

SYNDICATE BANK PENSIONERS & RETIREES ASSOCIATION (REGD.)

(Affiliated to AIBPARC)

CENTRAL OFFICE

203, Glendale Residency, King Koti Road, Abids, Hyderabad – 500001

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Cir No. 2/2021

(Please circulate to all members/retirees)

Date: 14/01/2021

Dear Comrades,

STAFF WELFARE SCHEMES IN THE BANK

Bank has finalised the details of Staff Welfare Schemes for the year ending March 2021 and issued guidelines for submission of claims vide HO:HRW:IRS Memo No. 3/2021 dated 13.1.2021 text of which is attached herewith for information of all.

1. As per Clause No. 10, 10A and 11 of the cited Memo: Reimbursement of either Medical expense incurred or Premium paid towards Health insurance Policy up to an amount of Rs3000/- to the Retired Staff and Rs1000/- to the Family Pensioners is permitted.
2. Pre-1986 retirees or spouses of such deceased retirees will be paid Rs.3000/- per month respectively under Staff Welfare Scheme. The amount will be paid every month along with the ex-gratia amount without the beneficiary claiming the same.
3. Last date for submission of claim for Medical Aid or reimbursement of insurance premium is 25.3.2021.
4. Claims are to be submitted in proforma given in Annexure 5 or 5A to the respective Circle Offices. Claims can be made online also. (List of Circle Offices with Phone Nos. & eMail Ids is attached herewith)
5. Annexures for submission of claims are furnished in the bank's Memo.

With greetings

Yours comradely,

C Gangadhar Yadav

GENERAL SECRETARY

SBPRA - ZINDABAD
AIBPARC - ZINDABAD
CBPRO - ZINDABAD

SUB: STAFF WELFARE MEASURES - 2020-21

:SYNOPSIS:

1. The claims of Serving Employees' related Schemes i.e. Scheme No.1,2,4,6A,6B,6C & 7 shall invariably be submitted by the employees through HRMS Package- ESS Page and approved by the Competent Authority in HRMS Package.
2. The reimbursement under Scheme No.4 is restricted only towards total medical checkup as per the scheme.
3. For Scheme No.1 Branch/Section/Office in charge shall be the Competent Authority for permitting reimbursement. As such once the claim is approved in the HRMS Package the eligible amount can be reimbursed by way of credit to the account of employee by debiting the amount to General Charges - Staff Welfare Schemes Expenses by Straight Through Process (STP)
4. For Scheme No.2, 3, 4, 5, 6A, 6B, 6C, 7, 8, 9,10 & 10A HRM Section of concerned Circle Office, shall be the Competent Authority for permitting the reimbursement. As such once the claim is approved in the HRMS Package or otherwise as the case may be, the eligible amount will be reimbursed directly to employees/ex-employees accounts by the HRM Section of concerned Circle Office.
5. The last date for submission of claims under Scheme No.2 is 12.03.2021 & Schemes No.1, 4, 6A, 6B, 6C, 7, 9,10 & 10A is 25.03.2021.
6. Employees who are under suspension are not eligible for the benefit of these schemes during the period of suspension.
7. Once last date for submission of claim is over, the branches have to submit the statement as per Annexure-6 within next three working days to concerned HRM Section. The total of expenditure mentioned in the statement shall tally with expenditure shown under respective Head in the CBS system.
8. Circle Office shall submit the statement as per Annexure-7 to I R Section, HR Wing, Head Office, Bengaluru. The total of expenditure mentioned in the statement shall tally with expenditure shown under respective Head in the CBS system.

We are pleased to inform that the Competent Authority has permitted to continue the following schemes under Staff Welfare Measures for the year 2020-21. This is in supersession of all our earlier Memos issued on the subject matter.

1. REIMBURSEMENT OF EDUCATIONAL EXPENSES:

The Scheme is intended to reimburse educational expenses incurred by the employee for educating his/her child for pursuing higher studies in India / abroad.

A. ELIGIBILITY:

THE NUMBER OF CLAIM AND REIMBURSEMENT IS RESTRICTED TO ONE CLAIM PER EMPLOYEE

B. QUANTUM OF REIMBURSEMENT:

- i) The limits for reimbursement of Educational Expenses are as under:

| | |
|-----------------------|----------|
| 1. Up to X Std. | Rs. 2400 |
| 2. XI Std. and above. | Rs. 2750 |

The above amount is reimbursable for one child only according to the category.

Subject to conditions mentioned above, Employees having a child with disabilities (visually challenged, hearing impaired orthopedically challenged with not less than 40% of the disability as the case may be) pursuing higher studies (XI standard and above including vocational training) are eligible for double the quantum of the amount fixed subject to production of proof.

C. OTHER CONDITIONS:

- i) The Scheme is applicable to the eligible employees whose child is studying during the academic year 2020-21 only.
- ii) The employee shall submit the claim through HRMS Package - ESS Page. The employee has to submit to the branch/office a proof of study in the relevant academic course/ year for claiming reimbursement. The Sanctioning Authority shall note that only after approving the claim in HRMS package, reimbursement shall be permitted debiting the Head - General Charges - Staff Welfare Measure Expenses.
- iii) The last date for submission of claims is **25.03.2021**.
- iv) It is reported that in some of the branches, reimbursement of educational expenses is considered only to the extent of amount mentioned in the proof / fees receipt produced by the employee. Please note that the fees receipt / certificate is obtained as a proof of study as to the relevant academic course pursued and reimbursement shall be permitted to the extent of limit specified above.
- v) Reimbursement is also permissible if the child is studying through correspondence course conducted by approved Universities/Board.
- vi) In case, an employee is under suspension, he/she is not eligible for the benefit during the period of suspension.
- vii) Reimbursement is not permissible if the child is studying through tutorial college/vocational course/ICWA.
- viii) The employee whose child pursuing Chartered Accountancy course (CA) shall be eligible for reimbursement of expenses as applicable to the category "XI Standard & above".
- ix) If both husband and wife are employees of our Bank and are having 2 children, both can claim reimbursement for one child each in their individual capacity as per their eligibility (But, both cannot claim for the same child). If both husband and wife are employees of our Bank and are having only one child, any of the employee can claim reimbursement for the child under the scheme.

