

Annexure-I

'SBI TRIBUTE' SCHEME
CHECKLIST/ SOP FOR THE OPERATING FUNCTIONARIES

- I. Upon receiving the intimation of death, Nodal Branch shall arrange to provide a one-time lump sum amount of Rs. 30,000/- as a gesture of gratitude and support, preferably within 72 hours of death to the bereaved family.
- II. Nodal Branch: Pension paying branch of the pensioner & home branch of the retiree has been designated as nodal branch for the TRIBUTE Scheme. In case of demise of the pensioner/retiree happening at a place other than the usual place of residence, branch nearest to the place of demise will perform the role of the nodal branch.
- III. Identification of the Pensioner/ Retiree: upon receiving death intimation of the pensioner/ retiree, branch to ascertain details of the deceased pensioner/ retiree and identify the family pensioner or in their absence, the next of kin (NOK).
- IV. List of documents: copy of the following documents may be obtained on priority for extending the financial benefit envisaged under the scheme:
 - i. Hospital/ Doctor issued provisional Death Certificate (initially).
 - ii. Pensioner identity card/ Retiree identity card/ Retirees' Group Mediclaim Policy A/ Policy B card.
 - iii. ID proof of family pensioner/ NOK.
- V. Payment under the scheme shall be made in the pensioner/ retiree's joint account with the family pensioner or by Banker's Cheque/ Demand Draft to NOK, by debiting the Branch Suspense account and further raising IBTS entry on Circle OAD, in consultation with the Circle PPG Department. The parent circle of the pensioner / retiree shall reconcile the entry by debiting the Charges Account. On development of the functionality in HRMS, manual process will be discontinued.