migration request latest by 30.06.2025:


उप मुख्य कार्मिक अधिकारी
Dy. Chief Personnel Officer-
मेट्रो रेलवे, कोलकाता
Metro Railway, Kolkata

Contd. to next page

1. Online: Superannuated or retired employees can initiate migration request on their own through eNPS portal using <https://enps.nsdl.com/eNPS/UPSONlineWithdrawal.html>
2. Offline: Superannuated or retired employees can submit duly filled in Form B2 to Personnel Department. Forms can be downloaded from <https://www.npscra.nsdl.co.in/ups.php>

C. Legally wedded spouse in case of an employee who has superannuated or retired and has demised prior to exercising option of UPS.

All legally wedded spouses of superannuated or retired employees who wish to migrate to Unified Pension Scheme (UPS) must follow the below mentioned procedures and submit migration request latest by 30.06.2025:

Offline: Legally wedded spouses of superannuated or retired employees can submit duly filled in Form B4 in case deceased employee has availed benefits under UPS or Form B6 in case deceased employee has not exercised option of UPS, as applicable, to Personnel Department. Forms can be downloaded from <https://www.npscra.nsdl.co.in/ups.php>

Option to migrate to UPS must be initiated online or offline by filling up of the respective forms which are to be submitted online/ sent offline to the Personnel Department (NPS section) latest by 30.06.2025.


The options once exercised shall be final and irrevocable.


The letter along with all important enclosures as referred above and relevant forms are enclosed herewith **for wide publicity please.**

Encl.: As above.

Copy forwarded for kind information to:

1. PCME/ Metro Railway/ Kolkata.
2. APO/ Metro Railway/ Kolkata.
3. All Ch.OS, OS, CS&WI/ Metro Railway/ Kolkata


Dy. Chief Personnel Officer-II
for GM (Personnel)
Metro Railway/ Kolkata
उप मुख्य कार्मिक अधिकारी
Dy. Chief Personnel Officer-II
मेट्रो रेलवे, कोलकाता
Metro Railway, Kolkata


Dy. Chief Personnel Officer-II
for GM (Personnel)
Metro Railway/ Kolkata
उप मुख्य कार्मिक अधिकारी
Dy. Chief Personnel Officer-II
मेट्रो रेलवे, कोलकाता
Metro Railway, Kolkata

UNIFIED PENSION SCHEME (UPS) – SUBSCRIBER MIGRATION FORM - Government Sector**[See Regulation 4]****Exercise of Option by an eligible Central Government employee presently subscribed to National Pension System (NPS) For being covered under Unified Pension Scheme (UPS)****Protean eGov Technologies Limited (formerly NSDL e- Governance Infrastructure Ltd.)**

I, Son/ Daughter of Mr/Mrs. being a subscriber of NPS as on 01/04/2025 with permanent retirement account number (PRAN), having read and fully understood the provisions of Unified Pension Scheme (UPS) as notified by Central Government 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, and being eligible to opt for Unified Pension Scheme, do hereby exercise the option to be covered under Unified Pension Scheme (UPS).

Further, I hereby acknowledge that this option exercised by me shall be final and irrevocable.

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.

Signature / Thumb Impression* of Applicant

(*LTI in case of males and RTI in case of females to be provided. Toe impression in case no hands)

Place : _____

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

(To be filled and certified by the DDO based on Service records)

Employment Details (At the time of exercise of UPS option)									
Employee Code/ID									
Date of commencement of qualifying service (Qualifying Service as defined in Regulation 2(k) read with Regulation 13)	<table border="1"> <tr> <td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td> </tr> </table>	D	D	M	M	Y	Y	Y	Y
D	D	M	M	Y	Y	Y	Y		
Current Month Basic Pay									
Non-Practicing Allowance (NPA), if applicable									
Schedule date for next increment	<table border="1"> <tr> <td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td> </tr> </table>	D	D	M	M	Y	Y	Y	Y
D	D	M	M	Y	Y	Y	Y		

Signature & Name of DDO	Signature & Name of PAO
DDO Reg. No.	PAO Reg. No.
Date : _____ Place : _____	Date : _____ Place : _____

Note/Instruction:

- The duly signed copy of this Form shall be kept DDO in employee's service record and a copy of the same shall be provided to the employee for his record.
- DDO shall input the Head of Office verified data in the Central Record Keeping System and in case of physical submission of form by the subscriber, the DDO shall upload a copy of this duly signed option form. PAO shall authorise and approve the option exercised by the subscriber in the CRA system through their login.

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

Protean eGov Technologies Limited (formerly NSDL e- Governance Infrastructure Ltd.)