2. AWARD TO CHILDREN OF SUBORDINATE STAFF EMPLOYEES:

The Scheme is intended to reward the meritorious children of Subordinate staff (not dependant relatives) who have passed Matriculation / HSC / ISC in First Class during the academic year 2019-20.

A. ELIGIBILITY:

All Subordinate staff employees (including HKPs & PTEs in time scale) whose child has passed Matriculation / HSC / ISC in First Class in the year 2020 (Academic year 2019-20) are eligible to apply under this scheme.

B. AMOUNT OF FINANCIAL ASSISTANCE:

A sum of Rs.4,000/- will be released to the Subordinate staff employee as an Award.

C. NUMBER OF AWARDS:

The total number of Awards under the Scheme shall be 180. The number of awards in each Circle shall be communicated to Circles separately, duly taking into account the strength of subordinate staff (including HKPs & PTEs in time scale) in each Circle.

D. OTHER TERMS AND CONDITIONS:

- i) The selection will be made purely on the basis of marks obtained in the relevant academic year.
- ii) The benefit under this Scheme is available to only one child of the employee.
- iii) Eligible Subordinate staff employees (including HKPs & PTEs in time scale) whose child is eligible under the Scheme may apply through HRMS Package - ESS Page and forward a proof of marks card/certificate on or before **12.03.2021**.
- iv) Concerned HRM Section / HOSA Section / Staff Administration Section at Inspection Wing will process the claim applied through HRMS Package and rank them in the order of merit, i.e. as per the marks obtained in the eligible examination. Thereafter, based on the ranking list, financial assistance will be awarded to the extent of Rs.4,000/- to the eligible subordinate staff employee by **25.03.2021** by HRM Section /HOSA Section / Staff Administration Section by debiting amount to General Charges - **Staff Welfare Schemes Expenses**. The decision of the HRM Section /HOSA Section / Staff Administration Section in deciding the rank shall be final.

3. DEATH RELIEF SCHEME:

- i) The Scheme is intended to provide relief to the family members of the deceased permanent employee.
- ii) Under the Scheme, a sum of **Rs.1,50,000/-** (in case of permanent employees) will be given to the nominee of the SPF/DCPS and in the absence of nomination in SPF/DCPS to the nominee of Gratuity. If there is no nomination in SPF/DCPS or in Gratuity the amount will be settled to the Legal heirs.
- iii) The amount will be disbursed in the event of death of an employee in service. The deaths occurred while intercepting dacoity, etc. for which special scheme has been provided by the Bank is not eligible under the scheme. However, the death occurred due to accident for which GPAI cover is available will also be covered under this scheme.
- iv) To claim the amount, the nominee of the SPF/DCPS/Gratuity/Legal heir/s as the case may be has to submit an application to the Branch/Office where the employee was working at the time of his / her death, as per **Annexure-1**. The Branch/Office has to forward the application to the concerned HRM Section of Circle Office. A copy of the same may be sent to SPF & G Section, Head Office to enable them to advice the name of the nominee to the concerned HRM Section.

Wherever, nomination has not been registered for SPF/DCPS, the amount will be settled to nominee of Gratuity. If no nomination either in SPF/DCPS or in Gratuity the amount will be disbursed to legal heirs. The identification of legal heirs needs to be done as per the guidelines of MOI on Settlement of Death Claim in consultation with the concerned Legal Section at Circle Office.

- v) The Scheme will be in force from 01.04.2020 till the implementation of proposed Group Term Insurance Policy or upto 31.03.2021 whichever is earlier. Claims with regard to employees who were in service on 01.04.2020 and expired subsequently before issuance of this Memo are also included under the Scheme.
- vi) A stamped receipt from the nominee of the SPF/DCPS/Gratuity/Legal heirs (as per **Annexure 1A**) should be obtained at the time of disbursement and a copy of the same is to be forwarded to HRM Section, Circle Office. The original receipt along with the application obtained from the nominee of the SPF/DCPS/Gratuity/Legal heirs should be filed separately by branches and the same shall be made available to the inspectors at the time of inspection of the branch / office.
- vii) Disbursement shall be made by way of DD/ Credit of SB Account only to the nominee of the SPF/DCPS/Gratuity/ Legal heirs after receipt by the HRM Section of the Concerned Circle Office.

4. REIMBURSEMENT OF EXPENSES TOWARDS MEDICAL CHECK UP FOR SELF/ SELF AND SPOUSE:

- (i) All the employees above 40 years of age are covered under the scheme. The employees have to necessarily undergo total medical checkup as per the scheme to claim the reimbursement under the scheme.
- (ii) The reimbursement is permissible for self/self & spouse.
- (iii) **If the claim is for self alone, reimbursement shall be the actual expenses or Rs.1500/- whichever is lower and if the claim is for self and spouse reimbursement shall be restricted to the actual expenses or Rs.2000/- whichever is lower.**
- (iv) Reimbursement for spouse alone is not permissible. An employee has to necessarily undergo medical checkup as per scheme to be eligible to claim reimbursement for spouse also.
- (v) The reimbursement under the scheme is admissible for the expenses incurred during the financial year 2020-21.
- (vi) Reimbursement will be permitted only once during the year i.e. during period of this Scheme.
- (vii) An employee claiming for reimbursement has to submit the bills and a certificate from the doctor stating that the employee/spouse has/have undergone total medical checkup.
- (viii) Normally, a person undergoing total medical check up, is required to undergo the following tests:

