

Pensions Administration Branch

Checklist

(Required Documents for Retirement)

INSTRUCTION:

1. Please read the instructions overleaf for guidance.

The following documents must be submitted to the Pensions Administration Branch, Ministry of Finance and the Public Service for the calculation of retiring benefits. This checklist is applicable to persons proceeding on normal retirement on the Grounds of Age.

Pension Election Form *(Form-PAU-002)*

Birth Certificate (certified copy)

Statutory Declaration of Age *(Form-PAU-002)*

Marriage Certificate (certified copy)

Decree Absolute (certified copy)

Pension Particular [should state diligence & fidelity]

Statement of Earnings

Taxpayer Registration Number (TRN)

Letter from Jamaica Civil Service Mutual Thrift Society (Indebtedness Letter)

Application for Advance & Alimentary Allowance *(Form-PAU-001)*

CPO / Letter of Approval for Retirement

Cover Letter from Ministry/Department

Indebtedness

Period of Service Record / ME Form (for Teachers)

Additional documents needed where the Officer:

1. **Is retiring on the grounds of Ill-health.**

Medical Board Report / Letter from Senior Medical Officer

1. **Died before receiving retiring benefits.**

Death Certificate / Burial Order

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| **Pension Election Form** | This is a form letter where the retiree elects how he/she wishes to receive his/her retiring benefits (Form-PAU-002). |
| **Statutory Declaration of Age** | Birth certificate must bear the pensioner’s father’s name/or his/her full name should be entered in the 9th/26th column of the birth certificate. If this is not so, the Birth Certificate must be accompanied by a Statutory Declaration of Age (Form-PAU-002)*.*  Statutory Declaration can also be completed by the pensioner when there is a variation of name spelling. |
| **Pension Particular** | Pension particulars should be completed, primarily with information from the Service Record.  The Pension Particular is a form summarizing the information on the Period of Service Record. |
| **Certificate of Diligence & Fidelity** | This can be found at the bottom of the Pensions Particular form and must be completed in all circumstances. |
| **Statement of Earnings** | Statement showing the salary for the last three years of employment immediately preceding the date of retirement. |
| **Letter from Jamaica Civil Service Mutual Thrift Society (JCSMTS)** | Letter from JCSMTS indicating the retiree’s indebtedness to the Credit Union. |
| **Application for Advance & Alimentary Allowance** | This form is to be used when applying for an advance on the pension if the pension particulars have been submitted to the Ministry of Finance and the Public Service. An advance on the pension can be an advance or an alimentary allowance or both (Form-PAU-001). |
| **CPO / Letter of Approval for Retirement** | Letter of Approval for Retirement is the letter from the Ministry/Department with Delegation of Authority which clearly states the effective date and reason for retirement.  CPO approval for retirement is the letter from the Office of the Services Commission which clearly states the effective date and reason for retirement. |
| **Cover Letter from Ministry/Department** | This is the letter from the Ministry/Department submitting the documents to the Pensions Administration Branch, MoFPS. |
| **Indebtedness** | The Ministry/Department must clearly state the indebtedness of the officer to the Government of Jamaica. |
| **Period of Service Record** | Form/Document in the prescribed format detailing an officer’s employment history.  The Service Record should be signed by Head of Department/Head of Section/Unit.  All entries should be initialled.  Appointment, promotion, leave, salary scale and salary paid must be entered.  Period of pre-retirement leave. Memo Ref. No. and date verifying leave should be stated clearly. Last entry should be the effective date of retirement/resignation. |
| **Medical Board Report / Letter from Senior Medical Officer** | Medical Board Report must state clearly whether ailment is of the body and/or mind, whether the person is fit for further services and must be signed by two medical officers. |
| **Statutory Declaration of**  **service** | Should be completed by a current or former senior official in the organization. The senior official should operate within a managerial capacity and provide supervision to the officer.  The status of the person completing the statutory declaration should be clearly stated (Form-PAU-005). |

**Information Guide**