**Joint photograph of
Subscriber & Spouse**

**3.5 cm × 2.5 cm size /
passport size**

(Do not sign across /
staple / clip)

PART - A (to be filled by the subscriber)

1. Detail of Subscribers:

Name	<input type="text"/>																							
Employee Code / ID	<input type="text"/>																							
PRAN	<input type="text"/>										Date of Birth													
											<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>													
Date of Superannuation / Retirement under FR 56(j)	<input type="text"/>										Date of Joining Service													
											<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>													
Gender	<input type="checkbox"/> Male		<input type="checkbox"/> Female		<input type="checkbox"/> Transgender																			
PAO (<i>office name</i>)	<input type="text"/>																							
DDO (<i>office name</i>)	<input type="text"/>																							
PAN	<input type="text"/>																							
Ministry / Department (<i>from where retired</i>)	<input type="text"/>																							

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										
Country																Pin Code					

4. Contact Details:

Telephone No. (If any)	<input type="text"/>	Mobile No.	<input type="text"/>
E-Mail ID	<input type="text"/>		

5. Details of Legally Wedded Spouse as on Date of Superannuation:

Name																								
DOB	<div> <div>d</div> <div>d</div> <div>m</div> <div>m</div> <div>y</div> <div>y</div> <div>y</div> <div>y</div> </div>								PAN*															
Gender	<input type="checkbox"/> Male		<input type="checkbox"/> Female		<input type="checkbox"/> Transgender				Mobile No.															
E-Mail Id																								
Aadhaar No.*					Provide last Four Digits																			

6. Details of Bank Account:

Type of Bank A/C (As on date of superannuation)	<input type="checkbox"/> Joint with legally wedded Spouse	<input type="checkbox"/> Single (only in the absence of legally wedded Spouse)
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: _____ Name: _____

Date:

<i>d</i>	<i>d</i>	<i>m</i>	<i>m</i>	<i>y</i>	<i>y</i>	<i>y</i>	<i>y</i>
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Signature / Thumb Impression* of Applicant

(*LTI in case of males and RTI in case of females to be provided. Toe impression in case no hands)

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 (no. of units withdrawn * NAV) 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 (no. of units * NAV) as on date of superannuation
1					
2					
3					
...					
n					
Total					

3. Details for Calculation of UPS benefits payable to Subscriber:

I.	Individual Corpus (IC): Value of Corpus as on Date of Superannuation/Retirement.	
II.	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.	
III.	Final Withdrawal (FW in %).	
IV.	Representative Annuity Rate (<i>as on Date of Superannuation, as published by PFRDA</i>).	
V.	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 (*Qualifying Service as defined in Regulation 2(k) read with Regulation 13*)

d d m m y y y y

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)

d d m m y y y y

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 Payout
*(in case of superannuation, next day of superannuation or
in case of retirement under FR 56 (j), next day of retirement)*

d d m m y y y y

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 (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 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**

**3.5 cm × 2.5 cm size /
passport size**

(Do not sign across /
staple / clip)

To,

National Pension System Trust

Tower B, B-302, Third Floor, World Trade Center Nauroji Nagar, New Delhi-110029

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

☐

Male

☐

Female

☐

Transgender

PAO (office name)

DDO (office name)

PAN

Ministry / Department (from where retired)

2. Details of Legally Wedded Spouse on the Date of Superannuation / Retirement:

Name

DOB

PAN

Gender

☐

Male

☐

Female

☐

Transgender

Mobile No.

E-mail Id

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} (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

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:
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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).

Form B4

[See Regulation 19, 20 and 23]

Claim and Payout Form : Spouse of the Deceased Unified Pension Scheme (UPS) Subscriber who Superannuated/Retired on or before 31/03/2025 and eligible for UPS Benefits and Subscriber had already availed Benefits under UPS

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

Protean eGov Technologies Limited (formerly NSDL e- Governance Infrastructure Ltd.)

Photograph of Spouse

3.5 cm × 2.5 cm size / passport size

(Do not sign across / staple / clip)

PART - A (to be filled by the Spouse of Deceased Subscriber)

1. Details of Deceased Subscriber:

Name
PRAN Date of Death (as per Death Certificate)

2. Details of Legally Wedded Spouse on the Date of Superannuation:

Name
DOB PAN
Gender ☐ Male ☐ Female ☐ Transgender

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
Country Pin Code

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 ☐ Saving A/C ☐ Current A/C
Bank A/C No.
Bank Name IFSC

Declaration:

I _____ spouse of late _____ have fully read and understood the provisions of Unified Pension Scheme (UPS) as notified by Gol 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: _____ Name: _____
Date:

Signature / Thumb Impression* of Applicant

(*LTI in case of males and RTI in case of females to be provided. Toe impression in case no hands)

PART - B (Details as recorded in the CRA System)

1. Details of UPS benefits that were being paid for Deceased Subscriber :

I.	Monthly Top-Up Payout to Deceased Subscriber as on the Date of Demise	
II.	DR amount on Admissible Payout on the Date of Demise of Subscriber	

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 Start of Eligibility of Family Payout to Spouse (on demise of subscriber)

d

d

m

m

y

y

y

y

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 B4
(Part D)
UPS Payout Order (UPO) issued by PAO
(System Generated)

Photograph of
Spouse
3.5 cm × 2.5 cm
size /
passport size

(Do not sign across /
staple / clip)

To,
National Pension System Trust
Tower B, B-302, Third Floor, World Trade Center Nauroji Nagar, New Delhi-110029