- | | |
|---|--------------------------|
| 1. Hematology profile | 16. Potassium |
| 2. ESR | 17. Chlorides |
| 3. Urine Routine | 18. Bicarbonate |
| 4. Glucose F & PP | 19. Acid Phosphatase |
| 5. Urea Nitrogen (BUN) or Blood Urea test | 20. Alkaline Phosphatase |
| 6. Creatinine | 21. SGOT |
| | 22. SGPT |
| 7. Cholesterol | 23. LDH |
| 8. HDL - Cholesterol | 24. GGTP (Gamma GT) |
| 9. Triglycerides | 25. Uric Acid |
| 10. ECG | 26. Proteins |
| 11. Stool Routine | 27. Albumin |
| 12. X-Ray Chest | 28. Bilirubin Total |

- | | |
|----------------|--|
| 13. Calcium | 29. Bilirubin Direct |
| 14. Phosphorus | 30. Treadmill Test (also known as TMT) |
| 15. Sodium | 31. Pap Smear Test (for Women) |
| | 32. Mammogram Test (for Women) |

Any employee claiming reimbursement has to undergo at least a minimum of first 12 tests amongst various tests mentioned above. However, the above stipulation that an employee has to undergo minimum first 12 tests is applicable only for the medical check up done for the first time. From second time onwards, Test No.11 & 12 i.e., Stool Routine and X-Ray Chest is made optional. Employees have to necessarily submit original bills/vouchers and a certificate from the doctor stating that the employee has undergone total medical check up.

- (ix) Individual tests are not eligible for reimbursement as the reimbursement is meant for total medical check up.
- (x) Employees are not eligible for any special leave/Travelling Allowance for undergoing these tests and they have to avail appropriate category of leave, if necessary.
- (xi) No separate reimbursement towards bed charges will be permitted and such charges are also to be covered under the maximum limit fixed.
- (xii) The eligible employee shall submit the claim through HRMS Package - ESS Page and forward original bill/ receipt in support of the claim to the HRM Section of the concerned Circle Office. The HRM Section, which is the Sanctioning Authority under the Scheme, process and approves the bill in HRMS package and debit General Charges - **Staff Welfare Schemes Expenses** and disburse the same to the employee.
- (xiii) The last date for submission of claims is **25.03.2021**.

5 FINANCIAL ASSISTANCE TO EMPLOYEES WHO ARE ON LOSS OF PAY ON ACCOUNT OF HOSPITALISATION:

The Scheme is intended to provide financial assistance of **Rs.6,000/- per month or the actual amount of loss of pay for the month whichever is lower** to the employee who avails leave on loss of pay on account of his/her illness/convalescence for a **maximum period of 6 months**.

- i) The employee to become eligible under this Scheme should have been hospitalised for major/special operation/ ailments which are mentioned as 'Critical Illness' in terms of the provisions of the Bipartite Settlement/Joint Note dated 25.05.2015 and had to remain on loss of pay owing to treatment of such critical illness.
- ii) A sum of Rs.6,000/- per month or the actual amount of loss of pay whichever is lower will be disbursed to the employee to compensate his leave on loss of pay on account of hospitalization / convalescence subject to a maximum of 6 months.
- iii) Employees may send their application for this purpose to the concerned HRM Section as per **Annexure-2**. The Circle Office has to examine the application submitted by the employee and disburse the amount, in case the employee is eligible by debiting General Charges - **Staff Welfare Schemes Expenses**.
- iv) Further, the benefit under the scheme is also available to the employees who avail leave on loss of pay on medical grounds for certain major ailments undergoing domiciliary treatment without hospitalisation, viz., cardiac ailments, cancer, TB, paralysis, kidney ailments, tumour and pleurisy. Such of those employees eligible under this relaxation may make an application to the concerned HRM Section as per **Annexure 2**.

6. RELIEF TO PHYSICALLY HANDICAPPED, VISUALLY IMPAIRED & DEAF EMPLOYEES FOR PURCHASE OF CRUTCHES AND OTHER ACCESSORIES/SPECTACLES/HEARING AID:

A PHYSICALLY HANDICAPPED EMPLOYEES:

- i. The benefit under the scheme is available only to physically handicapped employees who are in receipt of conveyance allowance as per Government guidelines.
- ii. **The employees covered above are eligible for reimbursement of crutches and other accessories and wheel chair purchased subject to a maximum of Rs.6,000/-.**
- iii. Reimbursement of cost for purchase of crutches and other accessories shall be once in a year.
- iv. The benefit under the scheme will be available only for the expenses incurred during the year i.e. on or after **01.04.2020**.
- v. The eligible physically handicapped employees may submit their claim through HRMS Package - Employees Self Service page to HRM Sections concerned enclosing the proof of expenditure. The last date for submission of claims is **25.03.2021**.

B REIMBURSEMENT OF EXPENSES INCURRED TOWARDS PURCHASE OF HEARING AID:

The benefit under this Scheme is available to employees who have hearing impairment and are in receipt of Conveyance allowance as per Government Guidelines.

- i) **The employees covered under this scheme are eligible for reimbursement of expenses incurred for purchase of Hearing Aid subject to a maximum of Rs.10000/-.**
- ii) Reimbursement of cost of hearing aid shall be once in three years i.e. there shall be a gap of three years between two claims under this head for an employee.
- iii) The reimbursement shall be considered to the employees based on Doctor's advice/certificate and submission of bills towards procurement of the hearing aid.
- iv) The benefit under the scheme is available only for the expenses incurred on or after **01.04.2020**.
- v) The claim should be preferred on or before **25.03.2021**.
- vi) The employees have to submit their claim through HRMS Package - Employees Self Service page to HRM Section for reimbursement of expenses incurred by submitting necessary proof.

