

Operations & Services Department
Head Office, Baroda

CIRCULAR TO ALL BRANCHES / OFFICES IN INDIA

Dear Sir / Madam,

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

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

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


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

If name is long, it may be written in short. Detail Job Card is attached.

Please note this process is only for staff pensioner.

Please ensure compliance.

Yours faithfully,


Pankaj Mittal
General Manager
(Operations & Services)

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JOB CARD – Mandatory Updation of RELATION CODE in Staff accounts**1. Staff accounts :**

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

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

- Invoke the menu HACM

Finacle
Universal Banking Solution from Infosys
01 July 2021 | User: DR67 | 0530 | Menu Shortcuts | Go

Customer A/c Maintenance

Function * M-Modify
A/c ID * 05300100013231

Go Clear

- After clicking on GO, visit RELATED PARTY tab

Customer A/c Maintenance

Function Modify
A/c ID 05300100013231 0530 INR KALIGI POORNA CHANDRARAO
CIF ID GOK004718 KALIGI POORNA CHANDRARAO
General Ledger Subhead Code 13421 - OTHER SAVINGS BANK
Scheme Code SB112 - SAVINGS BANK STAFF

Others Flex-Deposit Document Linked Deposits Add. Info. K/sign Credit Card Details Payment System

General Link Collaterals Interest & Tax Scheme Nomination Related Party MS Codes

Add

Relation Type *
Statement Frequency
Dispatch Mode
Payment system message frequency

Relation Code
Next Pass Sheet Print Date
Designation Code
Next Payment System Print Date

Record 1 of 1

- Select RELATION CODE as “SELF” from the searcher for the RELATION TYPE “MAIN”

Universal Banking Solution from Infosys 01 July, 2021 | User: DR67 | 0530 | Menu Shortcut | Go

Customer A/c. Maintenance

Function: Modify
 A/c. ID: 05300100013231 0530 INR KALIGI POORNACHANDRARAO
 Cif ID: GOK004718 KALIGI POORNACHANDRARAO
 General Ledger Subhead Code: 13421 - OTHER SAVINGS BANK
 Scheme Code: SB112 - SAVINGS BANK STAFF

Others Flex-Deposit Document Linked Deposits Addl. Info. Kisan Credit Card Details Payment System

General Link Collaterals Interest & Tax Scheme Nomination Related Party MS Codes

Add

Relation Type * Record 1 of 1

Statement Frequency

Dispatch Mode

Designation Code

Next Pass Sheet Print Date

- Click on SUBMIT and verify using menu HACM.

2. Staff Family pensioner accounts :

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

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

- Invoke the menu HACM

Finacle Universal Banking Solution from Infosys 01 July, 2021 | User: DR67 | 2904 | Menu Shortcut | Go

Customer A/c. Maintenance

Function * Help

A/c. ID *

Go Clear

- After clicking on GO, visit RELATED PARTY tab

Universal Banking Solution from Infosys 01 July, 2021 | User: DR67 | 2904 | Menu Shortcut | Go

Customer A/c. Maintenance

Function: Modify
 A/c. ID: 06650100006707 2904 INR UMANATH MSHRA
 Cif ID: 003809914 UMANATH MSHRA
 General Ledger Subhead Code: 13421 - OTHER SAVINGS BANK
 Scheme Code: SB112 - SAVINGS BANK STAFF

Others Flex-Deposit Document Linked Deposits Addl. Info. Kisan Credit Card Details Payment System

General Link Collaterals Interest & Tax Scheme Nomination Related Party MS Codes

Add

Relation Type * Record 1 of 1

Statement Frequency

Dispatch Mode

Payment system message frequency

Relation Code

Next Pass Sheet Print Date

Designation Code

Next Payment System Print Date

- Select RELATION CODE as “FPS” from the searcher for the RELATION TYPE “MAIN”

Universal Banking Solution from Infosys 01 July 2021 | User: DR67 | 2004 | Menu Shortcuts | Go

Customer A/c. Maintenance

Function Nbdify
 A/c. ID 06650100006707 2904 INR UMANATH MISHRA
 CIF ID 003809914 UMANATH MISHRA
 General Ledger Subhead Code 13421 - OTHER SAVINGS BANK

Scheme Code SB112 - SAVINGS BANK STAFF

Others Ex-Deposit Document Linked Deposits Add. Info. Klign Credit Card Debits Payment System
 General Link Collaterals Interest & Tax Scheme Nomination Related Party MS Codes

Add

Relation Type *

Statement Frequency

Dispatch Mode

Payment system message frequency

Relation Code FPS Record 1 of 1

Next Pass Sheet Print Date

Designation Code

Next Payment System Print Date

- Enter the Name of Deceased staff and Deceased on Date in the Field “NOTES”

Address Line 2 SHIBABAMANDIR MARG BORIVALI WEST

City MUMBA

Country IN

Phone No. Type COMMPH1

Telex No.

Email ID Type COMEML

Start Date

AmtL

Address Line 3

State MH

Postal Code 400092

Phone No. +09(923)878661

Fax No.

Email ID umanmishra@yahoo.co.in

Print Statement Yes No

Print Advice for Standing Instruction Yes No

Print Debit Advice Yes No

Notes NAME OF DECEASED STAFF
DECEASED ON DATE

- Click on SUBMIT and verify using menu HACM.

For any assistance, Branch may lodge a request at Global Help Desk Portal URL
<http://helpdesk.bankofbaroda.co.in:8080/SM/ess.do>

OR

Contact on 999999 through IP Phone

OR

Lodge a call with LOCAL HELP DESK /CBS operations team may be contacted.
