

Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

STAFF CIRCULAR NO.8221

Date: 18.03.2024

TO ALL BRANCHES / OFFICES

**STAFF WELFARE SCHEMES -MODIFICATIONS & REITERATION OF SCHEMES**


**HIGHLIGHTS OF CIRCULAR**

- Marginal enhancement in limits & Modification in Canteen Subsidy Scheme.
- Modification in Educational Schemes for Wards of the Employees.
- Modification in UBIREMAS Scheme.
- Non-refund of holiday home booking amount on account of cancellation from the 'Holiday Homes' Scheme.
- Enhancement in limits & modification in Schemes for providing Financial assistance to Physically Handicapped Employees for purchase of Crutches, other accessories.
- Enhancement in limits & modification in Schemes for providing Financial Assistance to Physically Handicapped Children of the Employees for reimbursement of School/Computer courses fees, purchase of Crutches, hearing aids and other accessories.
- Modification in Scheme of 50% Subsidy on Group Medical Insurance premium.
- Modification in Scheme for reimbursement for purchase of Spectacles.
- Introduction of Scheme on Subsidy for 'Group Insurance Scheme for Staff Loans'.
- Introduction of Scheme on 'Group Medical Insurance premium amount to all retirees having pension Rs.20,000/- & above (p.m.)

Attention is invited to Staff Circular nos. 7749 dated 22.08.2022, 7777 dated 17.09.2022 and 7962 dated 01.04.2023 vide which Staff Welfare Schemes were circulated.

We are pleased to inform that as per the recommendations of the Staff Welfare Committee in its meeting held on 03.01.2024, the Competent Authority had accorded its approval for various modifications in the Staff Welfare Schemes. The detailed modifications & reiteration of the Schemes are enclosed as Annexure-I.

All are advised to take a careful note of the same and bring contents of this circular to the notice of all concerned.

  
Chief General Manager (HR)

Encl.: Annexure-I - Modifications & Reiteration of Staff Welfare Schemes.



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

**INDEX**

S.N.	Particulars	Page No.
1	Canteen Subsidy Scheme	1 -3
2	Scheme for Antenatal Check-Up for Female Employees	4
3	Medical Clinic	5-7
4	Scheme for Financial Assistance to Employees, Who Are on Loss of Pay on Account of Hospitalization	8-9
5	Reimbursement Of 50% Of the Annual College Fees Incurred to The Wards of The Subordinate Staff	10-11
6	Scheme for Reimbursement of Expenses Towards Education of Wards	12-14
7	Scholarship Scheme for Wards of Employees	15-17
8	Honorarium to The Children of The Employees, Who Have Secured First Rank in the School Examination	18-19
9	Union Bank of India Retired Employees' Medical Assistance Scheme (UBIREMAS)	20-35
10	Ex-Gratia to Pre-1986 Employees	36
11	Bank's Holiday Homes	37-40
12	Bank's Transit Quarters	41-46
13	Financial Assistance to Physically Handicapped Employees for Purchase of Crutches, Other Accessories	47-48
14	Scheme for Financial Assistance to Physically Challenged Children of The Employees for Payment of School/Computer Courses Fees, Purchase of Crutches, Hearing Aids and Other Accessories	49-50
15	Scheme for Payment of Ex-Gratia Amount for Settlement of Remaining Outstanding Amount in The Staff Loan Accounts (SHL/SVL) Covered Under 'Group Insurance Scheme for Staff Loans	51-55
16	Honorarium To 'Union Youth'	56-57
17	50% Subsidy on IBA Group Medical Insurance Premium Amount to All Retirees/ Family Pensioners & Pre-1986 Retirees Who Are Having Pension Below Rs.20,000/- Per Month	58
18	Scheme for Grant of Funeral Expenses in The Event Of Demise Of In-Service Employee	59-61

A B

**Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai**

**Annexure I**

S.N.	Particulars	Page No.
19	'Grant of Financial Aid to The Bereaved Family Member on Demise of An Employee in Service'	62-64
20	Reimbursement for Purchase of Spectacles	65
21	Subsidy for Insurance Premium Amount Paid by The Retirees Under IBA Group Medical Scheme Having Pension Rs.20,000/- & Above (P.M.)	66
22	Subsidy for Insurance Premium Amount Paid by The Employees Under Group Insurance Scheme for Staff Loans	67





**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<u>SC. NO. 1</u>	<u>CANTEEN SUBSIDY SCHEME</u>
PARTICULARS	DETAILS
Objective	To provide canteen subsidy to all employees of the Bank.
Applicability	This scheme will be applicable to all the employees of the Bank but not to those appointed on contract or tenure/temporary basis.
Amount	<ul style="list-style-type: none"> <li>• Employees posted at places other than Central Office &amp; CO Annex Mangalore &amp; CO Annex Hyderabad shall be provided with reimbursement of Rs.250/- per month on declaration basis.</li> <li>• CO Annexes other than CO Annex Mangalore &amp; CO Annex Hyderabad shall be provided with reimbursement of Rs.250/- per month on declaration basis.</li> <li>• Employees posted under Central Office, CO Annex Mangalore &amp; CO Annex Hyderabad shall be provided with Rs.430/- per month as a Canteen subsidy as per existing procedure.</li> <li>• Wherever the Bank is having Canteen facility the subsidy payable to employees should be utilized to provide subsidized food by negotiating with the canteen contractors and paying the subsidy to the contractor.</li> </ul>
General Conditions	<ul style="list-style-type: none"> <li>• The payment under the Scheme shall be made on declaration basis to the employee except to the staff members who are posted under Central Office, CO Annex Hyderabad, CO Annex Mangalore &amp; such places where Bank is providing canteen facility.</li> <li>• The enhanced canteen subsidy to eligible employees will be payable from the month of January 2024. Hence, all employees who had already availed Canteen Subsidy for the month of January 2024 &amp; February 2024, are eligible to claim the balance amount.</li> </ul>
Application and Payment	The claim for reimbursement shall be applied as per existing practice.
Competent Authorities	<p>The Competent Authorities to sanction the claim manually in different Branches/Offices are under:</p> <ul style="list-style-type: none"> <li>• Branch Manager/Chief Manager of the branch for the employees posted under branches including MLPs/RLPs/LC Branches/ MCBs/ NPCs etc.</li> </ul>

A 14

Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

<u>SC. NO. 1</u>	<u>CANTEEN SUBSIDY SCHEME</u>
<u>PARTICULARS</u>	<u>DETAILS</u>
	<ul style="list-style-type: none"><li>• Chief Manager (Operations) for the employees posted under Regional Office/Field General Manager's Office.</li><li>• In charge of Office for the employees posted under Audit Office.</li><li>• In charge of Office for the employees posted under CO Annexes other than Mangalore &amp; Hyderabad.</li><li>• ZLC Heads/ ULA Heads for the employees posted under ZLCs/ ULAs.</li><li>• DGM/AGM for the employees posted under Union Bank Knowledge Centre.</li></ul>
Account no.	XXXXX8830003000
Enclosures	The format for claiming canteen subsidy on declaration basis is attached herewith.



Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

**FORMAT FOR CLAIMING CANTEEN SUBSIDY**

To

\_\_\_\_\_  
\_\_\_\_\_

I hereby request you to kindly reimburse canteen subsidy amount of Rs. 250/- in my account no.....for the month of..... for the amount spent by me on canteen expenses.

Name:

Emp No.:

Designation:

Sanctioned Rs. \_\_\_\_\_

\_\_\_\_\_ (Sanctioning Authority)

\_\_\_\_\_ (Branch/Office)

**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

**Annexure I**

<u>SC. NO. 2</u>	<u>SCHEME FOR ANTENATAL CHECK-UP FOR FEMALE EMPLOYEES</u>
PARTICULARS	DETAILS
Objective	The scheme envisages reimbursement of expenses incurred by female staff members for their antenatal checkup.
Applicability	The scheme will be applicable to all permanent female employees of Bank but not to those appointed on contract or tenure/temporary basis.
Amount	Antenatal check-up (4 months old) upto Rs. 5000/- shall be provided. The reimbursement can be claimed 2 times during the tenure of service of the female employee.
General Conditions	<ul style="list-style-type: none"> <li>• Concerned female employee has to apply online through Union Parivar for reimbursement and to submit the relevant bills for claiming the amount.</li> <li>• In case of tie-up arrangements, payment should be made directly to the service provider.</li> <li>• The records of sanction/payment will be properly maintained by Paying Department for audit purposes.</li> <li>• While uploading the invoices/bills in HRMS i.e. Union Parivar, all employees should ensure that invoice/bills uploaded should be 'Verified with Original' by the Dy. Branch Head/ Branch Head or the Departmental In-charge. Further, it should also be ensured that invoices/bills uploaded should clearly affix the remarks i.e. 'Verified with Original' (alongwith with mentioning the name, employee ID, designation &amp; signature of Officer/Executive verifying invoices/bills).</li> </ul>
Competent Authorities	<ul style="list-style-type: none"> <li>• HR Department of concerned Regional Office</li> <li>• HR Suvidha in case of Central Office</li> </ul>
Account no.	XXXXX8830041000





**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<u>SC. NO. 3</u>	<u>MEDICAL CLINIC</u>																								
PARTICULARS	DETAILS																								
Objective	<p>As part of staff welfare measure and in commemoration of Bank's Platinum Jubilee Year in 1994, the medical clinics were established at all centers where Zonal/Regional Office was functioning. A minimum space of 400/500 sq ft is made available to these clinics. The working hours of this clinic will be as follows:</p> <table border="1" style="margin-left: auto; margin-right: auto; border-collapse: collapse;"> <thead> <tr> <th style="text-align: center;">Day</th> <th style="text-align: center;">Timings</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Monday to Friday</td> <td style="text-align: center;">3.30 p.m. to 5.00 p.m.</td> </tr> <tr> <td style="text-align: center;">Saturday</td> <td style="text-align: center;">1.00 p.m. to 2.00 p.m.</td> </tr> </tbody> </table>	Day	Timings	Monday to Friday	3.30 p.m. to 5.00 p.m.	Saturday	1.00 p.m. to 2.00 p.m.																		
Day	Timings																								
Monday to Friday	3.30 p.m. to 5.00 p.m.																								
Saturday	1.00 p.m. to 2.00 p.m.																								
Maximum Monthly Remuneration Payable to doctors/compounder	<p>In order to provide better medical services to the staff members, the remuneration payable to doctors/compounder and also the monthly limit for purchase of medicines have been increased, which are as under:</p> <p style="text-align: right;">(Amount in Rs.)</p> <table border="1" style="margin-left: auto; margin-right: auto; border-collapse: collapse;"> <thead> <tr> <th style="text-align: center;">Particulars</th> <th style="text-align: center;">Metropolitan Centers</th> <th style="text-align: center;">Other Centers</th> </tr> </thead> <tbody> <tr> <td>General Practitioner</td> <td style="text-align: center;">18000/-</td> <td style="text-align: center;">16875/-</td> </tr> <tr> <td>Cardiologist</td> <td style="text-align: center;">22500/-</td> <td style="text-align: center;">19125/-</td> </tr> <tr> <td>Cardiologist who is also working as a General Practitioner</td> <td style="text-align: center;">24750/-</td> <td style="text-align: center;">21375/-</td> </tr> <tr> <td>Compounder</td> <td style="text-align: center;">4500/-</td> <td style="text-align: center;">3750/-</td> </tr> <tr> <td>Checking of Hospitalization Bills by doctors</td> <td style="text-align: center;">1500/-</td> <td style="text-align: center;">1125/-</td> </tr> <tr> <td>Monthly limit for purchase of medicines at medical clinic</td> <td style="text-align: center;">18000/-</td> <td style="text-align: center;">14250/-</td> </tr> <tr> <td>Homoeopathy Doctor / Ayurvedic Doctor*</td> <td style="text-align: center;">14625/-</td> <td style="text-align: center;">7500/-</td> </tr> </tbody> </table> <p>*Services of anyone or both (Homeopathy and Ayurvedic Doctor) can be utilized subject to remuneration within the prescribed limits.</p>	Particulars	Metropolitan Centers	Other Centers	General Practitioner	18000/-	16875/-	Cardiologist	22500/-	19125/-	Cardiologist who is also working as a General Practitioner	24750/-	21375/-	Compounder	4500/-	3750/-	Checking of Hospitalization Bills by doctors	1500/-	1125/-	Monthly limit for purchase of medicines at medical clinic	18000/-	14250/-	Homoeopathy Doctor / Ayurvedic Doctor*	14625/-	7500/-
Particulars	Metropolitan Centers	Other Centers																							
General Practitioner	18000/-	16875/-																							
Cardiologist	22500/-	19125/-																							
Cardiologist who is also working as a General Practitioner	24750/-	21375/-																							
Compounder	4500/-	3750/-																							
Checking of Hospitalization Bills by doctors	1500/-	1125/-																							
Monthly limit for purchase of medicines at medical clinic	18000/-	14250/-																							
Homoeopathy Doctor / Ayurvedic Doctor*	14625/-	7500/-																							
General Conditions	<ul style="list-style-type: none"> <li>• Employee who desires to avail the facility will seek prior permission of the Branch Manager/Departmental Head. While giving permission to attend the clinic, Branch</li> </ul>																								



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<u>SC. NO. 3</u>	<u>MEDICAL CLINIC</u>
PARTICULARS	DETAILS
	<p>Manager/Departmental Head will ensure that the employee's visit to the clinic does not interfere with his normal functions.</p> <ul style="list-style-type: none"> <li>• Further, for visiting the clinic, no conveyance charges or any other allowance will be payable.</li> <li>• The medical team will consist of a Cardiologist and General practitioner.</li> <li>• The General Practitioner will attend the clinic on all days i.e. 1½ hours from Monday to Friday and 1 hour on Saturday. The Cardiologist will attend the clinic two days in a week for 1½ hours each day.</li> <li>• One of the doctors (preferably the general practitioner) will be designated as Chief Medical Consultant, who will be responsible for overall administration / supervision of the clinic.</li> <li>• The expenses payable to the Chief Medical Consultant, other doctor, compounder as well as medicines, are debited to 'Expenditure Account - Medical Clinic.'</li> <li>• The Bank will not reimburse conveyance charges incurred by the medical practitioners.</li> <li>• The contract will be for a period of one year and will be renewed, from time to time.</li> <li>• The medical practitioners will not be entitled for any leave during the period of contract.</li> <li>• During the absence of a doctor, the Chief Medical Consultant will have to make arrangements for an alternative medical practitioner to be available at the clinic.</li> <li>• The Chief Medical Consultant will appoint a Compounder on his own and the remuneration payable to him will be made out of the lump sum amount to be paid by the Bank.</li> <li>• The Chief Medical Consultant will take care of furniture &amp; fixtures, equipment's etc. and will also ensure that the benefit of the clinic is not extended to outsiders. Medicines will be dispensed in the clinic for normal ailments like cough, cold, flu and fever, diseases of the respiratory system etc., minor dressings in case of injuries, abscess, sores etc. The clinic will not provide costly medicines. The clinic will also be equipped with Electro-Cardiogram, Blood Pressure Monitor, and Weighing Scale etc.</li> </ul>

**Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai**

**Annexure I**

<u>SC. NO. 3</u>	<u>MEDICAL CLINIC</u>
<u>PARTICULARS</u>	<u>DETAILS</u>
	<ul style="list-style-type: none"> <li>• Further, the verification regarding proper functioning of the Medical Clinics will be covered under Management Audit Process.</li> <li>• The facility of medical clinic will also be available to the retired employees of the Bank as well.</li> </ul>
Account No.	XXXXX8830013000

A A



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<u>SC. NO.4</u>	<u>SCHEME FOR FINANCIAL ASSISTANCE TO EMPLOYEES, WHO ARE ON LOSS OF PAY ON ACCOUNT OF HOSPITALISATION</u>
PARTICULARS	DETAILS
Objective	<p>There are instances where employees are forced to go on leave on loss of pay on account of hospitalization for undergoing treatment for major ailments like coronary disease, transplantaion surgery etc. Such employees are forced to incur substantial medical expenses for their treatment and at the same time do not receive salary. Many a time the employees' avail all sorts of leave to their credit and ultimately, the only option open to them is to go on leave on loss of pay on medical grounds. Normally the financial condition of such employees would be very precarious.</p> <p>Therefore, the objective of the Scheme is to provide financial assistance to employees who are on loss of pay on account of hospitalization.</p>
Applicability	The Scheme will be applicable to all permanent employees of the Bank but not to those appointed on contract or tenure/temporary basis.
Scope	The scheme covers payment of lump sum amount to the employees, who are on loss of pay. The facility will be made available for a maximum period of six months in the entire service of an employee.
Amount	Under the scheme, employees will be given financial assistance of Rs.5,000/- per month for a maximum period of 6 months and proportionately in case leave on loss of pay is less than one month (30 days).
General Conditions	<ul style="list-style-type: none"> <li>• An application in writing as prescribed under the scheme to be submitted by the employee concerned to the Branch Manager / Chief Manager / Departmental Head where the employee is working.</li> <li>• The application will be scrutinized and sanctioned by the Competent Authority.</li> <li>• The Employee should have exhausted all sorts of leave and must be on approved leave on loss of pay on medical grounds.</li> <li>• The disbursement of financial assistance will cease on the date of reporting of the employee for duties.</li> <li>• The applicant should have submitted bills seeking reimbursement of expenses under hospitalization scheme.</li> <li>• The details of approval accorded by the Competent Authority will be recorded in a register containing the mentioned details.</li> </ul>



Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

<b>SC. NO.4</b>	<b><u>SCHEME FOR FINANCIAL ASSISTANCE TO EMPLOYEES, WHO ARE ON LOSS OF PAY ON ACCOUNT OF HOSPITALISATION</u></b>									
<b>PARTICULARS</b>	<b>DETAILS</b>									
	<table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 10px;"> <tr> <td style="text-align: center;">Name of the staff</td> <td style="text-align: center;">Emp. No.</td> <td style="text-align: center;">Designation</td> </tr> <tr> <td style="text-align: center;">Amount of reimbursement sought for</td> <td style="text-align: center;">Amount approved</td> <td style="text-align: center;">Date of payment</td> </tr> <tr> <td style="height: 30px;"></td> <td></td> <td></td> </tr> </table> <ul style="list-style-type: none"> <li>The records of sanction/payment will be properly maintained for audit purposes.</li> <li>The Internal Auditors will, in their reports, make specific comments regarding compliance.</li> <li>The payment under this scheme will be debited to Expenditure Account- Staff Welfare Measures - Financial Assistance to Employees, who are on loss of pay on account of Hospitalization.</li> </ul>	Name of the staff	Emp. No.	Designation	Amount of reimbursement sought for	Amount approved	Date of payment			
Name of the staff	Emp. No.	Designation								
Amount of reimbursement sought for	Amount approved	Date of payment								
Competent Authority	<p>The Competent Authorities for sanction of applications under the scheme are as under:</p> <ul style="list-style-type: none"> <li>Branch Manager/Chief Manager of the branch in case of employees posted under branches including MLPs/RLPs/LC Branches/ MCBs/ NPCs etc.</li> <li>Chief Manager (Operations) in case of employees posted under Regional Office/Field General Manager's Office.</li> <li>Chief Manager (HR) in case of Central Office &amp; CO Annexes.</li> <li>In charge of Office in case of Audit Office.</li> <li>ZLC Heads/ ULA Heads in case of employees posted under ZLCs/ ULAs.</li> <li>DGM/AGM in case of employees posted under Union Bank Knowledge Centre.</li> </ul>									
Account No.	XXXXX8830008000									

✍️ ✍️



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<u>SC. NO. 5</u>	<u>REIMBURSEMENT OF 50% OF THE ANNUAL COLLEGE FEES INCURRED TO THE WARDS OF THE SUBORDINATE STAFF</u>
PARTICULARS	DETAILS
Objective	The scheme provides for reimbursement of 50% of the annual college fees paid by the subordinate staff for their wards. The reimbursement will be restricted to 2 children.
Applicability	The scheme will be applicable to all permanent subordinate staff members of the bank but not to those appointed on contract or tenure/temporary basis.
Amount	Amount of Reimbursement under the Scheme will be restricted to 50% of the annual college fee or Rs.10000/- per year whichever is less.
General Conditions	<ul style="list-style-type: none"> <li>• The payment under the scheme will be by way of reimbursement of expenses already incurred.</li> <li>• The scheme will be applicable only for 1<sup>st</sup> Graduation/Diploma Course and not for 11<sup>th</sup> or 12<sup>th</sup> standard.</li> <li>• Under the scheme, the reimbursement will be restricted either for 1st Graduation or for 1st Diploma. The Graduation or Diploma course should be recognized by the relevant Educational/Professional body.</li> <li>• The annual college fees will include term fees, examination fees, tuition fees and admission fees. Capitation fees/donation will not be eligible for reimbursement.</li> <li>• Concerned employee has to apply online through Union Parivar for reimbursement under the Scheme by uploading the requisite documents.</li> <li>• While uploading the invoices/bills in HRMS i.e. Union Parivar, (receipts evidencing payment of term fees, tuition fees, examination fees, admission fees etc.) all employees should ensure that requisite documents uploaded in HRMS i.e. Union Parivar should be 'Verified with Original' by the Dy. Branch Head/ Branch Head or the Departmental In-charge. Further, it should also be ensured that invoices/bills uploaded should clearly affix the remarks i.e. 'Verified with Original' (alongwith with mentioning the name, employee ID, designation &amp; signature of Officer/Executive verifying the documents/bills/invoices).</li> <li>• The employee should submit application on a yearly basis for claiming reimbursement.</li> </ul>



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<u>SC. NO. 5</u>	<u>REIMBURSEMENT OF 50% OF THE ANNUAL COLLEGE FEES INCURRED TO THE WARDS OF THE SUBORDINATE STAFF</u>
PARTICULARS	DETAILS
	<ul style="list-style-type: none"> <li>• Reimbursement under the scheme will cease from the date of cessation of employment of the applicant with the Bank.</li> <li>• The scholarship amount to be claimed by the employees latest by 15th March of the same FY. If not applied, the same will be lapsed and cannot be claimed in next FY.</li> <li>• The employees should submit single claim for reimbursement and no piecemeal claim will be entertained.</li> <li>• The ward of the employee should pass the qualifying examination every year so as to be eligible for reimbursement. The scheme will not be applicable in case the ward fails in the qualifying examination or detained in the same class. However, on being considered for promotion to the higher class the ward will become eligible for being covered under this scheme.</li> <li>• The payment under this scheme will be debited to Expenditure Account - Staff Welfare Measures - Reimbursement of 50% College Fees to wards of Subordinate Staff Members.</li> </ul>
Application & Payment	The claim for reimbursement should be applied in the relevant module in Union Parivar and amount will be auto credited after approval by HR Suvidha.
Account No.	XXXXX8830006000





**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<u>SC. NO. 6</u>	<u>SCHEME FOR REIMBURSEMENT OF EXPENSES TOWARDS EDUCATION OF WARDS</u>							
PARTICULARS	DETAILS							
Objective	To provide certain amount of financial support to employees by way of reimbursement of school fees, college fees, cost of textbooks etc. incurred on behalf of one dependent ward on yearly basis.							
Applicability	The Scheme will be applicable to all permanent employees of the Bank but not to those appointed on contract or tenure/temporary basis.							
Scope	<ul style="list-style-type: none"> <li>An employee can claim reimbursement amount under the Scheme for any one of the wards depending upon the class/course undergoing by the ward in a FY.</li> <li>Husband &amp; wife working in the Bank, can claim the reimbursement of their one dependent child only under the Scheme.</li> <li>The scheme covers reimbursement of School Fees/ College fees/Cost of textbooks/ examination fees etc. Capitation fees/donation, hostel charges, caution money, refundable fees etc. and will not be eligible for reimbursement under this scheme.</li> </ul>							
Amount	The reimbursement permissible under the scheme is as under: <table border="1" style="margin-left: auto; margin-right: auto; border-collapse: collapse; width: 80%;"> <thead> <tr> <th style="text-align: center;">Ward Studying in</th> <th style="text-align: center;">Amount (per year)</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Nursery to 12<sup>th</sup> standard (or its equivalent)*</td> <td style="text-align: center;">Rs.2500/- or actual claim whichever is less.</td> </tr> <tr> <td style="text-align: center;">For pursuing all type of educational courses after 12<sup>th</sup> standard (or its equivalent)*</td> <td style="text-align: center;">Rs.4000/- or actual claim whichever is less.</td> </tr> </tbody> </table> <p><i>*Courses which are considered equivalent to 12<sup>th</sup> standard as per norms of Educational Bodies in India, will also be considered.</i></p>		Ward Studying in	Amount (per year)	Nursery to 12 <sup>th</sup> standard (or its equivalent)*	Rs.2500/- or actual claim whichever is less.	For pursuing all type of educational courses after 12 <sup>th</sup> standard (or its equivalent)*	Rs.4000/- or actual claim whichever is less.
Ward Studying in	Amount (per year)							
Nursery to 12 <sup>th</sup> standard (or its equivalent)*	Rs.2500/- or actual claim whichever is less.							
For pursuing all type of educational courses after 12 <sup>th</sup> standard (or its equivalent)*	Rs.4000/- or actual claim whichever is less.							
General Conditions	<ul style="list-style-type: none"> <li>The payment under the scheme will be by way of reimbursement of expenses already incurred.</li> <li>Courses in which amount is paid in Indian Rupee only will be considered for reimbursement under the Scheme.</li> <li>Open &amp; Distance learning courses recognized by UGC/recognized government body in India can also be considered.</li> <li>Concerned employee has to apply online through Union Parivar for reimbursement by uploading relevant bills/proof receipts</li> </ul>							





**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<u>SC. NO. 6</u>	<u>SCHEME FOR REIMBURSEMENT OF EXPENSES TOWARDS EDUCATION OF WARDS</u>
PARTICULARS	DETAILS
	<p>evidencing payment of tuition fees, school fees, cost of textbooks etc.</p> <ul style="list-style-type: none"> <li>• While uploading the relevant documents/ invoices/bills in HRMS i.e. Union Parivar, (receipts evidencing payment of term fees, tuition fees, examination fees, admission fees etc.) all employees should ensure that relevant documents/ invoice/bills uploaded in HRMS i.e. Union Parivar should be 'Verified with Original' by the Dy. Branch Head/ Branch Head or the Departmental In-charge. Further, it should also be ensured that invoices/bills uploaded should clearly affix the remarks i.e. 'Verified with Original' (alongwith with mentioning the name, employee ID, designation &amp; signature of Officer/Executive verifying invoices/bills).</li> <li>• The employee should submit application on a yearly basis for claiming reimbursement.</li> <li>• The employees should submit single claim for reimbursement and no piecemeal claim will be entertained.</li> <li>• Reimbursement under the scheme will cease from the date of cessation of employment of the applicant with the Bank.</li> <li>• The scholarship amount to be claimed by the employees latest by 15th March of the same FY. If not applied, the same will be lapsed and cannot be claimed in next FY.</li> <li>• The ward of the employee should pass the qualifying examination every year so as to be eligible for reimbursement of College fees, tuition fees etc. Failure in the qualifying examination or detention will lead to ineligibility. However, on being considered for promotion, the ward will become eligible for being covered under this scheme.</li> <li>• The payment under the scheme for the Nursery to 12<sup>th</sup> standard, will be debited to Expenditure Account - Staff Welfare Measures - Reimbursement of School Fees to wards of Employees.</li> <li>• The payment under this scheme for courses after 12<sup>th</sup> will be debited to Expenditure Account - Staff Welfare Measures - Reimbursement of College Fees to wards of Employees.</li> </ul>
Application & Payment	The claim for reimbursement should be applied in the relevant module in Union Parivar and amount will be auto credited after approval by HR Suidha.



Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

<u>SC. NO. 6</u>	<u>SCHEME FOR REIMBURSEMENT OF EXPENSES TOWARDS EDUCATION OF WARDS</u>
PARTICULARS	DETAILS
Effective Date	<p>The revised scheme will be effective from 01.04.2024.</p> <p>Thus, till 31<sup>st</sup> March 2024, the Scheme for reimbursement of school fees etc. to wards of employees &amp; Scheme for reimbursement of College fees/cost of books etc. to wards of employees, pursuing engineering, medical, professional and career oriented degree courses circulated vide staff circular no. 7749 dated 22.08.2022 shall remain effective.</p>
Account No.	<ul style="list-style-type: none"><li>• XXXXX8830001000 for wards studying in Nursery to 12<sup>th</sup> standard.</li><li>• XXXXX8830018000 for pursuing all type of educational courses after 12th standard standard.</li></ul>

A/S

**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

**Annexure I**

<u>SC. NO. 7</u>	<u>SCHOLARSHIP SCHEME FOR WARDS OF EMPLOYEES</u>											
PARTICULARS	DETAILS											
Objective	The Bank has a scheme for awarding scholarships for Higher education to the children of Award Staff & Officer to encourage the employees to send their wards to pursue higher education.											
Applicability	The Scheme will be applicable to all permanent employees of the Bank but not to those appointed on contract or tenure/temporary basis.											
Amount	<p>The reimbursement amount provided under the Scheme is as under:</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-left: 20px;"> <thead> <tr> <th style="width: 40%;">Education/Courses</th> <th style="width: 30%;">Qualifying Exam</th> <th style="width: 30%;">Scholarship Amt (Annual)</th> </tr> </thead> <tbody> <tr> <td>11<sup>th</sup> &amp; 12<sup>th</sup> (or its equivalent)</td> <td>10<sup>th</sup> (or its equivalent)</td> <td>Rs.6000/-</td> </tr> <tr> <td>For pursuing courses after 12<sup>th</sup> (or its equivalent)*</td> <td rowspan="2">12<sup>th</sup> (or its equivalent)</td> <td>Rs.7200/-</td> </tr> <tr> <td>For pursuing courses after 12<sup>th</sup> (or its equivalent)* and staying in hostel</td> <td>Rs.9600/-</td> </tr> </tbody> </table> <p>*Courses which are considered equivalent to 12<sup>th</sup> standard as per norms of Educational Bodies in India, will also be considered.</p>	Education/Courses	Qualifying Exam	Scholarship Amt (Annual)	11 <sup>th</sup> & 12 <sup>th</sup> (or its equivalent)	10 <sup>th</sup> (or its equivalent)	Rs.6000/-	For pursuing courses after 12 <sup>th</sup> (or its equivalent)*	12 <sup>th</sup> (or its equivalent)	Rs.7200/-	For pursuing courses after 12 <sup>th</sup> (or its equivalent)* and staying in hostel	Rs.9600/-
Education/Courses	Qualifying Exam	Scholarship Amt (Annual)										
11 <sup>th</sup> & 12 <sup>th</sup> (or its equivalent)	10 <sup>th</sup> (or its equivalent)	Rs.6000/-										
For pursuing courses after 12 <sup>th</sup> (or its equivalent)*	12 <sup>th</sup> (or its equivalent)	Rs.7200/-										
For pursuing courses after 12 <sup>th</sup> (or its equivalent)* and staying in hostel		Rs.9600/-										
Eligibility	<p>1. The scholarship will be paid to only one child of the employee during any academic year fulfilling the following criteria. If Husband and wife both are working in our Bank, only one of them can claim the scholarship for their ward under the Scheme.</p> <p>2. Minimum % of qualifying marks required for availing scholarship under Scheme is as under:</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-left: 20px;"> <thead> <tr> <th style="width: 50%;">% of Marks for Wards of Sub-staff</th> <th style="width: 50%;">% of Marks for Wards of Clerk &amp; Officer</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">55% &amp; above</td> <td style="text-align: center;">60% &amp; above</td> </tr> </tbody> </table> <p>For example, if 60% &amp; above marks are acquired in 10<sup>th</sup> standard, the scholarship amount can be claimed in class 11<sup>th</sup> &amp; 12<sup>th</sup>.</p> <p>3. Total Marks secured in all subjects appeared will be considered for the purpose of minimum % of qualifying marks.</p>	% of Marks for Wards of Sub-staff	% of Marks for Wards of Clerk & Officer	55% & above	60% & above							
% of Marks for Wards of Sub-staff	% of Marks for Wards of Clerk & Officer											
55% & above	60% & above											



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<u>SC. NO. 7</u>	<u>SCHOLARSHIP SCHEME FOR WARDS OF EMPLOYEES</u>
PARTICULARS	DETAILS
	<p>4. After passing 10<sup>th</sup> standard examination or its equivalent with minimum % of prescribed marks, the scholarship will be granted to the wards of the employees for pursuing 11<sup>th</sup> &amp; 12<sup>th</sup>. Similarly, after passing 12<sup>th</sup> standard examination or its equivalent with minimum % of prescribed marks, the scholarship will be granted to the wards of the employees for pursuing courses after 12<sup>th</sup> standard or its equivalent.</p> <p>5. Open &amp; Distance learning courses recognized by UGC/recognized government body in India can also be considered.</p> <p>6. For claiming the aforesaid amount for staying in hostel, the hostel can be either college or private hostel.</p> <p>7. In case the ward stayed in college hostel/private hostel, the application for scholarship should be supported by Copy of hostel receipt issued by the private hostel/college or certificate issued by private hostel/college on their letterhead, confirming that the ward is staying in their hostel.</p> <p>8. The scholarship amount to be claimed by the employees latest by 15<sup>th</sup> March of the same FY. If not applied, the same will be lapsed and cannot be claimed in next FY.</p> <p>9. The scholarship sanctioned to the ward of deceased employee when he was alive will be continued even after death of employee, till the completion of the course for which the scholarship was awarded. In such case application for release of scholarship will be submitted by the spouse/child of deceased employee.</p> <p>10. Relaxation of one year not exceeding 2 attempts is given to the wards to appear in the qualifying examination so as to secure admission in the courses. Where the ward despite securing high percentage of marks in the XII Std. /HSC examination, does not get admission in the course, the mark-sheet pertaining to the XII Std/HSC examination of the previous academic year can be considered, in respect of application seeking scholarship for the current academic year in any stream. Similarly, relaxation of one year will be given to wards reappearing in 12<sup>th</sup> Standard/HSC examination for improving overall marks.</p>



**Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai**

**Annexure I**

<b>SC. NO. 7</b>	<b>SCHOLARSHIP SCHEME FOR WARDS OF EMPLOYEES</b>
<b>PARTICULARS</b>	<b>DETAILS</b>
	<p>11. The employee will be allowed to avail the benefit of scholarship from our bank even if their children are receiving any other scholarship from outside institution.</p> <p>12. Eligible employee has to apply online through Union Parivar for the claims by uploading requisite qualifying years marksheets &amp; certificates etc.</p> <p>13. While uploading the requisite certificates/marksheets in HRMS i.e. Union Parivar, all employees should ensure that requisite documents/invoice/bills uploaded in HRMS i.e. Union Parivar should be 'Verified with Original' by the Dy. Branch Head/ Branch Head or the Departmental In-charge. Further, it should also be ensured that requisite documents/invoice/bills uploaded should clearly affix the remarks i.e. 'Verified with Original' (alongwith with mentioning the name, Employee ID, designation &amp; signature of Officer/Executive verifying invoices/bills).</p>
Sanction & Payment	The claim for reimbursement should be applied in the relevant module in Union Parivar and amount will be auto credited after approval by HR Suvidha.
Effective Date	<p>The revised scheme will be effective from 01.04.2024.</p> <p>Thus, till 31<sup>st</sup> March 2024, Scheme for awarding scholarships for Higher Education to the children of Award Staff &amp; Officers circulated vide staff circular no. 7749 dated 22.08.2022 shall remain effective.</p>
Account No.	XXXXX8830007000

*AA*



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<u>SC. NO. 8</u>	<u>HONORARIUM TO THE CHILDREN OF THE EMPLOYEES, WHO HAVE SECURED FIRST RANK IN THE SCHOOL EXAMINATION</u>
PARTICULARS	DETAILS
Objective	<p>Many wards of the employees excel in their school education by obtaining first rank in the overall annual performance/general proficiency in their school examination. With a view to encourage the meritorious wards of the employee to enable them to achieve still better results in their academic pursuits, this scheme is evolved.</p> <p>The objective of the Scheme is to honor meritorious wards of permanent employees of the Bank, who have secured first rank in the overall annual performance in the school examination of their respective class/standard of study.</p>
Applicability	The scheme will be applicable to all employees but not to those appointed on contract or tenure/temporary basis.
Scope	The scheme will cover grant of one-time honorarium of Rs.3000/- per year to those wards of the employees who have secured first rank in the overall annual performance in the school examination of Standard-I to XII. Education of the wards commencing from Standard I to XII will be covered under this scheme, based on the examination held during the academic year.
General Conditions	<ul style="list-style-type: none"> <li>• Eligible employee has to apply online through Union Parivar for the claims by uploading requisite qualifying years marksheets &amp; certificates etc.</li> <li>• While uploading the requisite certificates/marksheets in HRMS i.e. Union Parivar, all employees should ensure that requisite documents/ invoice/bills uploaded in HRMS i.e. Union Parivar should be 'Verified with Original' by the Dy. Branch Head/ Branch Head or the Departmental In-charge. Further, it should also be ensured that requisite documents/ invoice/bills uploaded should clearly affix the remarks i.e. 'Verified with Original' (alongwith with mentioning the name, employee ID, designation &amp; signature of Officer/Executive verifying invoices/bills).</li> <li>• The payment under the scheme will be debited to 'Expenditure Account- Staff Welfare Expenses - Granting honorarium to the children</li> </ul>



Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

<u>SC. NO. 8</u>	<u>HONORARIUM TO THE CHILDREN OF THE EMPLOYEES, WHO HAVE SECURED FIRST RANK IN THE SCHOOL EXAMINATION</u>
PARTICULARS	DETAILS
	of the employees who have secured first rank in the school examination'. <ul style="list-style-type: none"><li>The amount to be claimed by the employees latest by the next Financial year in which the first rank is secured by the children.</li></ul>
Application & Payment	The claim for reimbursement should be applied in the relevant module in Union Parivar and amount will be auto credited after approval by HR Suvidha.
Account No.	XXXXX8830020000

A A



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<u>SC. NO.9</u>	<u>UNION BANK OF INDIA RETIRED EMPLOYEES' MEDICAL ASSISTANCE SCHEME (UBIREMAS)</u>								
PARTICULARS	DETAILS								
Objective	To extend medical assistance to the retired employees of the Bank. The Scheme has come to effect from 01.01.2003 and has been modified time to time.								
Who can become a member under the Scheme	<ul style="list-style-type: none"> <li>• Retired Employees of the Bank who have exited the Bank through 'Superannuation', VRS OR on Medical Incapacitation and have completed 60 years of age, along with their spouse can only opt for joining the Scheme, subject to the condition that the prospective member of the Scheme shall not be gainfully employed. The retiree along with his/her spouse shall be termed as 'Family Unit'.</li> <li>• The term 'gainfully employed' shall mean such primary/secondary member who is in employment and is receiving monthly remuneration of Rs. 12000.00 and above.</li> <li>• For joining the Scheme, the Retiree shall apply within 6 months of attaining 60 years and the membership number shall be allotted after due debit of one-time membership fee, as per the scheme guidelines.</li> <li>• If the secondary member (spouse) is not added while applying the membership, the same can be modified subsequently by sending an email to <a href="mailto:staffmediclaim@unionbankofindia.bank">staffmediclaim@unionbankofindia.bank</a>.</li> </ul>								
Amount payable for availing membership	<p>Presently, the non-refundable one-time membership fee as decided by the Staff Welfare Committee is as follows:</p> <table style="margin-left: auto; margin-right: auto;"> <tr> <td>Officers</td> <td>: Rs.5000/-</td> </tr> <tr> <td>Clerks</td> <td>: Rs.3000/-</td> </tr> <tr> <td>Sub Staff</td> <td>: Rs.2000/-</td> </tr> <tr> <td>Pre-1986 Retiree</td> <td>: Rs.1000/-</td> </tr> </table>	Officers	: Rs.5000/-	Clerks	: Rs.3000/-	Sub Staff	: Rs.2000/-	Pre-1986 Retiree	: Rs.1000/-
Officers	: Rs.5000/-								
Clerks	: Rs.3000/-								
Sub Staff	: Rs.2000/-								
Pre-1986 Retiree	: Rs.1000/-								
Reimbursement provided under the Scheme	<p><b><u>Annual Health Check-up</u></b></p> <ul style="list-style-type: none"> <li>• Reimbursement of annual health checkup, maximum to an extent of Rs. 2000.00 (Rs. Two Thousand Only), per financial year, per Family unit shall be payable in a Financial year, subject to production of original bill/cash receipt. Submission of report is exempted for claiming the reimbursement amount towards annual health checkup.</li> </ul>								

*[Handwritten Signature]*



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<u>SC. NO.9</u>	<u>UNION BANK OF INDIA RETIRED EMPLOYEES' MEDICAL ASSISTANCE SCHEME (UBIREMAS)</u>
PARTICULARS	DETAILS
	<ul style="list-style-type: none"> <li>• Reimbursement of Annual Health Checkup Expenses upto Rs.2000/- can be claimed for any test per year. This amount can be claimed for multiple checkups not exceeding 2 times in a financial year within the limit.</li> <li>• Retirees may claim reimbursement of the Annual Health Check-up done in a Financial Year upto one month after the end of Financial Year i.e. till April of the subsequent Financial Year. For example, Retirees having undergone Annual Health Check-up upto 31.03.2024 may claim the reimbursement of the same upto 30.04.2024.</li> </ul> <p><b><u>Hospitalization:</u></b></p> <ul style="list-style-type: none"> <li>• Reimbursement of Hospitalization expenses, maximum to an extent of Rs. 1.50 Lakhs (Rs. One Lakh Fifty Thousand Only), to the Family unit, during the entire currency of the membership, subject to ceiling of Rs. 0.50 Lakhs (Rs. Fifty Thousand Only) in a Financial year shall be payable.</li> <li>• During hospitalization, in case of death of primary member, the actual expenditure incurred or balance of limit available within overall limit of Rs.1.50 lac whichever is lower, will be reimbursed instead of existing cap of Rs.50,000/- to the spouse/nominee of the retiree. This provision is effective retrospective from 01.04.2023 Onwards. Hence, in such cases, the difference amount to be paid accordingly on submission of claim by the nominee.</li> <li>• The reimbursement of hospitalization expenses of Rs. 1.50 Lakhs is restricted to 100% of the eligible amount in case of primary member and 75% in case of secondary member, subject to the maximum reimbursement amount of Rs. 0.50 Lakhs in a Financial year.</li> <li>• The reimbursement for hospitalization expenses under the Scheme shall henceforth be made without any item-wise calculation/capping.</li> </ul>

A 2



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<u>SC. NO.9</u>	<u>UNION BANK OF INDIA RETIRED EMPLOYEES' MEDICAL ASSISTANCE SCHEME (UBIREMAS)</u>
PARTICULARS	DETAILS
	<ul style="list-style-type: none"> <li>• For Hospitalization cases, submission of original bills/receipts/related documents/reports are the necessary documents for submission of claims. However, If the members are holders of any Mediclaim policy, then the reimbursement under this scheme can be claimed for the differential amount, not settled by the insurance company, subject to production of necessary documents.</li> <li>• The reimbursement for hospitalization expenses including day care expenditure henceforth will be made excluding non-medical charges as annexed herewith.</li> </ul>
How to apply for membership	<ul style="list-style-type: none"> <li>• Retired employee who wish to become a member of the Scheme must apply online through their Union Parivar Mobile Application/Desktop application, as under. <b>(Path - Union Parivar &gt; Employee Self Service &gt; REMAS Membership application &gt; Add new value).</b></li> <li>• No physical applications from the retirees will be entertained.</li> <li>• In Union Parivar, the details of the retiree will be automatically displayed in the application form and the applicant must enter his/her account number and nominated branch code (IBR code). Any modification required in the editable field, can be modified by the applicant.</li> <li>• Spouse of the deceased Retiree, who doesn't have the rights to login to Union Parivar and who wish to join the Scheme shall submit the application as annexed herewith to the nominated Branch/Regional Office, who shall duly verify the same and apply on behalf of the spouse of the retiree.</li> <li>• Branch Manager/Deputy Branch Manager who is having the HR rights can also apply in Union Parivar, on behalf of the retired employee/spouse.</li> <li>• Submitted application will be available in the worklist of RO HR Official, who shall verify the details and recommend the application.</li> </ul>