C REIMBURSEMENT OF EXPENSES INCURRED TOWARDS PURCHASE OF SPECTACLES FOR VISUALLY IMPAIRED:

The benefit under this Scheme is available towards reimbursement of cost of spectacles to visually impaired employees who are in receipt of conveyance allowance as per Government guidelines.

- i) **The employees covered under this scheme are eligible for reimbursement of expenses incurred for purchase of spectacles subject to a maximum of Rs.3000/-.**
- ii) Reimbursement of cost of spectacles shall be once in a year.

- iii) The reimbursement shall be considered to the employees based on Doctor's advice/certificate and submission of bills towards procurement of the spectacles.
- iv) The benefit under the scheme is available only for the expenses incurred on or after **01.04.2020**.
- v) The claim should be preferred on or before **25.03.2021**.
- vi) The employees have to submit their claim through HRMS Package - Employees Self Service page to HRM Section for reimbursement of expenses incurred with necessary proof.

Under scheme No.6 [A], [B] & [C] the “physically handicapped” “hearing impaired” & “visually impaired” category employees shall be permitted to purchase any of such gadgets specially designed, invented, created to overcome the disability, within the ceiling permitted above, besides the articles already specified above.

The HRM Section will be the sanctioning authority for the reimbursement under the above schemes. If the claims are found eligible, same needs to be sanctioned in the HRMS Package by the HRM Section and disburse (by HRM Section directly) the same to the employee by debiting General Charges - **Staff Welfare Schemes Expenses**.

7 INCENTIVE FOR PROMOTION OF SMALL FAMILY NORMS:

At present, as per Government of India instructions, Bank is paying a sum of Rs.500/- as cash incentive to the employee if he/she or his/her spouse undergo family planning operation by debiting General Charges. To encourage adoption of small family norms, it has been decided to give an **additional cash incentive of Rs.1000/-** to such of those employees who/whose spouse undergo operation for the period from **01.04.2020 to 25.03.2021** under Staff Welfare Measures.

The eligible employee has to submit the claim through HRMS Package - Employees Self Service page and necessary proof needs to be submitted to HRM Section. This amount will be sanctioned by HRM Section of Circle Office and will be disbursed by them to the account of concerned employee by debiting General Charges - **Staff Welfare Schemes Expenses**.

8. FUNERAL EXPENSES:

Bank has introduced a new scheme for payment of **funeral expenses of Rs.20,000/-** in case of sad demise of an employee, while in service.

- i) The Scheme is intended to provide immediate relief to the family members of the deceased employee.
- ii) The scheme is meant for all permanent employees.
- iii) Under the Scheme, a sum of Rs.20,000/- (in case of permanent employees) will be given to the nominee of the SPF/DCPS and in the absence of nomination in SPF/DCPS to the nominee of Gratuity. If there is no nomination in SPF/DCPS or in Gratuity the amount to be paid to immediate Legal heirs.
- iv) The amount will be disbursed in the event of death of an employee while in service.
- v) The Branch/Office may contact SPF&G Section, Head Office to enable them to advice the name of the nominee to the concerned Branch.
- vi) The Branch Manager/ Office in-charge is authorized to debit General Charges Staff Welfare Measure Scheme expenses and pay nominee of the SPF/DCPS/Gratuity/Legal heirs under acknowledgement and forward the receipt/acknowledgment of the receipt of amount by the concerned to HRM Section, Circle Office. The original receipt

obtained from the nominee of the SPF/DCPS/Gratuity/Legal heirs should be filed separately by Circle Office and the same shall be made available to the inspectors at the time of inspection of the branch / office. The format for obtaining receipt is enclosed as **Annexure-3**.

9. FREE EDUCATION BENEFIT TO THE CHILDREN OF DECEASED EMPLOYEE:

Bank has introduced a scheme for Free Education Benefit Scheme to the children of deceased employees. The details of the scheme is as under:

- i) This scheme is applicable to children of employee who died while in service.
- ii) Only First two children are eligible for the free education benefit.
- iii) Tuition Fees or cost of Books at Rs.200/- per month per child is payable for education up to 12th standard.
- iv) Rs.3000/- per academic year for graduation { UGC recognized Courses}
- v) 50% of Tuition Fees or Rs.12,500/- per academic year whichever is less for engineering course { Maximum Rs.50,000/- for the entire course}
- vi) 25% of the Tuition Fees or Rs. 20,000/- per academic year whichever is less for Medical Course { Maximum Rs.80,000/- for the entire Course}
- vii) The claim format is enclosed as **Annexure-4**.
- viii) The claim is to be submitted to pension paying branch where the spouse is maintaining family pension account. The pension paying branch shall collect the application form in the prescribed format along with the attested copy of the receipts duly verifying the originals and forward the same to the concerned HRM Section of the Circle. Circle Office shall credit the family pension account by debiting General Charges Staff Welfare Scheme Expenses.
- ix) Where the spouse is not a family pensioner or where the spouse is also not alive, the claim should be preferred to the HRM Section of the Circle Office within whose jurisdiction the employee last worked. Circle Office shall verify the claim and credit the account specified by the claimant debiting General Charges Staff Welfare Scheme Expenses.
- x) All claims under this category should be submitted on or before 25.03.2021 and the re-imburement should be made on or before 31.03.2021.

