

**Annexure -II**

**PRADHAN MANTRI SURAKSHA BIMA YOJANA (PMSBY)  
CLAIM-CUM-DISCHARGE FORM**

(To be submitted preferably within 30 days of the occurrence of the accident of the insured member giving rise to the claim)

**To be filled by the insured member in case of his accidental disability claim or by his nominee in case of death of insured member**  
(or in case the nominee is a minor, his/her appointee<sup>1</sup>, and in case of no nomination or the nominee pre-deceasing insured member, the claimant<sup>2</sup> legal heirs of the insured)

**Part 1. Details of the member enrolled under PMSBY**

- (1) Name:
- (2) Address:
- (3) Bank / post office account number:
- (4) Name of Village /Town / City----- Name of District-----
- (5) Name of State-----PIN Code-----
- (6) Day, date, and time of accident:
- (7) Place of occurrence:
- (8) Nature of accident<sup>3</sup>:
- (9) Date of death:
- (10) Cause of death / disability <sup>4</sup>(please specify):
- (11) Type of Disability (Total permanent or partial permanent):
- (12) Document attached as proof of permanent disability<sup>5</sup> / death<sup>6</sup>:
- (13) Aadhaar number<sup>7</sup> (Optional):
- (14) Income-tax Permanent Account Number (PAN)<sup>7</sup> (Optional):

**Part 2. Details of the nominee in case of death of insured member:**

(or, in case the nominee is a minor, his/her appointee<sup>1</sup>, and in case of no nomination or the nominee pre-deceasing insured member, the claimant<sup>2</sup> legal heirs of the insured)

1. Name of the nominee:
2. Age of nominee:

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3. In case the nominee is a minor, name of the appointee<sup>1</sup>:
4. In case of no nomination or nominee pre-deceasing the insured member, name of the claimant<sup>2</sup>:
5. Proof of death<sup>6</sup> of nominee in case of nominee pre-deceasing the insured member:
6. Relationship of the nominee/claimant with the deceased:
7. Contact mobile number:
8. Contact email address:
9. Contact address:
10. Details of the nominee/appointee/claimant (as the case may be):
  - (1) Particulars of bank account into which the claim amount is to be remitted:
    - (a) Account number:
    - (b) Name of bank:
    - (c) Branch IFS Code:
  - (2) Aadhaar number<sup>7</sup>(Optional):
  - (3) Income-tax PAN<sup>7</sup>(Optional):
  - (4) KYC document<sup>8</sup> attached as proof of identity:

I hereby declare that details submitted above are true to the best of my knowledge, the documents attached in support of this claim are genuine, and I have not claimed the amount payable under PMSBY in respect of the member named above earlier or in respect of any other account of the member with any bank or post office.

Date:

(Signature of the insured member/  
nominee/appointee<sup>1</sup>/claimant<sup>2</sup>)

**Attached documents:**

- (1) Proof of permanent disability due to accident or death due to accident of the insured member, as the case may be
- (2) Aadhaar and PAN number of the insured member and claimant<sup>7</sup>(Optional)
- (3) KYC document<sup>8</sup> in respect of the nominee/appointee/claimant (as the case may be)
- (4) First two pages of passbook, or bank account statement showing account details, or cancelled cheque of the account of the nominee/appointee/claimant (as the case may be)

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- (5) Proof of death<sup>6</sup> of nominee in case of nominee pre-deceasing the insured member
- (6) Proof of being legal heir, in case the claimant is other than the insured member/nominee/appointee
- (7) Advance receipt for discharge of claim, duly filled in and signed

**To be filled by the branch from enrolment data.**

**Part 3: Details in respect of the insured member**

1. Bank account number (as per bank's CBS records):
2. Bank name:
3. Branch name:
4. Branch IFS Code:
5. Name of father/husband of the member:
6. Date of birth (as per the KYC document):
7. Name of the insurer:
8. Name of the nominee:
9. Date of debit of premium from the bank account:
10. Date of remitting the premium into insurer's account:

It is certified that the above information is true as per PMSBY enrolment data and bank records.

Place:  
Date:

(Signature and seal of the authorised official of the bank)

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**PRADHAN MANTRI SURAKSHA BIMA YOJANA**  
**Advance receipt for discharge of claim**

In consideration of approval of my claim referred above, I hereby accept from \_\_\_\_\_  
(name of the insurer) the sum of Rs. \_\_\_\_\_ (Rs. One lakh in case of permanent  
partial disability and Rs. two lakhs in case of permanent total disability or death) only in full  
and final settlement and discharge of my claim under the said policy covering insurance in  
respect of member Shri / Ms \_\_\_\_\_.