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<u>SC. NO.9</u>	<u>UNION BANK OF INDIA RETIRED EMPLOYEES' MEDICAL ASSISTANCE SCHEME (UBIREMAS)</u>
PARTICULARS	DETAILS
	<ul style="list-style-type: none"> <li>• Recommended application now is available in the worklist of CO HR Officer and on successful debit of the membership fee, the application will be sanctioned and the membership number will be generated.</li> <li>• Once approved, the retiree can view the UBIREMAS membership number in Union Parivar, available at the top of the application page.</li> </ul>
<p>Process Flow for claiming reimbursement:</p>	<ul style="list-style-type: none"> <li>• Application Form for reimbursement of hospitalization expenses, as annexed herewith, along with all original documents to be submitted by the retiree to the Nominated Branch/Regional Office.</li> <li>• Nominated Branch to physically forward the documents to the Regional Office under whose jurisdiction it falls, after duly verifying the documents.</li> <li>• RO HR Administrator shall process the claim through path as mentioned hereunder, and submit the same to the competent authority viz., Regional Head/Deputy Regional Head not below the rank of Chief Manager, for sanction of the Claim.</li> </ul> <p><b>Workforce administration &gt; Staff welfare &gt;Health scheme &gt; REMAS claim Register</b></p> <ul style="list-style-type: none"> <li>• In case of the reimbursement claim being processed for the first time, the expenditure already incurred shall be feeded as 0.00 (zero amount).</li> <li>• HR Admin shall mandatorily verify the account number of the retired employee as submitted in the claim application through Finacle, to avoid non-credit/wrong credit of the reimbursement claim.</li> <li>• Union Parivar will not permit submission of Claims exceeding Rs. 0.50 Lakhs in a financial year or more than the ceiling i.e. Rs.1.50 lakh.</li> </ul>



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<u>SC. NO.9</u>	<u>UNION BANK OF INDIA RETIRED EMPLOYEES' MEDICAL ASSISTANCE SCHEME (UBIREMAS)</u>
PARTICULARS	DETAILS
	<ul style="list-style-type: none"> <li>• In case of consolidated claim of Rs. 1.50 Lakhs on death of the primary member during hospitalization, RO HR Administrator shall send a mail to our department at <a href="mailto:staffmedicclaim@unionbankofindia.bank">staffmedicclaim@unionbankofindia.bank</a>, for necessary modification in Union Parivar.</li> <li>• Once the application is sanctioned by the competent authority, the amount shall be directly credited to the account of the retiree, through auto credit process.</li> <li>• The application will then be available in the ID of CO officer-in-charge who will validate the same.</li> </ul>
General Conditions	<ul style="list-style-type: none"> <li>• The Retiree shall be the 'Primary member' and spouse shall be the 'Secondary member'.</li> <li>• Addition of 'Secondary member', if not done while applying for membership can be added subsequently, through request submitted to concerned Regional Office.</li> <li>• On death of retiree prior to attaining 60 years, the spouse can join the Scheme within 6 months of the retiree's age of 60 years.</li> <li>• On the death of the retired employee who is already a member, his/her spouse will continue to be covered under the scheme as 'Secondary member', for reimbursement of hospitalization expenses and annual health check-up.</li> </ul>

/ /



Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

<u>SC. NO.9</u>	<u>UNION BANK OF INDIA RETIRED EMPLOYEES' MEDICAL ASSISTANCE SCHEME (UBIREMAS)</u>
PARTICULARS	DETAILS
	<ul style="list-style-type: none"><li>Any such retiree who has exited the Bank for reasons other than 'Superannuation', VRS OR on Medical Incapacitation will not be eligible for membership and the benefits under the scheme.</li><li>The Branch where Savings Bank account of the "Family Unit" will be maintained for crediting reimbursement under the Scheme will be called "Nominated Branch".</li></ul>
Point of Contact	Any clarifications regarding the Scheme Guidelines/Operational issues, please contact on the 022-22896383 OR on Email ID <a href="mailto:staffmedicclaim@unionbankofindia.bank">staffmedicclaim@unionbankofindia.bank</a> .





Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

**LIST OF TREATMENT PERMISSIBLE IN DAY CARE  
(24 HOUR HOSPITALIZATION NOT REQUIRED)**

<b>SR</b>	<b>LIST OF TREATMENT</b>
1	ADENOIDECTOMY
2	APPENDECTOMY
3	ASCITIC/PLEURAL TAPPING
4	AUROPLASTY NOT COSMETIC IN NATURE
5	CORONARY/RENAL ANGIOGRAPHY
6	CORONARY ANGIOPLASTY
7	DENTAL SURGERY
8	D&C
9	EXCISION OF CYST/GRANULOMA/LUMP/TUMOR
10	EYE SURGERY
11	FRACTURE INCLUDING HAIRLINE FRACTURE/DISLOCATION
12	RADIOTHERAPY
13	CHEMOTHERAPY
14	LITHOTRIPSY
15	INCISION AND DRAINAGE OF ABSCESS
16	VARICOCELECTOMY
17	WOUND SUTURING
18	FESS
19	OPERATIONS/MICRO SURGICAL OPERATIONS ON THE NOSE, MOUTH, MIDDLE EAR/INTERNAL EAR, TONGUE, FACE, TONSILS & ADENOIDS, SALIVARY DUCTS, BREAST, SKIN & SUBCUTANEOUS TISSUES, DIGESTIVE TRACT, FEMALE/MALE SEXUAL ORGANS.
20	APPROVED TARGETED THERAPIES FOR TREATMENT OF CANCER IN DAY CARE AND ON STANDALONE BASIS. (IMMUNOTHERAPY — MONOCLONAL ANTIBODY CANCER TREATMENT ON STANDALONE BASIS).
21	HAEMO DIALYSIS
22	FISSURECTOMY/FISTULECTOMY
23	MASTOIDECTOMY
24	HYDROCELE SURGERIES
25	HYSTERECTOMY
26	INGUINAL/VENTRAL/MBILICALFIEMORAL HERNIA SURGERIES
27	PARENTERAL CHEMOTHERAPY
28	POLYPECTOMY
29	SEPTOPLASTY
30	PILES/FISTULA SURGERIES
31	PROSTATE SURGERIES
32	SINUSITIS SURGERIES
33	TONSILLECTOMY
34	LIVER ASPIRATION
35	SCLEROTHERAPY
36	VARICOSE VEIN LIGATION
37	ALL SCOPIES ALONG WITH BIOSPIES
38	LUMBAR PUNCTURE
39	TREATMENT FOR AGE RELATED MACULAR DEGENERATION (ARMD) AND INTRA VITREAL INJECTIONS FOR EYE DISORDERS OTHER THAN ARMD ALSO.



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

**LIST OF NON-MEDICAL EXPENSES EXCLUDED (NOT PAYABLE) UNDER UBIREMAS**

SN NO	LIST OF EXPENSES	REMARK
1	HAIR REMOVAL CREAM	Not Payable
2	BRUSH	Not Payable
3	COSY TOWEL	Not Payable
4	HAND WASH	Not Payable
5	MOISTURISER PASTE BRUSH	Not Payable
6	POWDER	Not Payable
7	RAZOR	Not Payable
8	SHOE COVER	Not Payable
9	BEAUTY SERVICES	Not Payable
10	BELTS/ BRACES	Not Payable.
11	BUDS	Not Payable
12	BARBER CHARGES	Not Payable
13	CAPS	Not Payable
14	COLD PACK/HOT PACK	Not Payable
15	CARRY BAGS	Not Payable
16	COMB	Not Payable
17	EAU-DE-COLOGNE / ROOM FRESHNERS	Not Payable
18	EYE PAD	Not Payable
19	EYE SHEILD	Not Payable
20	EMAIL / INTERNET CHARGES	Not Payable
21	FOOD CHARGES (OTHER THAN PATIENT'S DIET PROVIDED BY HOSPITAL)	Not Payable
22	FOOT COVER	Not Payable
23	GOWN	Not Payable
24	LEGGINGS	Not Payable
25	LAUNDRY CHARGES	Not Payable
26	MINERAL WATER	Not Payable
27	OIL CHARGES	Not Payable
28	SANITARY PAD	Not Payable
29	SLIPPERS	Not Payable
30	TELEPHONE CHARGES	Not Payable
31	TISSUE PAPER	Not Payable
32	TOOTH PASTE	Not Payable
33	TOOTH BRUSH	Not Payable
34	GUEST SERVICES	Not Payable
35	BED PAN	Not Payable
36	BED UNDER PAD CHARGES	Not Payable



**Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai**

**Annexure I**

SN NO	LIST OF EXPENSES	REMARK
37	CAMERA COVER	Not Payable
38	CLINIPLAST	Not Payable
39	CREPE BANDAGE	Not Payable
40	CURAPORE	Not Payable
41	DIAPER OF ANY TYPE	Not Payable
42	DVD, CD CHARGES	Not Payable
43	EYELET COLLAR	Not Payable
44	FACE MASK	Not Payable
45	FLEXI MASK	Not Payable
46	GAUSE SOFT	Not Payable
47	GAUZE	Not Payable
48	HAND HOLDER	Not Payable
49	HANSAPLAST/ADHESIVE BANDAGES	Not Payable
50	WEIGHT CONTROL PROGRAMS/ SUPPLIES/ SERVICES	Not Payable
51	COST OF SPECTACLES/ CONTACT LENSES/ HEARING AIDS ETC.,	Not Payable
52	DENTAL TREATMENT EXPENSES THAT DO NOT REQUIRE HOSPITALISATION	Not Payable
53	HORMONE REPLACEMENT THERAPY	Not Payable
54	HOME VISIT CHARGES	Not Payable
55	INFERTILITY/ SUBFERTILITY/ ASSISTED CONCEPTION PROCEDURE	Not Payable
56	OBESITY (INCLUDING MORBID OBESITY) TREATMENT IF EXCLUDED IN POLICY	Not Payable
57	PSYCHIATRIC & PSYCHOSOMATIC DISORDERS	Not Payable
58	CORRECTIVE SURGERY FOR REFRACTIVE ERROR	Not Payable
59	TREATMENT OF SEXUALLY TRANSMITTED DISEASES	Not Payable
60	DONOR SCREENING CHARGES	Not Payable
61	ADMISSION/REGISTRATION CHARGES	Not Payable
62	HOSPITALISATION FOR EVALUATION/ DIAGNOSTIC PURPOSE	Not Payable
63	EXPENSES FOR INVESTIGATION/ TREATMENT IRRELEVANT TO THE DISEASE FOR WHICH ADMITTED OR DIAGNOSED	Not Payable
64	ANY EXPENSES WHEN THE PATIENT IS DIAGNOSED WITH RETRO VIRUS + OR SUFFERING FROM /HIV/ AIDS ETC IS DETECTED/ DIRECTLY OR INDIRECTLY	Not Payable
65	STEM CELL IMPLANTATION/ SURGERY and storage	Not Payable
66	WARD AND THEATRE BOOKING CHARGES	Not Payable
67	ARTHROSCOPY & ENDOSCOPY INSTRUMENTS	Not Payable



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

**Annexure I**

SN NO	LIST OF EXPENSES	REMARK
68	MICROSCOPE COVER	Not Payable
69	SURGICAL BLADES, HARMONIC SCALPEL, SHAVER	Not Payable
70	SURGICAL DRILL	Not Payable
71	EYE KIT	Not Payable
72	EYE DRAPE	Not Payable
73	X-RAY FILM	Not Payable
74	SPUTUM CUP	Not Payable
75	BOYLES APPARATUS CHARGES	Not Payable
76	BLOOD GROUPING AND CROSS MATCHING OF DONORS SAMPLES	Not Payable
77	Antiseptic or disinfectant lotions	Not Payable
78	BAND AIDS, BANDAGES, STERILE INJECTIONS, NEEDLES, SYRINGES	Not Payable
79	COTTON	Not Payable
80	COTTON BANDAGE	Not Payable
81	MICROPORE/ SURGICAL TAPE	Not Payable
82	BLADE	Not Payable
83	APRON	Not Payable
84	TORNIQUET	Not Payable
85	ORTHOBUNDLE, GYNAEC BUNDLE	Not Payable
86	URINE CONTAINER	Not Payable
87	LUXURY TAX	Not Payable
88	HVAC	Not Payable
89	HOUSE KEEPING CHARGES	Not Payable
90	SERVICE CHARGES WHERE NURSING CHARGE ALSO CHARGED	Not Payable
91	TELEVISION & AIR CONDITIONER CHARGES	Not Payable
92	SURCHARGES	Not Payable
93	ATTENDANT CHARGES	Not Payable
94	IM IV INJECTION CHARGES	Not Payable
95	CLEAN SHEET	Not Payable
96	BLANKET/WARMER BLANKET	Not Payable
97	ADMISSION KIT	Not Payable
98	BLOOD RESERVATION CHARGES AND ANTE NATAL BOOKING CHARGES	Not Payable
99	CERTIFICATE CHARGES	Not Payable
100	COURIER CHARGES	Not Payable
101	CONVENYANCE CHARGES	Not Payable
102	DIABETIC CHART CHARGES	Not Payable
103	DOCUMENTATION CHARGES / ADMINISTRATIVE EXPENSES	Not Payable



**Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai**

**Annexure I**

SN NO	LIST OF EXPENSES	REMARK
104	DISCHARGE PROCEDURE CHARGES	Not Payable
105	DAILY CHART CHARGES	Not Payable
106	ENTRANCE PASS / VISITORS PASS CHARGES	Not Payable
107	EXPENSES RELATED TO PRESCRIPTION ON DISCHARGE	Not Payable
108	FILE OPENING CHARGES	Not Payable
109	INCIDENTAL EXPENSES / MISC. CHARGES (NOT EXPLAINED)	Not Payable
110	MEDICAL CERTIFICATE	Not Payable
111	MAINTENANCE CHARGES	Not Payable
112	MEDICAL RECORDS	Not Payable
113	PREPARATION CHARGES	Not Payable
114	PHOTOCOPIES CHARGES	Not Payable
115	PATIENT IDENTIFICATION BAND / NAME TAG	Not Payable
116	WASHING CHARGES	Not Payable
117	MEDICINE BOX	Not Payable
118	MORTUARY CHARGES	Payable up to 24 hrs, shifting charges not payable
119	MEDICO LEGAL CASE CHARGES (MLC CHARGES)	Not Payable
120	WALKING AIDS CHARGES	Not Payable
121	BIPAP MACHINE	Not Payable
122	COMMODE	Not Payable
123	CPAP/ CAPD EQUIPMENTS	Device not payable
124	INFUSION PUMP – COST	Device not payable
125	PULSEOXYMETER CHARGES	Device not payable
126	SPACER	Not Payable
127	SPIROMETRE	Device not payable
128	SP02 PROBE	Not Payable
129	NEBULIZER KIT	Not Payable
130	STEAM INHALER	Not Payable
131	ARMSLING	Not Payable
132	THERMOMETER	Not Payable
133	CERVICAL COLLAR	Not Payable
134	SPLINT	Not Payable
135	DIABETIC FOOT WEAR	Not Payable
136	KNEE BRACES ( LONG/ SHORT/ HINGED)	Not Payable
137	KNEE IMMOBILIZER/SHOULDER IMMOBILIZER	Not Payable
138	LUMBOSACRAL BELT	Payable for surgery
139	AMBULANCE CHARGES	Max Rs. 2,500/- per



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

**Annexure I**

SN NO	LIST OF EXPENSES	REMARK
140	AUTO/TAXI CHARGES	Max. Rs.750/- per
141	AMBULANCE COLLAR	Not Payable
142	AMBULANCE EQUIPMENT	Not Payable
143	VACCINATION CHARGES	Not Payable
144	MICROSHEILD	Not Payable
145	BETADINE / HYDROGEN PEROXIDE / SPIRIT / DISINFECTANTS ETC	Not Payable
146	PRIVATE NURSES CHARGES - SPECIAL NURSING CHARGES	Not Payable
147	NUTRITION PLANNING CHARGES - DIETICIAN CHARGESDIET CHARGES	Not Payable
148	AHD	Not Payable
149	ALCOHOL SWABES	Not Payable
150	SCRUB SOLUTION/STERILLIUM	Not Payable
151	AESTHETIC TREATMENT / SURGERY	Not Payable
152	TPA CHARGES	Not Payable
153	VISCO BELT CHARGES	Not Payable
154	ANY KIT WITH NO DETAILS MENTIONED [DELIVERY KIT, ORTHOKIT, RECOVERY KIT, ETC]	Not Payable
155	EXAMINATION GLOVES	Not payable
156	KIDNEY TRAY	Not Payable
157	MASK	Not Payable
158	OUNCE GLASS	Not Payable
159	OUTSTATION CONSULTANT'S/ SURGEON'S FEES	Not payable
160	OXYGEN MASK	Not Payable
161	PAPER GLOVES	Not Payable
162	REFERAL DOCTOR'S FEES	Not Payable
163	ACCU CHECK (Glucometry/ Strips)	Not Payable
164	PAN CAN	Not Payable
165	SOFNET	Not Payable
166	TROLLY COVER	Not Payable
167	UROMETER, URINE JUG	Not Payable
168	SOFTOVAC	Not Payable



Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

**APPLICATION FORM FOR REIMBURSEMENT OF HOSPITALIZATION EXPENSES & ANNUAL HEALTH CHECK-UP AMOUNT UNDER UNION BANK OF INDIA RETIRES EMPLOYEES' MEDICAL ASSISTANCE SCHEME (UBIREMAS)**

1	Name of The Primary Member with Employee/PF no.			
2	Name of Secondary Member (Spouse)			
3	UBIREMAS Membership No. of family unit under this scheme			
4	Nominated Branch			
5	Saving Bank Account Number			
6	Residential Address & Mobile No			
7	Reimbursement claimed for (Hospitalization or Annual Health Checkup)	<input type="checkbox"/>	Annual Health Check-Up	
		<input type="checkbox"/>	Hospitalization Expenses	
8	Expenses Incurred for whom, (Mention name and also mention whether Primary Member or Secondary Member)			
<b>Reimbursement of Annual health Check-Up</b>				
9.a	Nature of Health Check-Up (indicate the nature of test)			
b	Name of Diagnostic Centre Details of Bill for which reimbursement is sought for	Name		
		Bill No & Date		
		Amount		
c	Claim submitted for Financial Year			
d	Amount already Sanctioned for Health Check-up for Financial Year			
e	Amount of reimbursement requested			
<b>Reimbursement of Hospitalization Expenses</b>				
10.a	Name of Hospital and Duration of Hospitalization for which reimbursement is sought for	Name		
		Duration	From                      To	
		Bill No & Date		
		Amount		
b	Claim submitted for Financial Year			



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

**Annexure I**

<b>c</b>	Amount of Reimbursement towards hospitalization expenses already received so far under the scheme, if any, for the family unit, i.e., for self and spouse	
<b>d</b>	Whether holding any Mediclaim Policy in the name of self or spouse	
<b>e</b>	Amount of claim settled by the Insurance Company/TPA, (Enclose copy of the certificate/sanction letter of the Insurance Company)	
<b>f</b>	Balance amount not settled by the Insurance Company	
<b>g</b>	<b>Amount of Reimbursement Requested</b>	

*#The total reimbursement of hospitalization expenses including present bill should not exceed Rs.50,000/- in a financial year and maximum limit of Rs 1,50,000/- to the Family Unit, during the entire currency of membership under the scheme. The reimbursement of annual health check-up amount including present bill should not exceed Rs.2,000/- in a financial year.*

I certify the correctness of information given herein above. All Bills/Certificates/Vouchers/Cash Memos/documents in respect of expenses incurred as reported are enclosed.

I agree that the reimbursement will be as per UBIREMAS scheme guidelines.

Place:

Name & Signature of Primary/Secondary Member

**RECOMMENDED / DECLINED**

Recommended Rs. \_\_\_\_\_ to Shri / Smt. \_\_\_\_\_, Membership No. \_\_\_\_\_ under UBIREMAS which may be credit to his/her S.B. A/c. No. \_\_\_\_\_ with \_\_\_\_\_ Branch (Nominated Branch)

HR Administrator  
Regional Office,

**APPROVED / DECLINED**

Sanctioned Rs. \_\_\_\_\_ to Shri / Smt. \_\_\_\_\_, Membership No. \_\_\_\_\_ under UBIREMAS.

Regional Head/ Dy. Regional Head  
Regional Office



Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

**MEMBERSHIP FORM**  
(To be Submitted by Spouse of Deceased Retired Employee Only)

To,  
Asst. General Manager,  
Human Resource Department,  
Union Bank of India  
239, Vidhan Bhavan Marg  
Mumbai -400 021.

Passport Size Photo  
of to be affixed and  
attested by  
Nominated Branch

Dear Sir/Madam,

My Spouse retired on \_\_\_\_\_ and thereafter expired on \_\_\_\_\_  
prior to enrolling for **UBIREMAS** membership.

I desire to become a **Single** member of the Union Bank of India Retired Employees Medical Assistance Scheme (UBIREMAS) by paying non-refundable membership fees of Rs. \_\_\_\_\_ under the scheme.

I hereby authorize the bank to debit the membership fee from my account  
\_\_\_\_\_ (Enter 15 digit Account number).

I will ensure that sufficient balance is maintained in the above mentioned account.

The details are as under:

1. Employee ID -
2. Name of Employee -
3. Date of Birth -
4. Date of retirement from service -
5. Retired on superannuation or under VRS Scheme or voluntary retirement under OSR/Pension Scheme -
6. Designation at the time of Retirement from service (PPO Copy to be attached) -
7. Branch/Office last worked -
8. Date of Death of Employee (If employee already expired after retirement) -



**Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai**

**Annexure I**

Copy of Death Certificate to be enclosed

9. Name of the Spouse(Applicant) -
10. Date of Birth of Spouse(Applicant) -
11. Telephone No with STD Code -
12. Mobile No -
13. Email ID -
14. Address -
15. Saving Bank A/c No. -  
(15 digit Account no)
16. Nominated Branch of Union Bank of India -  
(Enter 6 digit Branch Code)
17. Past Major illness, if any -

**Declarations :**

- ✓ I hereby authorize the Bank to debit the membership fee as per the cadre of employee from my above mentioned account number. I will ensure that sufficient balance is maintained in the above mentioned account.
- ✓ I have read the scheme and the rules there under. I will abide by the rules made under.
- ✓ I am not gainfully employed.
- ✓ I hereby declare that information furnished above is true to the best of my knowledge and I shall give any other information as and when required by the bank.
- ✓ Kindly enrol me as member of the Union Bank of India Retired Employees Medical Assistance Scheme (UBIREMAS).

Place  
Date

Signature  
Name



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<u>SC. NO. 10</u>	<u>EX-GRATIA TO PRE-1986 EMPLOYEES</u>
PARTICULARS	DETAILS
Objective	The scheme provides Ex-Gratia to the employees retired prior to 01.01.1986 and were surviving as on 01.11.1997. Employee should have worked for 20 years.
Amount	Employees who have retired prior to 01/01/1986 and were surviving as on 01.11.1997, the amount of ex-gratia pension is Rs.10,000/- in each category in addition to the existing scheme of IBA.
Features of the Scheme	<p>1. Based on IBA letter dated 6/1/2014 the ex-gratia has been revised per month from 17/12/2013 as under:</p> <ul style="list-style-type: none"> <li>• Surviving pre-1986 retirees : Rs. 350 + DA</li> <li>• Surviving Spouses : Rs. 175 + DA</li> </ul> <p>2. Apart from the above ex-gratia an additional amount of ex-gratia of Rs 10,000/- per month shall be paid as under to the eligible retirees and their surviving spouses.</p>

A/B



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<u>SC. NO. 11</u>	<u>BANK'S HOLIDAY HOMES</u>
PARTICULARS	DETAILS
Objective	Bank Holiday Homes at different locations provide economical and hassle-free accommodation to the staff members visiting these places for rest and recuperation.
Eligibility	<ul style="list-style-type: none"> <li>• Bank's Holiday Home will be available for the use of permanent employees of the Bank and their families only.</li> <li>• Retired/voluntary retired employee, including those who have opted VRS under UBI VRS 2000-2001 scheme, will be eligible to avail of facility of Holiday Homes of the Bank during non-vacation/non-rush seasons.</li> </ul>
Booking Charges	A nominal compensation of Rs.200/- will be recovered from staff members.
Cancellation Charges	<ul style="list-style-type: none"> <li>• Cancellations can be made through Union Parivar. It is to be noted that any cancellation made at least 15 days prior to occupancy date will be eligible for refund till 31.03.2024 only. The procedure for bookings &amp; cancellation shall be as per existing procedure circulated vide staff circular no. 7767 dated 06.09.2022.</li> <li>• <b><u>Please note that w.e.f. 01.04.2024, in case of any cancellation, the holiday home booking amount will not be refunded.</u></b> Further, refunds will be made only in situations where the cancellations are made by the management on account of various operational issues like repair/renovation work/non-availability of Holiday Home etc. In such cases, the refund amount will be directly credited in the respective accounts of employees/retirees centrally.</li> </ul>
General Instructions	<ul style="list-style-type: none"> <li>• Application for reservation should be made on line through Union Parivar.</li> <li>• Employees can book maximum 1 room at Holiday homes located at Shirdi &amp; Matheran whereas at other places maximum 2 rooms may be booked.</li> <li>• The period of allotment/stay will not exceed two days for Holiday Home at Shirdi &amp; Matheran, whereas at other places, the period of allotment/ stay will not exceed four days.</li> <li>• Allotment letter will be issued online specifically stating the period of allotment through UNION PARIVAR to the concerned employee.</li> </ul>



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<u>SC. NO. 11</u>	<u>BANK'S HOLIDAY HOMES</u>
PARTICULARS	DETAILS
	<p>The employee concerned will carry with him/her the allotment letter and produce it before the caretaker/manager of the holiday home. The employee may produce the Identity Card to him by the Bank, if necessary.</p> <ul style="list-style-type: none"> <li>• The employee during the course of stay in the holiday home will be liable to pay for any damage to any item of property of the holiday home arising out of acts attributable to the employee.</li> <li>• The occupants should maintain full decorum throughout their period of stay in the Holiday Home. Occupants staying in the Bank's Holiday Homes will do so, at their own risk and the Management does not take any responsibility for any events whatsoever during the course of such stay.</li> <li>• All additions/deletions/modifications in status of Holiday Homes will be intimated through Staff Circulars from time to time.</li> </ul>
Booking Procedure	<ul style="list-style-type: none"> <li>• Staff members can apply for the booking of the holiday home through union Parivar (Desktop &amp; Mobile App) only, which will be approved/ confirmed by the Central Office on first cum first basis. No other mode of application will be accepted for the booking of holiday home.</li> <li>• A single holiday home can be booked by an individual employee only once in a Financial Year.</li> <li>• Once approved, employees are required to carry with them a print out of the allotment letter from their Union Parivar through Dekstop/Mobile App and produce the same before the caretaker /manager of the Holiday Home. No manual booking confirmation or allotment letters will be provided to employees.</li> <li>• The employee may be required to produce his/her identity card issued by the Bank, if necessary. Hence, all employees are advised to carry their identity card issued by the Bank.</li> <li>• No extension of stay will be permitted to any staff members beyond the period for which the holiday home is booked in Union Parivar.</li> </ul>
List of Holiday Homes	The list of Holiday Homes presently available to staff employees & their families are enclosed.