10. REIMBURSEMENT OF EITHER MEDICAL EXPENSES OR EXPENSES INCURRED TOWARDS PAYMENT OF PREMIUM TOWARDS MEDICLAIM POLICY INCURRED BY RETIRED EMPLOYEES:

- i) All the retired employees who have retired from the services of the Bank on or before **31.03.2020** on superannuation/VRS/SVRS 2001 shall be eligible for the benefit under the scheme.
- ii) The following persons are not eligible under the Scheme:
 - a. Employees who have been discharged / dismissed/ removed from the service / compulsorily retired/ terminated on the grounds of misconduct.
 - b. Employees who have resigned from the services of the Bank.
- iii) The eligible employees will be reimbursed either towards medical expenses incurred by them for the year 2020-21 on declaration basis or towards the purchase / renewal of any Mediclaim Policy of their choice including IBA Medical Insurance policy.
- iv) **The reimbursement under this head is subject to maximum of Rs. 3000/-.**
- v) The expenses for which reimbursement is claimed under this head should have been incurred during the year 2020-21.
- vi) The reimbursement of such medical expenses under this head shall be made on declaration basis as per **Annexure 5** and in case reimbursement is claimed for

expenses incurred towards premium of Medclaim policy, the eligible retired employee shall produce a copy of premium paid receipt. In case such retired employee has opted for IBA Medical Insurance issued by M/s National Insurance Company Limited, a declaration to this effect may be submitted.

- vii) **The eligible ex employees who are drawing pension from our Bank have to submit their declaration/ copy of premium paid receipt along with claim to the concerned Circle Office to which their Pension Paying Branch is assigned, duly informing the details such as Pension Account Number to which the amount is to be credited. The claim should be preferred on or before 25.03.2021. The Circle Office shall process the claim and disburse the same to the ex employee by way of credit to their Pension Account specified by debiting General Charges - Staff Welfare Schemes Expenses before 31.03.2021.**
- viii) Those eligible ex-employees who are not pensioners shall claim the reimbursement amount through HRM Section of Circle Office from which they had retired. Such claims shall be processed and if found in order, reimbursement shall be made to the account specified by such ex employee by debiting General Charges-Staff Welfare Expenses before 31.03.2021. The said claim is also to be preferred on or before 25.03.2021.

10A REIMBURSEMENT OF MEDICAL EXPENSES ON DECLARATION BASIS TO SPOUSES OF DECEASED EMPLOYEES WHO ARE DRAWING FAMILY PENSION:

- i) The spouse of such employees / retired employee who had died on or before 31.03.2020 and drawing family pension from our Bank are eligible under this scheme.
- ii) The reimbursement under this head is subject to **maximum of Rs.1,000/-**.
- iii) The reimbursement of such medical expenses under this head shall be made on declaration basis as per **Annexure 5A** and in case reimbursement is claimed for expenses incurred towards premium of Medclaim policy the eligible spouse of retiree shall produce a copy of premium paid receipt. In case such spouse of retiree has opted for IBA Medical Insurance issued by M/s National Insurance Company Ltd a declaration to this effect may be submitted.
- iv) The expenses for which reimbursement is claimed under this head should have been incurred for the year 2020-21.
- v) The eligible spouses of deceased employees have to submit their declaration/ claim to the concerned Circle Office to which their Pension Paying Branch is assigned, duly informing the details such as Pension Account Number to which the amount is to be credited. The claim should be preferred on or before 25.03.2021. The Circle Office shall process the claim and disburse the same to the spouse of ex employee who is drawing family pension by way of credit to their Pension Account specified by debit General Charges - Staff Welfare Schemes Expenses before 31.03.2021.
- vi) The above scheme is not available to such of those spouses who are drawing family pension being a widow or widower of a deceased employee/ deceased retired employee of our Bank but are claiming benefit under any of the scheme mentioned in Sl.No.4 of this memo.

11. SPECIAL SCHEME FOR PRE-1986 RETIREES OR SPOUSE OF SUCH DECEASED RETIREES WHO ARE PAID EX-GRATIA AMOUNT BY THE BANK.

All surviving Pre-1986 retirees or spouses of such deceased retirees, who are being paid ex-gratia amount from our Bank every month, will be paid **Rs.3,000/- per month** respectively under Staff Welfare Measures for the year 2020-21. The amount will be paid every month along with the ex-gratia amount through Employees' Pension Fund, without the beneficiary claiming the same as done hitherto.

General Guidelines:

The reimbursement under Scheme Nos. 1,2,4,6A,6B,6C & 7 has to be claimed by submitting request through HRMS Package ESS Page and for Scheme Nos. 3, 5, 8, 9,10 & 10A by submitting relevant Annexures. The reimbursement made by Branches / Offices in respect of claims under all the above Schemes shall be debited to General Charges - Staff Welfare Scheme Expenses. Branches / Offices shall use strictly the code only. Branches shall contact concerned HRM Section for further information, if any.

Branches / Offices have to keep proper records / vouchers in respect of reimbursements permitted under the Schemes and the same shall be made available to the Inspecting Officers for verification during the Regular Inspection.

Claims received after the dates mentioned under each Scheme shall not be entertained.

However, in case employees who are under suspension, they are not eligible for the benefit of these schemes during the period of suspension.

For scheme No.1,2,4,6A,6B,6C & 7 under no circumstances, the same shall be payable to employees without the same is being submitted & approved in the HRMS Package.

Once last date for submission of claim is over, the branches/offices have to submit the statement as per Annexure-6.

Circle Office shall submit the statement as per Annexure-7.