File No:

UPS Payout Order (UPO) No:

Date of Issue:

d

d

m

m

y

y

y

y

1. Details of Deceased Subscriber:

Name

PRAN

Date of Death (as per Death Certificate)

d

d

m

m

y

y

y

y

2. Details of Legally Wedded Spouse on the Date of Superannuation :

Name

DOB

d

d

m

m

y

y

y

y

PAN

Gender

☐ Male

☐ Female

☐ Transgender

Sanction of Admissible UPS Benefits Payable to Spouse

3. UPS Benefits Payable to Spouse:

Date of Family Payout to Spouse (on demise of subscriber)

d

d

m

m

y

y

y

y

Monthly Family Pay-Out (60% of top-up amount payable to subscriber)

DR amount (60% of admissible payout to subscriber)

Adjustment of excess Monthly top-up Paid for Subscriber upto the Date of Commencement of Family Payout, if any

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:
-------	--------

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. 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 documents 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.

Form B6

[See Regulation 4,19 and 20]

Claim and Payout Form : Spouse of the Deceased Unified Pension Scheme (UPS) Subscriber who Superannuated/Retired on or before 31/03/2025 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

Protean eGov Technologies Limited (formerly NSDL e- Governance Infrastructure Ltd.)

Photograph of Spouse

3.5 cm × 2.5 cm size / passport size

(Do not sign across / staple / clip)

PART - A (to be filled by the Spouse of Deceased Subscriber)

1. Detail of Deceased Subscribers:

Name

PRAN

Date of Death (as per Death Certificate)

d

d

m

m

y

y

y

y

Date of Superannuation / Retirement under FR 56(j) / Retirement

d

d

m

m

y

y

y

y

Gender

☐ Male

☐ Female

☐ Transgender

Date of Joining Service

d

d

m

m

y

y

y

y

PAN

2. Details of Legally Wedded Spouse on the Date of Superannuation:

Name

DOB

d

d

m

m

y

y

y

y

PAN

Gender

☐ Male

☐ Female

☐ Transgender

3. 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 ID / Letter issued by NPR			

4. Current Address:

Flat/House No./Bldg. Name

Street / Locality

Village & Post Office / Block

City / District

State

Country

Pin Code

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

☐ Saving A/C

☐ Current A/C

Bank A/C No.

Bank Name

IFSC

Declaration:

I _____ spouse of late _____ have fully read and understood the provisions of Unified Pension Scheme (UPS) as notified by Gol 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: _____

Name: _____

Date:

d

d

m

m

y

y

y

y

Signature / Thumb Impression* of Applicant

(*LTI in case of males and RTI in case of females to be provided. Toe impression in case no hands)

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 (no. of units withdrawn * NAV) as per default pattern, as on date of superannuation (A)
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 (no. of units * NAV) as on date of superannuation
1					
2					
3					
...					
n					
Total					

3. Details for Calculation of UPS benefits payable for Deceased Subscriber:

I.	Individual Corpus (IC): Value of Corpus as on Date of Superannuation/Retirement.	
II.	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.	
III.	Final Withdrawal (FW in %).	
IV.	Representative Annuity Rate (<i>as on Date of Superannuation, as published by PFRDA</i>).	
V.	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 office record:

File No:

Employee Code / ID

Date of Commencement of Qualifying Service (*Qualifying Service as defined in Regulation 2(k) read with Regulation 13*)

d

d

m

m

y

y

y

y

Date of Superannuation/ Retirement under FR 56(j)

d

d

m

m

y

y

y

y

Length of Qualifying Service in Months (Q)

Length of Qualifying Service in Completed Half Years (L)
(fraction to be ignored)

Date of Start of Payout to Deceased Subscriber
(in case of superannuation, next day of superannuation / in case of retirement, next day of retirement)

d

d

m

m

y

y

y

y

Date of start of family Payout to Spouse *(on demise of subscriber)*

d

d

m

m

y

y

y

y

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

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			

Verified and Certified that the details are true and correct.

DDO Name	DDO Registration No.
Date:	Place:

(Do not sign across /
staple / clip)

[illegible]

Name

PRAN

Date of Death (as per Death Certificate)

Name																										
DOB	d	d	m	m	y	y	y	y	PAN																	
Gender	<input type="checkbox"/> Male	<input type="checkbox"/> Female	<input type="checkbox"/> Transgender																							

[illegible]

Date of start of Top-Up Payout	d	d	m	m	y	y	y	y												
Lumpsum Payment																				
Interest on Lumpsum Payment																				
Monthly Family Pay-Out (60% of topup amount apyable to subscriber)																				
DR Amount (on 60% of admissible payout)																				
Arrears upto Date of Commencement of Family Payout (including arrears of monthly top up payout and DR on admissible payout)																				
Top-Up Amount payable to Subscriber till the Date of demise of Subscriber																				
Family Payout payable to Spouse after Date of demise of Subscriber																				
Interest on Arrears for Top-Up and applicable DR (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:
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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 documents 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.