*[Handwritten Signature]*



Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

<b>LIST OF HOLIDAY HOMES</b>			
S N	Holiday Home	Address	Contact Phone Number
1	Manali	M/S Hotel Utsav, Near hotel Trishul Naggar Road Manali Distt KULLU MANALI, KULLU, HP	8252410001
2	Tirupathi	HOTEL KALYANI RESIDENCY, 177, TP AREA, TIRUPATI-517501	0877-2259780 /81/ 82 / 83
3	Tirumala	Sri Kanchi Mutt, SARVAMANALA MAHMANDAPAM, SRI KANCHI KAMAKOTO PEETHAM, RING ROAD Tirumala- 517504	0877-2277370
4	Shirdi	HOTEL MANDAI PALACE, J.T. SHELKE PATIL MARG, S R NO. 3 SHIRDI, -DIST-AHMEDNAGAR -423109	02423-255891, 255892
5	Puri	HOTEL SHAKUNTALA BEACH RESORTS (P) LTD SEA BEACH PURI	06752 221347/230823/8 763329599
6	Ooty	HOTEL SILVER OAK, 183/B/11, ETTINES ROAD, NEAR ALANKAR THEATRE OOTY CAMUND THE NILGIRIES 643001	0423- 2447148/2451747
7	Mathern	USHA ASCOT, PLOT NO 85 M.G. ROAD, OPP. MUNICIPAL COUNCIL, P.O. MATHERAN, TA- KARJAT, DISTRICT RAIGAD, MAHARASHTRA 410102	2269314422
8	Katra	IMPERIAL HOTEL, IMPERAIL HOTEL (A UNIT OF -ONE GUEST HOUSE), Railway Road, Near Saraswati Chowk, Katra, J&K -182301	09596237777, 09596000000
9	Haridwar	HOTEL HAR KI PAURI BHIMGODA-ROAD, HAR-KI- PAURI, HARIDWAR UTTARAKHAND 249401	(01334) 265553, 265554
10	Guruvayor	KRISHNA GARDENS (NANDANAM RESORTS), PERUMBILAVLI ROAD, NORTH NADA GURUVAYOOR 680101	7293930000 0487- 2552558
11	Goa (N)	BOSHAN HOTEL, OPP SHREE BODGESHWAR TEMPLE, MAPUSA-CALANGUTE ROAD MAPUSA BRDEZ GOA 403507	927/208-3001

A B



**Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai**

Annexure I

<b><u>LIST OF HOLIDAY HOMES</u></b>			
<b>S N</b>	<b>Holiday Home</b>	<b>Address</b>	<b>Contact Phone Number</b>
12	Coonor	Vijaya Deepa Guest House Door No:16/A1,Apple by Road,wellington ,Coonor The Nilgiris -643231	0423 -2200797/ 9489564797 / 8637645968
13	Mussorie	C/o Union bank of India,Landour BranchDEVONSHIRE HOUSEDEVONSHIRE ESTATE,LANDOUR,MUSSORIE	8928230700/ 8476806176
14	Ayodhya	R B S LAWN PARIKRAMA MARG,JANAURA, NEAR GOMTI HOSPITAL,NH-27 BYPASS,OPP SAI DATA KUTIYA AYODHYA - 402201	9838430000
15	Amritsar	HOTEL SHIRAZ CONTINENTAL,QUEENS ROAD,AMRITSAR- 143001	0183- 2565157,2220886 ,5098614
16	Alibaug	SAI INN RESORT REWAS ROAD, CHONDI,KHIM,REWAS ROAD,ALIBAG, MAHARASTRA 402201	8550957700
17	Bhubaneshwar	HOTEL PANTHANIWAS LEWIS ROAD BHUBNESHWAR 751014	7978903096/8260 282975
18	Ernakulum	HOTEL PRSIDENCY ,PARAMARA ROAD ERNAKULAM NORTH, KACHERIPADY, TOWN COCHINKERALA 682018	04842394040
19	Deoghar	HOTEL BHARATI JALSAR NEAR BAIDYANATH TEMPLE , DEOGHAR, JHARKHAND 814112	06432-354497 9431188628 / 8789016385
20	Varanasi	HOTEL SARIN INN 14 SIRA , MAHMOORGANJ, VARANASI 221010	933/692-9765
21	Goa(S)	Colva Residency, Colva Beach, Opp. Goa Tourism Bunglow, Goa (South)	0832- 2788047/048
22	Khandala	UNION BANK BUNGALOW PLOT NO 24, N .J. PARK SOCIETY KUNE GAON FIRST LEFT FRIM KALUBAI MANDIR ,NEXT TO LOKHANDWALA COMPLEX,VILLAGE KUNE	8308001536





**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

**Annexure I**

<u>SC. NO. 12</u>	<u>BANK'S TRANSIT QUARTERS</u>
PARTICULARS	DETAILS
Objective	Bank has transit quarters at Mumbai, Chennai, New Delhi and Kolkata to provide economical stay for staff members and their dependents when they visit these places for medical treatment.
Applicability	All active and retired staff members of all categories and their eligible dependents but not those appointed on contract or tenure/temporary basis can avail this facility.
Guidelines for allotment of Bank's Transit Quarters	<ul style="list-style-type: none"> <li>• The facility of Bank's Transit Quarter will be provided for maximum 15 days in a go and twice in a Financial Year in order to extend the benefit to maximum number of employees.</li> <li>• The facility of Bank's Transit Quarter will also be provided to retired employees for medical purposes depending upon the availability of Bank's Transit Quarters.</li> </ul>
Location of Transit Quarters	<p>The number of transit quarters as on date are as under:</p> <ol style="list-style-type: none"> <li>1. MUMBAI (CHINCHPOKLI)</li> <li>2. MUMBAI (WADALA)</li> <li>3. KOLKATA</li> <li>4. DELHI</li> <li>5. CHENNAI</li> </ol>
General Conditions	While availing the facility, the users should note that the employee will be responsible for any loss/damage caused to the furniture and fixtures in the quarters during their stay. The occupants should maintain discipline and decorum during the occupation of the quarters. This facility should be used by the employees only for undergoing medical treatment.
Details of Transit Quarters	Enclosed
Application Format for allotment of Transit Quarter	Enclosed

*(Handwritten initials)*

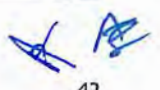


Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

**DETAILS OF THE TRANSIT QUARTERS**

TRANSIT QUARTER	<u>DETAILS</u>	
<b>MUMBAI (CHINCHPOKLI)</b>	<u>PARTICULARS</u>	<u>DETAILS</u>
	Address of the transit quarters	Flat No.51-A, 5 <sup>th</sup> floor, Soman Nagar Co-op Hsg. Society, Near Chinchpokli Railway Station, Chinchpokli, Mumbai - 400 012
	Nearest Railway Station	Mumbai Central - about 3 kms. Dadar - about 5 kms. Chinchpokli - adjacent to the quarters
	Local conveyance	By taxi, By local bus routes connecting all parts of Mumbai
	Charges	Rs.150/- for 15 days (Rs.10/- per day if less than 15 days)
	Procedure	<ul style="list-style-type: none"> <li>Apply to Chief Manager (HR), Human Resources Administration Division, HR Department, Central Office in prescribed format.</li> <li>After approval is accorded by the Competent Authority, Allotment Letter will be issued to the applicant. Keys of the quarters will be handed over to the applicant by Manager, Maintenance Sec., SSD, C.O. and the same will be returned to him on vacating the quarters. The employee will also possess his identity card during his stay at the quarters.</li> </ul>
<b>MUMBAI (WADALA)</b>	<u>PARTICULARS</u>	<u>DETAILS</u>
	Address of the transit quarters	Flat No.5 and 11, Vaibhav Apptt., Wadala East, Mumbai
	Nearest Railway Station	Wadala - about 1 km. Dadar - about 3 kms. Land mark- Barkat Ali Dargha
	Local conveyance	By taxi, By local bus routes connecting all parts of Mumbai





**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

TRANSIT QUARTER	<u>DETAILS</u>	
	Charges	Rs.150/- for 15 days (Rs.10/- per day if less than 15 days)
	Procedure	<ul style="list-style-type: none"> <li>Apply to Chief Manager (HR), Human Resources Administration Division, HR Department, Central Office in prescribed format.</li> <li>After approval is accorded by the Competent Authority, Allotment Letter will be issued to the applicant.</li> <li>Keys of the quarters will be handed over to the applicant by Manager, Maintenance Section, SSD, C.O. and the same will be returned to him on vacating the quarters. The employee will also possess his identity card during his stay at the quarters.</li> </ul>
KOLKATA	<u>PARTICULARS</u>	<u>DETAILS</u>
	Address of the transit quarters	Flat No.1 at Hazra, 41G, S.P. Mukherjee Road Kolkata - 700 026
	Nearest Railway Station	Netaji Bhavan (Metro Rail), Near Chitranjan Cancer Institute, Opp. to Jatin Das Park
	Local conveyance	By taxi By local bus routes connecting all parts of Kolkata
	Charges	Rs.150/- for 15 days (Rs.10/- per day if less than 15 days)
	Procedure	<ul style="list-style-type: none"> <li>Apply to Chief Manager, HR Department, Zonal Office Kolkata in prescribed format.</li> <li>After approval is accorded by the Competent Authority, Allotment Letter will be issued to the applicant.</li> <li>Keys of the quarters will be handed over to the applicant by Senior Manager (P&amp;D), Zonal Office Kolkata and the same will be returned to him on vacating the quarters.</li> <li>The employee will also possess his identity card during his stay at the quarters.</li> </ul>



Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

TRANSIT QUARTER	<u>DETAILS</u>	
DELHI	<u>PARTICULARS</u>	<u>DETAILS</u>
	Address of the transit quarters	Flat No.14, 2 <sup>nd</sup> floor, G-53, East of Kailash, New Delhi (Near ISKCON Temple).
	Nearest Railway Station	Hazarat Nizamuddin
	Local conveyance	By taxi By local bus routes connecting all parts of New Delhi
	Charges	Rs.150/- for 15 days (Rs.10/- per day if less than 15 days)
	Procedure	<ul style="list-style-type: none"> <li>• Apply to Chief Manager, HR Department, Zonal Office Delhi in prescribed format.</li> <li>• After approval is accorded by the Competent Authority, Allotment Letter will be issued to the applicant.</li> <li>• Keys of the quarters will be handed over to the applicant by Chief Manager, Kailash Colony Branch, New Delhi and the same will be returned to him on vacating the quarters.</li> <li>• The employee will also possess his identity card during his stay at the quarters.</li> </ul>
CHENNAI	<u>PARTICULARS</u>	<u>DETAILS</u>
	Address of the transit quarters	Kalpatharu Apartments, 93, Kumaran Colony Main Road, Vadapalani, Chennai-600 026, Tel.No.23620419
	Nearest Railway Station	Kodambakkam Rly. Stn. On the suburban railway Next to Vadapalani, Bus Terminus Next to Vijaya Hospital
	Local conveyance	By taxi By local bus routes connecting all parts of Chennai
	Charges	Rs.150/- for 15 days (Rs.10/- per day if less than 15 days)
	Procedure	<ul style="list-style-type: none"> <li>• Apply to Chief Manager, HR Department, Zonal Office Chennai as per format.</li> </ul>



**Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai**

**Annexure I**

TRANSIT QUARTER	<u>DETAILS</u>	
		<ul style="list-style-type: none"><li>• After approval is accorded by the Competent Authority, Allotment Letter will be issued to the applicant.</li><li>• Keys of the quarters will be handed over to the applicant by NRO Chennai and the same will be returned to them on vacating the quarters. The employee will also possess his identity card during his stay at the quarters.</li></ul>

*Handwritten initials/signature in blue ink.*



Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

**APPLICATION FORMAT FOR ALLOTMENT OF TRANSIT QUARTERS**

At:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Sir,

Kindly allot me Bank's Transit Quarters at \_\_\_\_\_. I furnish the following particulars:

Name of the employee : \_\_\_\_\_  
Emp. No. : \_\_\_\_\_  
Designation : \_\_\_\_\_  
Branch/Office Working at : \_\_\_\_\_  
Purpose of visit : \_\_\_\_\_  
Duration of visit : From \_\_\_\_\_ To \_\_\_\_\_  
(Not more than 15 days)

I have read the rules, governing allotment of Bank's transit quarters, at ----- enumerated in Staff Circular and I undertake to abide by the same. I further undertake to vacate the quarters at the end of the permitted period or as and when Bank requires me to do so. I authorize the Bank to recover charges for occupation and loss to furniture and fixtures, if any by debiting my S.B./ O.D. A/c. No: \_\_\_\_\_ with \_\_\_\_\_ Branch.

Thanking you,

Yours faithfully,

( )

Name:

Emp No.

**Note:** For active employees the application to be routed through proper channel and duly recommended by Branch Head/Department Head/In-Charge.



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<u>SC. NO. 13</u>	<u>FINANCIAL ASSISTANCE TO PHYSICALLY HANDICAPPED EMPLOYEES FOR PURCHASE OF CRUTCHES, OTHER ACCESSORIES</u>
PARTICULARS	DETAILS
Objective	<p>As per Government guidelines, persons with disabilities are recruited in the services of the Bank in tune with the Reservation Policy. Such employees need the support of the organization and therefore this scheme is evolved. The objective of the Scheme is to provide financial assistance to physically handicapped employees by way of reimbursement for:</p> <ul style="list-style-type: none"> <li>• Purchase of crutches/hearing aids/Braille Books/other accessories - artificial Legs / shoes, support for polio limbs etc.</li> <li>• Payment of fees for computer courses.</li> </ul>
Applicability	The Scheme will be applicable to all permanent employees of the Bank but not to those appointed on contract or tenure/temporary basis.
Amount	The employee is eligible for reimbursement of maximum Rs.5,000/- per year or the claim made whichever is less.
General Conditions	<ul style="list-style-type: none"> <li>• Application should be made on line through UNION PARIVAR.</li> <li>• <b>The same items can be purchased every year.</b></li> <li>• In case of reimbursement of fees for computer training, the applicant should submit course completion certificate within a period of 3 months from the date of completion of course.</li> <li>• The facility will be available once a year.</li> <li>• For claiming the amount under the Scheme, all eligible employees should ensure that their disability status is updated in Union Parivar.</li> <li>• If the disability status is not updated in Union Parivar, eligible employees should ensure up-dation of the same through HR Department of their respective Regional Offices on submission of requisite documents upto the satisfaction of the Sanctioning Authority.</li> </ul>
Competent Authority	<p>HR Suvidha. The application should be accompanied by verified copy of bill/receipt for the payment made for purchase crutches other accessories, payment of fees for computer training, cost of Braille books etc.</p> <p>While uploading the invoices/bills/documents in HRMS i.e. Union Parivar, all employees should ensure that requisite documents uploaded in HRMS i.e. Union Parivar should be 'Verified with Original' by the Dy. Branch Head/ Branch Head or the Departmental In-charge. Further, it should also</p>



Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

<u>SC. NO. 13</u>	<u>FINANCIAL ASSISTANCE TO PHYSICALLY HANDICAPPED EMPLOYEES FOR PURCHASE OF CRUTCHES, OTHER ACCESSORIES</u>
PARTICULARS	DETAILS
	be ensured that invoices/bills uploaded should clearly affix the remarks i.e. 'Verified with Original' (alongwith with mentioning the name, employee ID, designation & signature of Officer/Executive verifying the documents/bills/invoices).
Effective Date	The revised Scheme is effective from 01.04.2024. Hence, till 31.03.2024, the scheme, limits & Competent Authorities circulated vide Staff Circular no. 7749 dated 22.08.2022 shall remain effective.
Account No.	XXXXX8830005000





Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

<b><u>SCHEME NO. 14 - SCHEME FOR FINANCIAL ASSISTANCE TO PHYSICALLY CHALLENGED CHILDREN OF THE EMPLOYEES FOR PAYMENT OF SCHOOL/COMPUTER COURSES FEES, PURCHASE OF CRUTCHES, HEARING AIDS AND OTHER ACCESSORIES</u></b>	
PARTICULARS	DETAILS
Objective	<p>Employees having physically challenged children are required to incur heavy expenses to provide decent education and accessories like crutches, hearing aids etc. As a token of support to these employees, Bank has a scheme of Financial Assistance to physically challenged children of the employees for payment of school/computer courses fees, purchase of crutches, hearing aids and other accessories.</p> <p>The objective of the Scheme is to provide limited amount of financial support to the employees having physically challenged children by way of reimbursement of expenses incurred for the purpose of:</p> <ul style="list-style-type: none"> <li>• Payment of school fees/Computer course fees.</li> <li>• Purchase of crutches/ hearing aids/Braille books/ other accessories, artificial legs/shoes, support for polio limbs etc.</li> </ul>
Applicability	The scheme will be applicable to all permanent employees of the bank but not to those appointed on contract or tenure/temporary basis.
Amount	The amount of reimbursement has been increased to maximum Rs. 5000/- per year or the claim made whichever is less.
General Conditions	<ul style="list-style-type: none"> <li>• Application should be made on line through UNION PARIVAR.</li> <li>• Alongwith the application, employee should enclose verified copy of certificate issued by Competent Medical Authority evidencing disability of the child.</li> <li>• The application should be accompanied by verified copy of bill/receipt for the payment made for school/computer course fee and purchase of crutches/hearing aids/Braille Books/other accessories artificial legs/shoes, support for polio limbs etc.</li> <li>• When amount sanctioned is for equipment, same items can be purchased every year.</li> </ul>

*Handwritten signature/initials*



Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

<b><u>SCHEME NO. 14 - SCHEME FOR FINANCIAL ASSISTANCE TO PHYSICALLY CHALLENGED CHILDREN OF THE EMPLOYEES FOR PAYMENT OF SCHOOL/COMPUTER COURSES FEES, PURCHASE OF CRUTCHES, HEARING AIDS AND OTHER ACCESSORIES</u></b>	
PARTICULARS	DETAILS
Competent Authority	<p>HR Suvidha. The application should be accompanied by verified copy of bill/receipt etc.</p> <p>While uploading the invoices/bills/documents in HRMS i.e. Union Parivar, all employees should ensure that requisite documents uploaded in HRMS i.e. Union Parivar should be 'Verified with Original' by the Dy. Branch Head/ Branch Head or the Departmental In-charge. Further, it should also be ensured that invoices/bills uploaded should clearly affix the remarks i.e. 'Verified with Original' (alongwith with mentioning the name, employee ID, designation &amp; signature of Officer/Executive verifying the documents/bills/invoices).</p>
Effective Date	The revised Scheme is effective from 01.04.2024. Hence, till 31.03.2024, the scheme & limits circulated vide staff circular no. 7749 dated 22.08.2022 shall remain effective.
Account No.	XXXXXX8830024000





**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

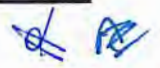
<b><u>SCHEME NO. 15 - SCHEME FOR PAYMENT OF EX-GRATIA AMOUNT FOR SETTLEMENT OF REMAINING OUTSTANDING AMOUNT IN THE STAFF LOAN ACCOUNTS (SHL/SVL) COVERED UNDER 'GROUP INSURANCE SCHEME FOR STAFF LOANS</u></b>	
PARTICULARS	DETAILS
Objective	<p>The Bank has in place Staff Loan Scheme (SHL/SVL) at concessional rate of interest for Award Staff and Officers, to support them. With the introduction of Group Insurance Scheme for all employees, the outstanding amount are being settled by the Insurer, in case of untimely demise of an employee. Further, it is observed that despite settlement from the insurer, the outstanding amount may remain on account of interest accrued, other charges etc. and the same is being settled by the bereaved family members, resulting in undue financial hardship to the surviving family members.</p> <p>The revised scheme aims to reduce the burden of the surviving family members of deceased staff member to a certain extent by way of granting ex-gratia from Staff Welfare Fund for adjustment of the unsettled outstanding amount in the SHL/SVL Accounts.</p>
Applicability	The scheme will be applicable to all permanent employees of the Bank but not to those appointed on contract or stipendiary basis.
Scope	<ul style="list-style-type: none"> <li>• The Scheme provides for adjustment of outstanding in the SHL/SVL account of deceased staff members.</li> <li>• Such employees whose staff loan accounts are covered under 'Group Insurance Scheme for staff loans' will only be eligible for providing financial assistance under the Scheme.</li> <li>• Loans availed by the employee under any other Scheme will not be covered under the ambit of this Scheme.</li> </ul>
Amount	<ul style="list-style-type: none"> <li>• Under the Scheme, staff loan accounts in which any outstanding amount remains unsettled even after settlement of dues by the Insurer will be settled. The payable amount under the Scheme shall be the outstanding amount, if any, under SHL/SVL Schemes at actual or Rs.2.00 lacs whichever is lower.</li> <li>• If the amount requested to be settled under the Scheme, is more than Rs.2.00 lacs, the same may be placed before the Staff Welfare Committee with requisite documents for deliberations and recommending for additional payments under the Scheme. The Staff Welfare Committee may/may not accede such requests subject to its satisfaction and availability of funds, on case to case basis.</li> </ul>



**Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai**

Annexure I

<b><u>SCHEME NO. 15 - SCHEME FOR PAYMENT OF EX-GRATIA AMOUNT FOR SETTLEMENT OF REMAINING OUTSTANDING AMOUNT IN THE STAFF LOAN ACCOUNTS (SHL/SVL) COVERED UNDER 'GROUP INSURANCE SCHEME FOR STAFF LOANS</u></b>	
PARTICULARS	DETAILS
General Conditions	<ul style="list-style-type: none"> <li>• An application in writing as prescribed under the scheme will be submitted by the nominee of the deceased employee to the Branch Manager/Chief Manager/Departmental Head where the employee was working.</li> <li>• The nominee to the Provident Fund/Gratuity Fund will be the nominee for the purpose of this scheme also.</li> <li>• Application will be scrutinized by the Branch Manager/Chief Manager/Departmental Head and it will be sanctioned by the Competent Authority.</li> <li>• After sanction of the application, the Branch/Office shall send the duly approved note to HRAD, CO on email id <a href="mailto:hrad@unionbankofindia.bank">hrad@unionbankofindia.bank</a>.</li> <li>• After receiving the duly sanctioned note along with the documents the same will be placed before Assistant General Manager (HR) for releasing amount payable under the Scheme.</li> <li>• Once approved, the relevant Staff Welfare Expenses account will be debited and the amount shall be credited in the Staff Housing Loan Account/SVL Account.</li> </ul>
Effective Date	The revised Scheme is effective from 01.04.2024. All employees who are having any pending claims under the Scheme as circulated vide staff circular no. 7749 dated 22.08.2022 are advised to submit their claims latest by 31.03.2024. In case of non-submission, the old claims will not be considered under the Scheme with effect from 01.04.2024.
Competent Authority	<p>The Competent Authorities for sanction of applications under the scheme are as under:</p> <ul style="list-style-type: none"> <li>• Branch Manager/Chief Manager of the branch in case of employees posted under branches including MLPs/RLPs/LC Branches/ MCBs/ NPCs etc.</li> <li>• Chief Manager (Operations) in case of employees posted under Regional Office/Field General Manager's Office.</li> <li>• Chief Manager (HR) in case of Central Office &amp; CO Annexes.</li> <li>• In charge of Office in case of Audit Office.</li> </ul>





Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

<b><u>SCHEME NO. 15 - SCHEME FOR PAYMENT OF EX-GRATIA AMOUNT FOR SETTLEMENT OF REMAINING OUTSTANDING AMOUNT IN THE STAFF LOAN ACCOUNTS (SHL/SVL) COVERED UNDER 'GROUP INSURANCE SCHEME FOR STAFF LOANS</u></b>	
<b>PARTICULARS</b>	<b>DETAILS</b>
	<ul style="list-style-type: none"><li>• ZLC Heads/ ULA Heads in case of employees posted under ZLCs/ ULAs.</li><li>• DGM/AGM in case of employees posted under Union Bank Knowledge Centre.</li></ul>
Enclosures	Application Format is enclosed.





Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

**APPLICATION FORMAT UNDER**  
**SCHEME FOR PAYMENT OF EX-GRATIA AMOUNT FOR SETTLEMENT OF REMAINING**  
**OUTSTANDING AMOUNT IN THE STAFF LOAN ACCOUNTS (SHL/SVL) COVERED UNDER**  
**'GROUP INSURANCE SCHEME FOR STAFF LOANS**

1. Name of the Deceased Employee :
2. Employee Number :
3. Designation :
4. Branch / Office (Name) :  
(Code No.)
5. Date of Death :  
(copy of Death Certificate duly attested to be enclosed)
6. Name of the Applicant :  
(who should be nominee for PF/Gratuity)
7. Nature of relationship to the Deceased Employee :
8. Branch where Housing Loan Account/ SVL A/c is maintained :
9. Amount outstanding in :

Staff Housing Loan		SHL settled by Insurer	Total Amount o/s.
Principal	Interest		
<b>SVL</b>			
Principal	Interest	Principal	Interest

10. Amount of Ex-gratia eligible :  
(Actual claim outstanding or Rs.2.00 lacs whichever is lower)  
If more than 2.00 lac, please specify reasons & forward the same to HRAD , CO



**Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai**

**Annexure I**

I apply for sanction of ex-gratia under the 'SCHEME FOR PAYMENT OF EX-GRATIA AMOUNT FOR SETTLEMENT OF REMAINING OUTSTANDING AMOUNT IN THE STAFF LOAN ACCOUNTS (SHL/SVL) COVERED UNDER 'GROUP INSURANCE SCHEME FOR STAFF LOANS'.

**DECLARATION**

I hereby declare that the information given in this form is true and correct to the best of my knowledge and belief. I will refund the amount to the Bank if it is proved that incorrect and false information was furnished by me. Please accord your sanction under the scheme.

Place : \_\_\_\_\_

Signature : \_\_\_\_\_

Date : \_\_\_\_\_

Name of the Nominee : \_\_\_\_\_

**PROCESSING AT BRANCH / OFFICE**

Certified that, we have verified the particulars given in the application and the documents submitted by above named Applicant. The applicant is eligible to receive ex-gratia under Staff Welfare Scheme - 'SCHEME FOR PAYMENT OF EX-GRATIA AMOUNT FOR SETTLEMENT OF REMAINING OUTSTANDING AMOUNT IN THE STAFF LOAN ACCOUNTS (SHL/SVL) COVERED UNDER 'GROUP INSURANCE SCHEME FOR STAFF LOANS'

**SANCTIONING AUTHORITY  
BRANCH/OFFICE**



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<b><u>SCHEME NO. 16 - HONORARIUM TO 'UNION YOUTH'</u></b>	
<b>PARTICULARS</b>	<b>DETAILS</b>
Objective	Many wards of the employees not only excel in the field of education but also in extracurricular activities like sports and culture. In the days of high cost of living the parents are forced to earmark a portion of their earning to nurture the intrinsic talents of their wards. Some of the wards excel in their discipline by achieving State, National and International recognition. If only there is financial support, these young Unions may achieve still better results in their chosen field. The Scheme aims to support such parents whose wards excel in sports and culture by extending financial assistance on the basis of results shown by the Young Unionites in their chosen fields, on a yearly basis.
Applicability	The scheme will be applicable to all permanent award staff and officer employees of our Bank but not to those appointed on contract or tenure/temporary basis. However, the scheme will not be applicable to the employees whose wards are not employed.
QUANTUM OF HONORARIUM	<ul style="list-style-type: none"> <li>• Rs.7500/- to those wards who have excelled in the State Level Competition.</li> <li>• Rs.15000/- to those wards who have excelled in National Level Competition.</li> <li>• Rs.25000/- for International Level Achievements.</li> </ul>
GENERAL CONDITIONS	<ul style="list-style-type: none"> <li>• The application should relate to the performance of the ward during a calendar year related to the current financial year.</li> <li>• Staff members are required to submit their applications through Union Parivar.</li> <li>• Further the Staff members should submit the documents in support of their claim alongwith the hard copy of the application.</li> <li>• In case of State/National level achievements, a certificate from the Federation concerned should be attached certifying that the association/organization was duly authorized by them to conduct the championship.</li> <li>• For applying in the field of Karate, they should note to submit a certificate issued by the respective State Association or the Department of Sports Affairs of the respective states duly certifying that the particular school of Karate Association is an accredited organization. Unless this certificate is submitted along with the application form, the claim will not be entertained.</li> <li>• The general conditions laid down in Staff Circular No.4781 dated 01/10/2001 will continue to be valid.</li> </ul>
Account no.	XXXXX8830014000



Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

**DECLARATION TO BE SUBMITTED BY THE EMPLOYEE APPLYING FOR GRANT OF  
“HONORARIUM TO UNION YOUTH”**

I hereby declare that my child is not employed and the information given is true and correct to the best of my knowledge and belief. I will refund the amount to the Bank if it is proved that incorrect and false information was furnished by me and I am also liable for disciplinary action.

Place:

Date:

Name of Employee:

Emp. No:

Signature:

.....  
**TO BE FILLED BY THE BRANCH/OFFICE**

We have attested the copies after verifying with the original certificates produced by the employee named above. We have also verified the application and the documents submitted. The applicant is eligible to receive the award under **Staff welfare scheme: “Honorary to Union Youth”**. We recommend sanction of the award as per extant rules.

Date	
Name of the Branch/Dept./Office	
Name of the Branch Manager/Dept. Head	
Power of Attorney No.	
Signature of Branch Manager/Dept. Head with seal	



Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

<b><u>SCHEME NO. 17 - 50% SUBSIDY ON IBA GROUP MEDICAL INSURANCE PREMIUM AMOUNT TO ALL RETIREES/ FAMILY PENSIONERS &amp; PRE-1986 RETIREES WHO ARE HAVING PENSION BELOW RS.20,000/- PER MONTH</u></b>	
PARTICULARS	DETAILS
Objective	<p>Our Bank, as a pro-active measure, has been extending a helping hand to the retirees, by bearing 50% amount of the yearly IBA Group Medical Insurance premium (without domiciliary coverage), in respect of:</p> <ul style="list-style-type: none"> <li>• All Retirees who are being paid pension of less than Rs.20,000/- per month.</li> <li>• Family pensioners who are being paid pension of less than Rs.20,000/- per month.</li> <li>• Pre-1986 retirees who are being paid pension of less than Rs.20,000/- per month.</li> </ul>
Eligibility	50% amount of the yearly Insurance premium on the base policy (without domiciliary coverage), to all retirees, family pensions, pre-1986 retirees who opted for IBA Group Medical Insurance Policy and being paid a pension below Rs.20,000/- per month.
Mode of Payment of subsidy	Subsidy amount shall be credited to retirees account maintained with our Bank.
Competent Authority	The delegated authority for approving expenditure under the scheme shall be Assistant General Manager (EBD).
Effective Date	The revised scheme will be effective from the IBA policy period 2023-24.