Such of those employees who are on the rolls of the Bank as on 01.04.2020 and superannuated/voluntarily retired subsequently, are eligible to claim the reimbursement of expenses under Staff Welfare Measures 2020-21 for eligible schemes by submitting the claim in writing. Since those employees superannuated/ voluntarily retired on or after 01.04.2020 do not have access to HRMS package, such eligible ex-employees shall submit their claim manually as per the format enclosed as an Annexure 8,9 & 10 to this Memo.

All the above schemes will be in force from 01.04.2020 - to 31.03.2021.

This may be circulated amongst all the employees of the Bank.

**L V R PRASAD
CHIEF GENERAL MANAGER**

TO: ALL BRANCHES / OFFICES OF THE BANK

ANNEXURE 1**CANARA BANK
HEAD OFFICE: BENGALURU****APPLICATION FOR RELEASE OF DEATH RELIEF AMOUNT TO THE NOMINEE OF
SPF / DCPS/LEGAL HEIR/s [Scheme 3]**

1. Name of the deceased employee ::
2. Staff Number ::
3. Branch/ Office where he / she last worked ::
4. Name of the Applicant ::
(Nominee of SPF/DCPS/Gratuity/Legal Heir)
5. Full Address for correspondence ::
6. Relationship of the applicant to the deceased employee ::
7. Date of Death (enclose proof) ::
8. Reference (please furnish 2 references known to the Bank) ::

I/ We hereby declare that the above information furnished is true and correct. I/ We request you to disburse me a sum of Rs.1,50,000/- as per the Bank's scheme (Memo No.3/2021 dated 13.01.2021) at an early date.

Place :

Date :

SIGNATURE OF THE APPLICANT

ANNEXURE 1-A

**CANARA BANK
HEAD OFFICE : BENGALURU**

RECEIPT

I,S/O/D/O/W/O..... being the nominee to SPF/ nominee to DCPS/Gratuity/legal heir/s of Late Sri/Smt residing at hereby acknowledge that I have received from Canara Bank Rs.1,50,000/- (Rupees One lakh fifty thousand Only) by way of DD No. dated..... drawn on..... Branch / SB A/c No.....towards Death Relief on account of death of Sri/Smt.....employee of Canara Bank.Branch/Office while in service.

DATE :

PLACE :

SIGNATURE

(To be obtained by branch and copy to be forwarded to HRM Section, Circle Office)

ANNEXURE - 2

CANARA BANK
HEAD OFFICE: BENGALURU

FROM:

To:

.....
Canara BankThe Senior Manager/Manager
Canara Bank
HRM Section
Circle Office

.....

.....

.....

APPLICATION FOR FINANCIAL ASSISTANCE FOR LEAVE ON LOSS OF PAY ON
ACCOUNT OF ILLNESS

1. Name of the Employee and Staff No ::
2. Present place of working ::
3. Period of Loss of Pay ::
4. Leave Proceedings Nos. and Date ::
5. Nature of illness and details of medical ::
bill sanctioned
6. Amount of Financial Assistance ::
claimed

I hereby declare that the above information is true and correct. Please disburse me the amount as per Memo No.3/2021 dated 13.01.2021.

Place :

Date :

SIGNATURE OF THE EMPLOYEE

ANNEXURE 3

**CANARA BANK
HEAD OFFICE : BENGALURU**

RECEIPT

I,S/O/D/O/W/O..... being the nominee to SPF/ nominee to DCPS/Gratuity/legal heir/s of Late Sri/Smt residing at hereby acknowledge that I have received from Canara Bank Rs.20,000/- (Rupees Twenty thousand Only) cash towards Funeral expenses on account of death of Sri/Smt.....employee of Canara Bank.Branch/Office while in service.

DATE :

PLACE :

S I G N A T U R E

(To be obtained by branch and copy to be forwarded to HRM Section, Circle Office)

ANNEXURE 4**CANARA BANK
HEAD OFFICE: BENGALURU****APPLICATION FOR RELEASE OF FREE EDUCATION BENEFIT TO CHILDREN OF DECEASED
EMPLOYEE WHILE IN SERVICE**

1. Name of the deceased employee ::
2. Staff Number ::
3. Branch/ Office where he / she last worked ::
4. Name of the child:
Date of Birth:
5. Name of the guardian [If the child is minor]
5. Date of Death (enclose proof)
5. Relation [Son/daughter]
5. Study /Course pursued [enclose proof of course of study] ::
5. Amount claimed ::
- 6 Amount already claimed [In case of Engineering or Medical course]
6. Full Address for correspondence ::
Mobile No.
Email ID
7. Account No. & IFSC Code * ::
8. Name of the Branch ::

I/ We hereby declare that the above information furnished is true and correct. I/ We request you to disburse me a sum of Rs._____/ - as per the Bank's scheme (Memo No.3/2021 dated 13.01.2021) at an early date.

Place :

Date :

SIGNATURE OF THE APPLICANT/GUARDIAN

**ANNEXURE - 5
CANARA BANK
HEAD OFFICE : BENGALURU**

APPLICATION FORM FOR CLAIMING MEDICAL EXPENSES BY RETIRED EMPLOYEES.

FROM: (Present Address)

TO:

Name & Staff No.....

The Senior Manager/Manager

Desgn.....

Canara Bank

HRM Section

.....

.....

Mobile No.: -----

Sir,

I have incurred a sum of Rs..... (Rupees.....only) towards cost of medical checkup, medicines/ Premium towards Mediclaim Policy/ IBA Medical Insurance Policy. I confirm that I am drawing pension from Branch which falls under your Circle Office.

