

**HUMAN RESOURCE DEVELOPMENT OFFICE, UP DILIMAN**

**REQUIRED CHECKLIST FOR SUBMISSION  
PAYMENT FOR SEPARATION / RETIREMENT BENEFITS**

**Requirements for GSIS Endorsement**

- \_\_\_\_\_ Application for Retirement under RA660, RA1616, PD1146, & RA8291 /  
Separation w/ affixed signature of chosen Retirement Options & affixed signature as applicant.
- \_\_\_\_\_ Application for Life Insurance Benefit for cash surrender value w/ affixed signature as applicant.
- \_\_\_\_\_ GSIS Insurance Policy / Certificate of Membership Policy

**Requirements for TERMINAL LEAVE (TL) / FACULTY SICK LEAVE (FSL) / eSERVICE RECOGNITION PAY (SRP)**

- \_\_\_\_\_ Letter of Intent to Retire (applicable for early, optional and compulsory retirement only) /  
Letter of Approved Resignation (applicable for resigned employees only)
  - \_\_\_\_\_ Terminal Leave Application w/ your affixed signature and approved signature of your unit Dean/Director
  - \_\_\_\_\_ **LATEST** Notice of Salary Adjustment (NOSA) / Notice of Salary Increment (NOSI) /  
approved last appointment indicating the last salary received before separation from the University  
(Submit 5 photocopies for TL. Submit 3 photocopies for eSRP / FSL)
  - \_\_\_\_\_ **LATEST** Sworn Statement of Assets & Liabilities.  
(SALN that was submitted BEFORE the effective year of separation from the University)  
(Submit 3 photocopies for TL. Submit 3 photocopies for eSRP / FSL)
  - \_\_\_\_\_ University Clearance with complete attachments of certification from different units  
(University Clearance must be **ACCOMPLISHED THREE (3) ORIGINAL SIGNED COPIES**)  
(Submit original copy with 5 complete photocopies for TL & 3 photocopies for eSRP / FSL)
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- \_\_\_\_\_ Marriage Contract (for married female retiree) or Certificate of No Marriage (for single female retiree)  
(Submit original NSO/PSA certificate copy with 5 photocopies for TL)
  - \_\_\_\_\_ FOR LATE TL CLAIMS, a letter addressed to DBM / UP is required explaining the reason for the  
delayed submission of terminal leave application. (Submit original letter with 5 photocopies)  
DBM – Ms. Ruby Esteban, Regional Director – NCR, Dept. of Budget & Management,  
Malacañang Palace, Manila.  
UP - The Chancellor, Office of the Chancellor – for UP Diliman Employees  
Vice Pres. for Administration, Office of the Vice Pres. for Adm. – for UP System Employees
  - \_\_\_\_\_ GSIS Retirement Voucher Clearance (Submit 4 photocopies of all pages voucher for TL)  
(NOTE: This voucher will be mailed to your residence address via registered mail from GSIS)
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- \_\_\_\_\_ Birth Certificate (Submit 2 photocopies of NSO/PSA Birth Certificate)
  - \_\_\_\_\_ Identification Cards (Submit 2 photocopies of 2 Valid IDs – back to back with affixed specimen signature  
e.g. UP Employees ID, GSIS uMID Card, Driver's License ID, passport or Senior Citizen's ID)
  - \_\_\_\_\_ Recent pictures (Submit 2 copies of 1x1 pictures for Philhealth / HRDO 201 records;  
Submit 2 copies of 2x2 pictures for UP Retirees ID application)
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### **ADDITIONAL REMINDERS**

- \_\_\_\_\_ U.P. PROVIDENT FUND, INC. BENEFIT CLAIMS (UPPFI Form No. 03-A) for members only  
Submit Service Record indicating the effective date of separation; complete University Clearance w/ attachments & Certificate of Clearance issued by HRDO; Photocopy of Valid Identification Card  
Submit your application form **PERSONALLY** to the Office of the UP Provident Fund  
one week before your retirement date
  
- \_\_\_\_\_ PAG-IBIG FUND Application for Provident Benefits (APB) CLAIMS  
Submit your application with SR, NSO/PSA Birth Certificate or GSIS Retirement Voucher Clearance and a photocopy of 2 valid IDs **PERSONALLY** to PAG-IBIG office after your retirement date.
  