*(Handwritten signature)*



Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

<b><u>SCHEME NO. 18 - SCHEME FOR GRANT OF FUNERAL EXPENSES IN THE EVENT OF DEMISE OF IN-SERVICE EMPLOYEE</u></b>	
<b>PARTICULARS</b>	<b>DETAILS</b>
Objective	<p>The event of demise of an employee during service is devastating for the family. The untimely demise also causes financial hardships for the family. In order to provide immediate financial assistance to the family in these moments of grief, Bank has introduced a new scheme of 'Grant of Funeral Expenses' under staff welfare.</p> <p>The objective of the Scheme is to provide immediate financial assistance to the aggrieved family members of the deceased active employee, to help in last rituals.</p>
Applicability	The scheme will be applicable to all permanent active award staff and officer employees of our Bank but not to those appointed on contract or tenure/temporary basis.
Quantum of Financial Assistance	The quantum of financial assistance shall be Rs. 10,000/- and shall be provided to the family members of the employee.
Nomination	Funds will be credited in the account of the nominee of the employee as per the nomination made in Union Parivar in the relevant module.
Procedure for Payment	It will be the responsibility of the HR Department of Zonal Office/RO/CO (as the case may be) to immediately process and place the matter to the respective Competent Authority for the approval after getting information regarding the demise of an employee posted under their jurisdiction in the format attached. After approval, amount should be credited by the concerned Zonal Office/RO/CO in the account of the nominee of the employee, as per the nomination given by the employee in Union Parivar for the purpose, by debiting 'POB Inter Branch Account' (A/C No. XXXXX8030046500). The POB should be raised on HR Department, Central Office (Sol ID-80010, IBR Code-580015). The concerned HR department should forward copy of the sanctioned process note to mail id <a href="mailto:hrad@unionbankofindia.bank">hrad@unionbankofindia.bank</a> for claiming reimbursement alongwith POB claim. The concerned HR Department at Zonal Office/RO/CO should maintain the records of sanction/payment alongwith death certificate of the employee, for audit purposed.

*Handwritten initials/signature*



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<b>SCHEME NO. 18 - SCHEME FOR GRANT OF FUNERAL EXPENSES IN THE EVENT OF DEMISE OF IN-SERVICE EMPLOYEE</b>			
PARTICULARS	DETAILS		
	It should be ensured that timely assistance has been extended to the aggrieved family of the employee without waiting for the claim/request. Supporting documents like death certificate to be obtained afterwards.		
Competent Authority for sanction	Posting location of employee	Process owner	Competent Authority
	Employees working at all types of Branches/ Offices including RLPs/ LC Branches/ MCBs/ USKs/ MSME Loan points/ NPCs/ RAOs etc.	HR department of Regional Office	Regional Head
	Employees working at all administrative offices including ZLC/ULA, UBKC (except Central Office)	HR department of Regional Office	Regional Head within whose jurisdiction concerned ZLC/ULA/ UBKC administrative offices falls.
	Employees upto Scale IV, working at Central Office & CO Annex	HRAD Central Office	Asst. General Manager (HR) / Deputy General Manager (HR) at Central Office
	Regional Heads	HR department of Zonal Office	Zonal Head
	Zonal Head / General Manager / Chief General Manager	HRAD Central Office	General Manager (HR) / Chief General Manager (HR)





Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

<b><u>SCHEME NO. 18 - SCHEME FOR GRANT OF FUNERAL EXPENSES IN THE EVENT OF DEMISE OF IN-SERVICE EMPLOYEE</u></b>			
<b>PARTICULARS</b>	<b>DETAILS</b>		
	<table border="1"><tr><td>Employees on deputation</td><td>The applications shall be processed and sanctioned by the Concerned Office/Competent Authority as mentioned above depending upon the place of posting of the employee in the Biodata (Union Parivar).</td></tr></table>	Employees on deputation	The applications shall be processed and sanctioned by the Concerned Office/Competent Authority as mentioned above depending upon the place of posting of the employee in the Biodata (Union Parivar).
Employees on deputation	The applications shall be processed and sanctioned by the Concerned Office/Competent Authority as mentioned above depending upon the place of posting of the employee in the Biodata (Union Parivar).		
Enclosure	Format of Process Note is enclosed.		





Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

<b>SCHEME NO. 19 - 'GRANT OF FINANCIAL AID TO THE BEREAVED FAMILY MEMBER ON DEMISE OF AN EMPLOYEE IN SERVICE'</b>	
PARTICULARS	DETAILS
Objective	The event of demise of an employee during service is devastating for the family. The untimely demise also causes financial hardships for the family. In order to provide immediate financial assistance to the family in these moments of grief, Bank has introduced a new scheme of 'Grant of Financial Aid to The Bereaved Family Member on Demise of An Employee In Service' under staff welfare.
Applicability	The Scheme is applicable to all the permanent employees of the Bank. Employees on contract/ casual nature/temporary are not covered under the Scheme. However, the employees on Loss of Pay/Sabbatical Leave are also covered under the Scheme.
Quantum of Financial Assistance	Under the scheme financial assistance of Rs.50, 000/- to be provided to the family members of the deceased employee.
Nomination	Funds will be credited in the account of the nominee of the employee as per the nomination made in Union Parivar in the relevant module.
Procedure for Payment	<p>It will be the responsibility of the HR Department of Zonal Office/RO/CO (as the case may be) to immediately process and place the matter to the respective Competent Authority for the approval after getting information regarding the demise of an employee posted under their jurisdiction in the format attached. After approval, amount should be credited by the concerned Zonal Office/RO/CO in the account of the nominee of the employee, as per the nomination given by the employee in Union Parivar for the purpose, by debiting 'POB Inter Branch Account' (A/C No. XXXXX8030046500). The POB should be raised on HR Department, Central Office (Sol ID-80010, IBR Code-580015). The concerned HR department should forward copy of the sanctioned process note to mail id <a href="mailto:hrad@unionbankofindia.bank">hrad@unionbankofindia.bank</a> for claiming reimbursement alongwith POB claim. The concerned HR Department at Zonal Office/RO/CO should maintain the records of sanction/payment alongwith death certificate of the employee, for audit purposed.</p> <p>It should be ensured that timely assistance has been extended to the aggrieved family of the employee without waiting for the claim/request. Supporting documents like death certificate to be obtained afterwards.</p>





**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<b>SCHEME NO. 19 - 'GRANT OF FINANCIAL AID TO THE BEREAVED FAMILY MEMBER ON DEMISE OF AN EMPLOYEE IN SERVICE'</b>			
<b>PARTICULARS</b>	<b>DETAILS</b>		
Competent Authority for sanction	<b>Posting location of employee</b>	<b>Process owner</b>	<b>Competent Authority</b>
	Employees working at all types of Branches/ Offices including RLPs/ LC Branches/ MCBs/ USKs/ MSME Loan points/ NPCs/ RAOs etc.	HR department of Regional Office	Regional Head
	Employees working at all administrative offices including ZLC/ULA, UBKC (except Central Office)	HR department of Regional Office	Regional Head within whose jurisdiction concerned ZLC/ULA/ UBKC administrative offices falls.
	Employees upto Scale IV, working at Central Office & CO Annex	HRAD Central Office	Asst. General Manager (HR) / Deputy General Manager (HR) at Central Office
	Regional Heads	HR department of Zonal Office	Zonal Head
	Zonal Head / General Manager / Chief General Manager	HRAD Central Office	General Manager (HR) / Chief General Manager (HR)
	Employees on deputation	The applications shall be processed and sanctioned by the Concerned Office/Competent Authority as mentioned above depending upon the place of posting of the employee in the Biodata (Union Parivar).	
Enclosure	Format of Process Note is enclosed.		

✍️



**Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai**

Annexure I

**Format of Process note for  
'Grant of financial aid to the bereaved family member  
on sad demise of an Employee in Service'**

ॐ

**'Grant of Funeral Expenses' in the event of demise of in service Employee  
(For Approval)**

Bank is having scheme of 'Grant of financial aid to the bereaved family member on sad demise of an employee in service/ Grant of Funeral Expenses' under Staff Welfare to provide financial assistance to the aggrieved family members of the deceased employee in service. The scheme is applicable to all the permanent employees of the Bank.

We are in receipt of information that our staff Mr./Ms. \_\_\_\_\_, Emp. number \_\_\_\_\_, posted at \_\_\_\_\_ branch/office expired on \_\_\_\_\_. As per the scheme, his/her family is eligible for the scheme for 'Grant of financial aid to the bereaved family member on sad demise of an Employee in Service' / 'Grant of Funeral Expenses'.

Mr./Ms. \_\_\_\_\_ has nominated Mr./Ms. \_\_\_\_\_ as his/her nominee for 'Grant of financial aid to the bereaved family member on sad demise of an Employee in Service/ Grant of Funeral Expenses' in Union Parivar. Copy of the nomination page of Union Parivar is attached with the note. We have collected account details of the nominee for payment under the Scheme, which is as under:

Name of the Nominee	Relation with employee	Account details*

\*RTGS/NEFT details will also be required if account is with other Bank.

In view of the above, it is recommended to release Rs.50,000/- (Rs. Fifty Thousand Only) as 'Grant of financial aid to the bereaved family member on sad demise of an Employee in Service' and Rs.10,000/- (Rs. Ten Thousand) as 'Grant of Funeral Expenses' to the aforesaid nominee of Mr./Ms. \_\_\_\_\_ by raising POB to HR Department, Central Office.

Recommended for approval.

**Approved / Declined  
(Sanctioning Authority)**

**NOTE: Details of POB raised also to be shared in below mentioned format:**

Date of PoB	Transaction no.	Date of payment	Amount	Sol ID.



**Human Resources Administrative Division**  
**Human Resources Department, Central Office, Mumbai**

Annexure I

<b>SCHEME NO. 20 - REIMBURSEMENT FOR PURCHASE OF SPECTACLES</b>									
<b>PARTICULARS</b>	<b>DETAILS</b>								
Objective	To provide financial assistance to the employees above 35 years of age in purchasing and replacement of spectacles/ glasses/frames/contact lens on production of bills and eye-card enabling them to perform the day to day official duties with ease.								
Eligibility	All permanent Award Staff and Officer above the age of 35 years but not to those appointed on contract or tenure/temporary basis are eligible under the Scheme. The eligible amount can be claimed once in 2 years from the date of its previous sanction.								
Reimbursement amount	<p>The age wise reimbursement amount is as under:</p> <table border="1" style="margin-left: auto; margin-right: auto; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Age Group</th> <th style="width: 50%;">Eligibility</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">35 &amp; upto 40</td> <td style="text-align: center;">Rs.2000/-</td> </tr> <tr> <td style="text-align: center;">Above 40 upto 50</td> <td style="text-align: center;">Rs.2500/-</td> </tr> <tr> <td style="text-align: center;">Above 50 upto 60</td> <td style="text-align: center;">Rs.3000/-</td> </tr> </tbody> </table>	Age Group	Eligibility	35 & upto 40	Rs.2000/-	Above 40 upto 50	Rs.2500/-	Above 50 upto 60	Rs.3000/-
Age Group	Eligibility								
35 & upto 40	Rs.2000/-								
Above 40 upto 50	Rs.2500/-								
Above 50 upto 60	Rs.3000/-								
Application	<ul style="list-style-type: none"> <li>The claim for reimbursement shall be applied only in the relevant module by uploading the verified copy of bills/ invoice along with the eye-card or Ophthalmologist's prescription. However, Visually Impaired employees can purchase goggles, if required, within their age-wise eligibility and claim the reimbursement by uploading the bills.</li> <li>While uploading the invoices/bills in HRMS all employees should ensure that documents/ invoice/bills uploaded in HRMS i.e. Union Parivar should be 'Verified with Original' by the Dy. Branch Head/ Branch Head or the Departmental In-charge. Further, it should also be ensured that documents/invoices/bills uploaded should clearly affix the remarks i.e. 'Verified with Original' (alongwith with mentioning the name, employee ID, designation &amp; signature of Officer/Executive verifying invoices/bills).</li> <li>Only a single claim for reimbursement shall be considered and no piecemeal claims shall be entertained.</li> </ul>								
Processing and payment	The eligible amount or the actual amount of bill whichever is less shall be auto credited after approval by HR Suvidha.								
Account No.	XXXXX883004000								

A/B



Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

<b><u>SCHEME NO. 21 - SUBSIDY FOR INSURANCE PREMIUM AMOUNT PAID BY THE RETIREES UNDER IBA GROUP MEDICAL SCHEME HAVING PENSION Rs.20,000/- &amp; ABOVE (P.M.)</u></b>	
<b>PARTICULARS</b>	<b>DETAILS</b>
Objective	To subsidize the insurance premium amount paid by the retirees under Group Medical Insurance Scheme of IBA by the pensioners/family pensioners drawing pension Rs. 20,000/ per month & above.
Eligibility	<ul style="list-style-type: none"> <li>All pensioners/family pensioners drawing pension more than Rs. 20,000/ per month and are paying the insurance premium amount under the Group Medical Insurance Scheme of IBA are covered under the Scheme.</li> <li>Under the Scheme, subsidy to all retirees who are drawing pension of Rs.20,000/- &amp; ABOVE (P.M.) and covered under 'IBA GROUP MEDICAL INSURANCE SCHEME will be distributed proportionately.</li> </ul>
% of Subsidy provided under Scheme	The % of subsidy provided will depend upon the amount of fund allocated under the Scheme during a FY as per the recommendations of the Staff Welfare Committee.
Mode of Payment	The amount of subsidy will be provided in the respective pension account of the retirees.
Competent Authority	General Manager (HR) is the Competent Authority for releasing payments and for approving the actual amount of subsidy & expenditure under the Scheme.

*(Handwritten signature)*



Human Resources Administrative Division  
Human Resources Department, Central Office, Mumbai

Annexure I

<b><u>SCHEME NO. 22 - SUBSIDY FOR INSURANCE PREMIUM AMOUNT PAID BY THE EMPLOYEES UNDER GROUP INSURANCE SCHEME FOR STAFF LOANS</u></b>	
PARTICULARS	DETAILS
Objective	To reduce the financial burden on the employees and subsidize the insurance premium amount paid by the employees under Group Insurance Scheme for staff loans as a welfare measure.
Eligibility	Insurance Premium amount paid by the employees for the Staff loan account (SHL/SVL/SOD) covered under Group Insurance Scheme for staff loans are covered under this Scheme.
% of Subsidy provided under Scheme	The % of subsidy provided will depend upon the amount of fund allocated under the Scheme during a FY as per the recommendations of the Staff Welfare Committee.
Mode of Payment	The amount of subsidy will be provided in the respective staff loan account of employees.
Competent Authority	General Manager (HR) is the Competent Authority for releasing payments and for approving the actual amount of subsidy & expenditure under the Scheme.