Date of joining the Bank

::

Mode of exit

::

Date of Cessation

::

Date of birth & age as on 01.04.2020

::

Name of the Branch/Office where last worked

::

In case, it is reimbursement claime Towards premium of Mediclaim Policy, following details be furnished ::

Mediclaim Policy/IBA Medical Insurance Policy Premium paid details [Ensure that the Policy is taken and renewed after 01.04.2020]. ::

Copy of the Premium Paid Receipt / Mediclaim Policy ::

I request you to sanction me a sum of Rs.3000/- and credit the same to the below mentioned account in terms of Memo No.3/2021 dated 13.01.2021.

ACCOUNT : SB/OD No.

IFSC Code :

BRANCH :

DP CODE NO. :

I am Pensioner/Non-pensioner (Tick whichever is applicable).

(If Pensioner, also inform the Pension Account Number and the name of the Branch through which the pension is drawn).

Yours faithfully,

DATE :

SIGNATURE

ANNEXURE - 5 A

CANARA BANK
HEAD OFFICE: BENGALURUAPPLICATION FORM FOR CLAIMING MEDICAL EXPENSES BY ELIGIBLE SPOUSES OF DECEASED
EMPLOYEES.

FROM: (Present Address)

TO:

Name.....

The Senior Manager/Manager

Address.....

Canara Bank

HRM Section/ Pension Paying Branch

.....

.....

Mobile No. : -----

Sir,

I have incurred a sum of Rs..... (Rupees.....only) towards cost of medical checkup, medicines / purchase of Mediclaim Policy/ IBA Mediclaim Insurance on or after 01.04.2020.

Name of the Employee with staff No ::

PPO No. and Date ::

Date of death of spouse ::

In case, it is reimbursement claimed ::
Towards premium of Mediclaim Policy,
following details be furnished

Name of the Branch/Office where Family ::
Pension being paid

I request you to sanction me a sum of Rs.1000/- and credit the same to the below mentioned account in terms of Memo No.3/2021 dated 13.01.2021

PENSION ACCOUNT NO. : SB/OD No.

IFSC Code:

BRANCH :

DP CODE NO:

Yours faithfully,

DATE :

SIGNATURE

ANNEXURE 6

| From _____Branch/ Office Circle Office _____ | | To Senior Manager/ Manager HRM Section Circle Office, _____ | |
|--|--|---|-------------------------|
| Sl. No. | PARTICULARS | NO. OF CLAIMS | AMOUNT SANCTIONED (Rs.) |
| 1 | REIMBURSEMENT OF EDUCATIONAL EXPENSES: | | |
| | a) UPTO X STD. | | |
| | b) XI STD. & ABOVE | | |
| 2 | FUNERAL EXPENSES | | |
| | TOTAL | | |

MANAGER/SENIOR MANAGER

ANNEXURE 7

| From The Asst. General Manager HRM Section Circle Office _____ | | To The Asst. General Manager I R Section, H R Wing Head Office Bengaluru | |
|---|---|--|-------------------------|
| Sl. No. | PARTICULARS | NO. OF CLAIMS | AMOUNT SANCTIONED (Rs.) |
| 1 | REIMBURSEMENT OF EDUCATIONAL EXPENSES: | | |
| | a) UPTO X STD. | | |
| | b) XI STD. & ABOVE | | |
| 2 | AWARD TO CHILDREN OF SUB-STAFF EMPLOYEES | | |
| 3 | DEATH RELIEF SCHEME | | |
| 4 | REIMBURSEMENT OF EXPENSES TOWARDS MEDICAL CHECK UP | | |
| 5 | FINANCIAL ASSISTANCE TO EMPLOYEES WHO ARE ON LOSS OF PAY | | |
| 6 | RELIEF TO PHYSICALLY HANDICAPPED / VISUALLY IMPAIRED & DEAF EMPLOYEES. | | |
| | (A) PURCHASE OF CRUTCHES AND OTHER ACCESSORIES. | | |
| | (B) PURCHASE OF HEARING AID FOR DEAF EMPLOYEES. | | |
| | (C) PURCHASE OF SPECTACLES FOR VISUALLY IMPAIRED. | | |
| 7 | INCENTIVE FOR PROMOTION OF SMALL FAMILY NORMS | | |
| 8 | FUNERAL EXPENSES | | |
| 9 | FREE EDUCATION BENEFIT TO THE CHILDREN OF DECEASED EMPLOYEE | | |
| 10 | REIMBURSEMENT OF EITHER MEDICAL EXPENSES OR EXPENSES INCURRED TOWARDS PAYMENT OF PREMIUM TOWARDS MEDICLAIM POLICY INCURRED BY RETIRED EMPLOYEES | | |
| 10A | MEDICAL EXPENSES TO SPOUSES OF DECEASED EMPLOYEES | | |
| 11 | DISPENSARY | DOCTORS' REMUNERATION PAID | --- |
| | | EXPENSES INCURRED TOWARDS PURCHASE OF MEDICINES | --- |
| | Total* | | |

*Ensure that the total shall tally with the Staff welfare Measure scheme expenditure of the Circle as per CBS system.

ASST. GENERAL MANAGER

ANNEXURE 8

**CANARA BANK
HEAD OFFICE, BENGALURU**

FROM:

TO:

.....
Canara Bank

The Senior Manager/Manager
Canara Bank

.....

.....

.....
/Office

.....Branch

**APPLICATION FOR REIMBURSEMENT OF EDUCATIONAL EXPENSES OF CHILDREN UNDER STAFF
WELFARE MEASURES - 2020-21**

**(Applicable to those ex-employees who are on the rolls of the Bank as on 01.04.2020 and
superannuated/voluntarily retired subsequently)**

1. Name of the ex-employee & Staff No. :

2. Designation :

3. Present Place of Working :

4. Name of the son/daughter for whom
Educational Expenses reimbursement
is claimed :

5. Class/Course in which the above
son/daughter of the ex-employee
is studying and the name of the
school/college :

6. Amount of Educational Expenses
reimbursement claimed for the
academic year 2020-21
(Enclose proof of study) :

I hereby declare that the above information is true and correct. I request you to reimburse the amount of Rs..... (Rupees..... only) in terms of Memo No.3/2021 dated 13.01.2021* {I also declare that my spouse working in the Bank in Branch/Office has not claimed the above benefit.}

Yours faithfully,

DATE:

Signature of the Ex-Employee

* Strike-off if not applicable.