- \_\_\_\_\_ PhilHealth Member Registration Form (PMRF)  
Submit your application with SR, GSIS Retirement Voucher Clearance, and 2 photocopies of valid IDs to HRDO. **The liaison officer of HRDO will endorse your application to PhilHealth office.**
  
- \_\_\_\_\_ *For Gawad Parangal para sa Retirado at Gawad Paglilingkod presentation*  
Please provide pictures for powerpoint presentation, e.g. pictures of solo portrait, group pictures, family pictures, pictures with friends / officemates, college graduation pictures, etc.  
HRDO can scan your original photos. You can also email the scanned pictures to Rea at [nareaxmolina@yahoo.com](mailto:nareaxmolina@yahoo.com) or [nareaxmolina@gmail.com](mailto:nareaxmolina@gmail.com)

For follow up of claims:

Benefits Section: UPVoiP 9818500 local 2573, 2565, 2575 (REA MOLINA)

Diliman Accounting Office: local 2759, 2755; System Accounting Office: local 4254, 4253

Diliman Budget Office: local 3019; System Budget Office: local 3026

Diliman Cash Office: local 2763, 2651; System Cash Office: local 2538, 2539

Department of Budget and Management: Tel: 734-8038, 734-8035

Pag-Ibig Fund [www.pagibigfund.gov.ph](http://www.pagibigfund.gov.ph) Tel: 7244244, 9291854, 4269528; or 4223000 loc. 5665

UP Provident Fund, Inc. Tel: 929-3601, 929-3623, 981-8500 loc 4587

UP Credit Cooperative Tel: 435-0356; 924-8002

PhilHealth Call Center [www.philhealth.gov.ph](http://www.philhealth.gov.ph) Tel: 441-74-42

Government Service Insurance System [www.gsis.gov.ph](http://www.gsis.gov.ph)  
QC Branch, 746 Geronimo Bldg., Mindanao Ave., Tandang Sora, QC.  
Call Center Agents: Tel no. 847-47-47  
Globe Toll Free Number: 1-800-8-847-4747  
PLDT/Smart Toll Free Number: 1-800-10-847-4747



## Requirements for Designation of Next of Kin, issued by the University

DEATH CERTIFICATE issued by the Local Civil Registrar (LCR) of deceased employee  
NSO/PSA BIRTH CERTIFICATE of deceased employee

### If married

- NSO/PSA Marriage Contract between the deceased and his/her spouse (original)
- Birth Certificate of surviving spouse/dependent children/incapacitated child/guardian, as the case may be, issued by NSO/PSA (in case not yet registered, late NSO/PSA registration can be filed) (original)
- Marriage Contract of female beneficiary/ies issued by NSO/PSA, if married (original)
- Notarized Affidavit of Surviving Spouse (original)
- Notarized Affidavit of Guardianship of Incapacitated Dependent Child (if applicable) (original)
- Notarized Affidavit of Guardianship of Minor Dependent Child (if applicable) (original)
- Two unexpired valid IDs of surviving spouse/all dependent children/incapacitated child/guardian/witnesses/claimants, as the case may be (e.g. GSIS eCard, SSS ID, Driver's License, School ID, Voter's ID, Passport) (Note: Bring original IDs and photocopies with their affixed original signature)