Signature of the witness  
Name of witness:  
Address:

Signature of the insured member/nominee/appointee/claimant  
Date:

Countersignature of authorised official of the bank  
Date:  
Name:  
Name of bank:  
Branch:  
Office stamp

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**Annexure-III**

**Check List for banks for settlement of PMSBY claims by partner insurer**  
**(All appropriate documents to be verified and checked by the bank and blanks to be filled up)**

01	Name of the Account Holder (Insured member)	
02	Bank / post office account number	
03	To check and confirm that the date of death / accident falls within the policy period	
04	Date of debit of premium to the bank account on: (Copy of passbook to be attached and certified)	...../...../.....
	Date of remittance to the insurer on:	...../...../.....
05	To check eligibility of the benefit transfer from the following:  <b>Any of the following KYC document of the insured member with the bank:</b> AADHAAR card or Electoral Photo Identity Card (EPIC) or MGNREGA card or Driving License or PAN card or Passport  <b>Age of insured as per eligibility of scheme</b>	
06	To check that the duly completed claim form is submitted along with the following documents: 1. Proof of permanent disability due to accident <sup>5</sup> or death due to accident <sup>6</sup> of the insured member, as the case may be. 2. Aadhaar and PAN number of the insured member and claimant <sup>7</sup> 3. KYC document <sup>8</sup> in respect of the applicant 4. First two pages of passbook, or bank account statement showing account details, or cancelled cheque of the applicant's account 5. Proof of death <sup>6</sup> of nominee, in case the nominee has predeceased the insured member 6. Proof of being legal heir, in case the applicant is a claimant other than insured member/nominee/appointee 7. Advance receipt for discharge of claim, duly filled in and signed	
07	<b>Verification of details of nominee/claimant</b>	

Head Office: 19-565/11, 3<sup>rd</sup> floor, Sai Yashus, Chittoor-517002, Phones: 233595, 232535, Email: [svgbhctr@yahoo.co.in](mailto:svgbhctr@yahoo.co.in), Website: [www.saptagirigrameenabank.in](http://www.saptagirigrameenabank.in)

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	<ol style="list-style-type: none"> <li>1. Check details of nominee from enrolment data / form</li> <li>2. Confirm that nominee is not minor. In case of minor nominee, appointee named by the insured member in the enrolment form would be the claimant</li> <li>3. If there is no nomination or the nominee has predeceased the insured member, claimant should be one of the legal heirs of the member</li> <li>4. Check KYC proof submitted by the nominee/claimant. Acceptable KYC document may be any of the following: AADHAAR card or Electoral Photo Identity Card (EPIC) or MGNREGA card or Driving License or PAN card or Passport</li> <li>5. Bank account details of nominee/ appointee/ claimant to be checked and confirmed from the first two pages of his passbook, or bank office account statement showing account details, or cancelled cheque of the applicant's account.</li> </ol>	
08	Bank to confirm that the said claim has not been paid or forwarded to insurer earlier by the bank.	
09	Bank to forward the claim documents and the signed checklist electronically to the designated email id / app of the partner insurer within seven days of receipt of the claim.	
10	Bank to upload claims data on Jansuraksha portal [ <a href="https://www.jansuraksha.gov.in/MIS">https://www.jansuraksha.gov.in/MIS</a> ].	

(Signature)

Name and designation of authorized officer of bank

Date:

Office seal

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### Useful information for claimants

- <sup>1</sup> The appointee is the person named by the member in his PMSBY enrolment form where the nominee is a minor.
- <sup>2</sup> A claimant where there is no nomination or the nominee has pre-deceased the insured member shall be one who is a legal heir and submits a succession certificate or legal heir certificate issued by a competent court or authority.
- <sup>3</sup> Accident means a sudden, unforeseen and involuntary event caused by external, violent and visible means.
- <sup>4</sup> Permanent Disability means any of the following:

Total and irrecoverable loss of both eyes or loss of use of both hands or feet or loss of sight of one eye and loss of use of one hand or foot	Total disability- claim amount payable is Rs two lakhs
Total and irrecoverable loss of sight of one eye or loss of use of one hand or foot	Partial disability- Claim amount payable is Rs one lakh

- <sup>5</sup> Documents in support of proof of permanent disability:  
FIR or Panchnama, along with (a) Disability certificate issued by the Civil surgeon and (b) hospital record supporting the same.
- <sup>6</sup> Documents in support of death due to accident may be any of the following:  
**(1) (a), (b) and (c) as under:**
  - (a) Any of the documents listed below as proof of death:
    - (i) Death certificate (issued by the registrar of births and deaths appointed by the state government for the local area)
    - (ii) Hospital discharge summary/certificate in respect of the deceased person, specifying his/her name, father's/husband's name, address and the date, time and cause of death
    - (iii) Certificate issued by the last attending Registered Medical Practitioner (doctor registered with the Indian Medical Council) in respect of the deceased person, specifying his/her name, father's/husband's name, address and the date, time and cause of death, which should be countersigned with his/her seal by a Gazetted officer of the Central or the State Government or by an officer of the deceased account holder's bank or any public sector bank or any public sector insurer
  - (b) FIR/ Panchnama
  - (c) Post Mortem report
- (2)** Certificate issued in respect of the insured member by the District Magistrate / Collector / Deputy Commissioner of the district concerned, or by any Executive Magistrate (Additional District Magistrate, Sub-Divisional Magistrate, Tehsildar/Talukdar, etc.) authorised by him/her, in the form prescribed in the claim settlement procedure for the scheme

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(3) In case of death due to accidents such as snake bite/ fall from tree, etc., hospital record specifying the deceased member's name, father's/husband's name, address and the date, time and cause of death in lieu of (a), (b) and (c) above.

<sup>7</sup> This information is desirable but not mandatory.

<sup>8</sup> Document in support of applicant's identity may be Aadhaar card or electoral photo identity card [EPIC] or MGNREGA card or driving license or PAN card or passport.

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