ANNEXURE 9

CANARA BANK
HEAD OFFICE : BENGALURU

From :

To:

Canara BankThe Senior Manager/Manager
Canara Bank
HRM Section
Circle Office

.....

FINANCIAL ASSISTANCE TO THE CHILDREN OF EX-SUB-STAFF EMPLOYEES

[As per Memo No.3/2021 dated 13.01.2021]

(Applicable to those ex-employees who are on the rolls of the Bank as on 01.04.2020 and
superannuated/voluntarily retired subsequently)

1. Name of the Ex-Subordinate cadre employee :
2. Staff No. :
3. Present Place of working :
4. Name of the son/daughter for whom the Financial Assistance is claimed :
5. Course to which the employee's son/ daughter was admitted [i.e., Matriculation/HSC/ISC during academic year 2019-20] :
 - i) Name of the institution in which the ex-employee's son/daughter was studying :
 - ii) Duration of the course :
 - iii) Whether any merit scholarship is already received (If yes, furnish full particulars) :
6. Marks secured and class obtained by the above ex-employee's son/daughter in the Matriculation/HSC/ISC [Proof to be enclosed. Branch Managers /Section Heads are required to verify the original and certify the copy] :

I hereby declare that the above information are true and correct. I have also read the contents of Memo No.3/2021 dated 13.01.2021 and agree to abide by the contents of the same.

Forwarded to HRM Section,

Circle Office.....

Yours faithfully,

SENIOR MANAGER/MANAGER
DATE:

SIGNATURE OF THE EX- EMPLOYEE

ANNEXURE 10

CANARA BANK
HEAD OFFICE : BENGALURU

FROM :

TO:

.....
Canara BankThe Senior Manager/Manager
Canara Bank
HRM Section
Circle Office

.....

.....

.....

Dear Sir,

**Sub: Request for reimbursement of expenses incurred for total medical check-up
- Memo No.3/2021 dated 13.01.2021.****(Applicable to those ex-employees who are on the rolls of the Bank as on 01.04.2020 and
superannuated/voluntarily retired subsequently)**

I request you to consider reimbursement of the expenses incurred by me/and my spouse towards total medical checkup which me/my spouse have undergone under Staff Welfare Measures. I hereby furnish the required details:

1. Date of Birth (Ex-employee) :
2. Name of the spouse (If claimed for spouse) :
3. Total amount claimed :
4. Number of original bills/vouchers enclosed :
5. Number of copies of reports enclosed :
6. Number of tests conducted :

Yours faithfully,

DATE:

SIGNATURE OF THE EX-EMPLOYEE

Contact Details & E-Mail Ids of H R M Section of Circle Offices.

| SL No | Name of Circle | Phone | E-Mail ids |
|-------|------------------------|------------------------------|------------------------------|
| 01 | Agra | 81929 99359 | hrmcoagra@canarabank.com |
| 02 | Ahmedabad | 079-26586202 | hrmcoahd@canarabank.com |
| 03 | Bhopal | 0755-2576547 | hrmcobpl@canarabank.com |
| 04 | Bhubaneshwar | 0674-2391330 | hrmcobhu@canarabank.com |
| 05 | Chandigarh | 0172-2605238 | hrmcochd@canarabank.com |
| 06 | Delhi | 011-26286217 | hrmcodel@canarabank.com |
| 07 | Guwahati | 0361-2456821 | hrmcoguw@canarabank.com |
| 08 | Hubballi | 0836-2270352 0836-2270355 | hrmcohub@canarabank.com |
| 09 | Jaipur | 0141-2222884 | hrmcojpr@canarabank.com |
| 10 | Karnal | 0184-2265120 | hrmcokar@canarabank.com |
| 11 | Kolkata | 033-22831508 | hrmcokol@canarabank.com |
| 12 | Lucknow | 0522-2307607 | hrmcoluck@canarabank.com |
| 13 | Manipal | 94498 62854 | hrmcompl@canarabank.com |
| 14 | Mumbai | 022-26535329 | staffocomcity@canarabank.com |
| 15 | Patna | 0612-2320843 | hrmcoapat@canarabank.com |
| 16 | Ranchi | 0651-2331529 | hrmranchico@canarabank.com |
| 17 | Pune | 020-25530624 | hrmcoarne@canarabank.com |
| 18 | Bengaluru | 080-25586074 | blrhrm@canarabank.com |
| 19 | Chennai | 044-24349357 | hrmcochn@canarabank.com |
| 20 | Hyderabad | 040-23436923 | hrmcohyd@canarabank.com |
| 21 | Madurai | 0452-2333828 | hrmcomdu@canarabank.com |
| 22 | Mangaluru | 0824-2441097 | hrmcomlr@canarabank.com |
| 23 | Trivandrum | 0471-2331599 | hrmcotvm@canarabank.com |
| 24 | Vijayawada | 0866-2428852 | hrmcovij@canarabank.com |
| | SAS Inspection Wing,HO | 080-25581885 | inspwingsas@canarabank.com |
| | Pension Fund, H.O. | 080-25323801 | hopenfund@canarabank.com |
| | I R Section, H.O. | 080-22533807 | hoir@canarabank.com |
| | H O S A Section | 080-22223161 | |