

Procedure for Renewal / Membership for SBI Health Assist (Policy 'B') through offline mode

a) Procedure to be followed by Various categories of applicants :

- I. All eligible retirees/ spouses of retirees who are not member of expiring SBI Health Assist Policy (2023-24) will fill up the Application Form (enclosed as Annexure - I) and submit to the pension paying branch along with cheque/ debit authority for applicable premium amount as per premium chart.
- II. Existing members of SBI Health Assist (2023-24) willing to renew their policy will fill up the simplified Consent Form (enclosed as Annexure - IV) and will submit to the pension paying branch along with cheque/ debit authority for applicable premium amount as per premium chart.
- III. New retirees who will retire on or after 16.01.2024 and willing to enroll for the policy, will also be required to fill up the Application Form (enclosed as Annexure-III) and submit to the pension paying branch along with cheque/ debit authority for applicable pro-rata premium amount as per premium chart. Branches can contact CM (HR) at their respective A.O. to obtain exact pro-rata premium applicable to the new retiree. The Pro-rata calculator will be shared with all CMs (HR).
- IV. The branch will arrange for debiting the applicant's account with the amount of gross premium (i.e. Basic Premium plus GST) and credit the same to Current Account opened by each A.O. for collection of premium.
- V. Once the Branch has credited the premium to the Current Account opened by respective A.O., branch will not debit/ reverse the premium from collection account of A.O. without approval of CM-HR of concern AO.
- VI. Retirees of e-ABs should mention their HRMS ID instead of their Associate Bank's PF ID on the Application Form in column no. 1A.
- VII. Retirees of e-ABs who do not have HRMS ID should mention the name of the e-AB (SBM, SBT, SBBJ, SBP, SBIN, SBS & SBH) before their PF ID (for example if PF ID of a retiree of SBM is 1234 then "SBM1234" is to be mentioned) in column no. 1B.
- VIII. Once amount of premium is credited in the designated account at the A.O., branch will forward duly filled-in application forms [mentioning (a) Transaction No. (b) Date of Transaction; and (c) Amount] to the concerned A.O. for further action.
- IX. AOs on receiving the application form, will verify the application/ consent forms and check the eligibility of the applicant, eligible family members, ensure that

all necessary details have been filled and correct amount of premium has been deposited in the Current Account maintained at A.O.

- X. AOs will simultaneously prepare a list (as per Annexure -VI) containing details of the applicants and send the soft copy through email to HR Department at their respective LHO and also transfer the consolidated amount to Main Collection Account maintained by P & PM department, Corporate Centre, Mumbai. Specific dates for transfer of consolidated premium to Corporate Centre and data file sharing will be communicated by Corporate Centre to the LHOs / A.Os.
- XI. The AOs should ensure that the amount remitted to Corporate Centre tallies with the column total of 'Premium Paid by pensioners' in the excel file sent by them to their respective LHO. AOs should not send data files directly to Corporate Centre.
- XII. HR Department at each LHO, on receiving the enrolment details / files from the AOs will verify and collate the details in a single excel file in different sheets (as per Annexure-VI) for each AOs and send the same to P & PM Department, Corporate Centre on the dates communicated to them.
- XIII. P& PM Department, Corporate Centre, on receiving the files from each LHO, will prepare a consolidated list and send the same to the Insurance Company along with the total premium amount including GST.