### If single:

- NSO/PSA Marriage Contract of parents
- NSO/PSA Birth Certificate of parents
- NSO/PSA Certificate of No Marriage (CENOMAR) of the deceased employee
- Affidavit of surviving parents stating under oath that the deceased member at the time of death was not survived by a spouse or dependent children; and that the parents are dependent for support from the said deceased member. If only one surviving parent, NSO Death Certificate of deceased parent.
- If both parents are deceased, Notarized Affidavit of surviving brother/sister of deceased member/pensioner stating under oath that the deceased member/pensioner at the time of death was not survived by a spouse or dependent children; and that they are the only surviving legal heirs, their date of birth and relationship to the deceased member and that they are executing the document for the purpose of claiming the benefit from GSIS. NSO Birth Certificate of surviving siblings. NSO Marriage Contract of all married female siblings of the deceased member. In case of death of siblings, NSO Death Certificate (the portion on the benefit of the deceased sibling/s will be payable to his/her surviving child/ren).
- Two unexpired valid IDs of all surviving parent/siblings/witnesses/claimants, as the case may be (e.g. GSIS eCard, SSS ID, Driver's License, Voter's ID, Senior Citizens ID, Office ID, Passport) (Note: Bring original IDs and photocopies with their affixed original signature)

### Other Requirements:

- Notarized Affidavit of Surviving Legal Heirs stating among others that affiants are the only surviving legal heirs of the deceased member, their date of birth and relationship to the deceased member and that they are executing the document for the purpose of claiming the terminal leave/service recognition pay/faculty sick leave and other survivorship benefit from the University of the Philippines (original)
- Notarized Deed of Waiver of Rights (original)
- Notarized Undertaking of Trust and Quit Claims (original)

(Note: UP Diliman Legal Office reserves the right to request additional documents if deemed necessary)



## Basic Requirements for GSIS Survivorship Benefit/Death/Funeral Claims

- Application for Survivorship Benefit
- Application for Death Claim / CSV – Death
- Death Certificate of member / pensioner issued by NSO / PSA, (original and two photocopies)
- Marriage Certificate between the deceased and his/her spouse issued by NSO/PSA, (original with two photocopies)
- Birth Certificate of surviving spouse/dependent children/incapacitated child/surviving parent/guardian, as the case may be, issued by NSO (in case not yet registered, late NSO/PSA registration can be filed), (all original with two photocopies)
- Marriage Contract of female beneficiary/ies issued by NSO/PSA, if married, (all original with 2 photocopies)
- Notarized Affidavit of Guardianship of Incapacitated Dependent Child, supported with medical certificate (two original affidavits with two photocopies)
- Notarized Affidavit of Guardianship of Minor Dependent Child, (two original affidavits with two photocopies). If the legal Guardian is not the natural parent, the affidavit should be supported by a Certificate from the Barangay and DSWD, NSO Birth Certificate and two valid IDs of guardian
- Notarized Affidavit of Surviving Spouse (use GSIS form) (two original affidavits with two photocopies)
- Notarized Affidavit of Surviving Legal Heirs stating among others that affiants are the only surviving legal heirs of the deceased member, their date of birth and relationship to the deceased member and that they are executing the document for the purpose of claiming the benefit from GSIS, (two original affidavits with two photocopies)
- Notarized Certificate of No Pending Administrative/Criminal Case, (two original with two photocopies)
- Service Record, (original with two photocopies certified by UP Diliman HRDO)
- Certification of Last Day of Service, if member died in active service (original and two photocopies certified by UP Diliman HRDO)
- Certificate of Leave without pay (original and two photocopies certified by UP Diliman HRDO)
- Two unexpired valid IDs of surviving spouse/dependent children/incapacitated children/ surviving parents/ guardian, as the case may be (e.g. GSIS eCard, SSS ID, Driver's License, Passport)  
(Note: Bring original IDs. Photocopy the IDs – back to back – and then affixed their original signatures on the xerox copies)
- GSIS Funeral Benefit (Bring all Original Receipts) (Note: If the spouse will be the one to apply for the Funeral Benefit, no need to present the Memorial Service Certificate)
- Notarized Declaration of Pendency/Non-Pendency of Case

(Note: GSIS reserves the right to request additional documents if deemed necessary)



### **Basic Requirements for Pag-IBIG Fund Survivorship Benefit**

- APPLICATION FOR PROVIDENT BENEFITS (APB) CLAIM
- Death Certificate of member / pensioner issued by NSO / PSA, (original and one photocopy)
- Marriage Certificate between the deceased and his/her spouse issued by NSO/PSA, or NSO/PSA Advisory on Marriages of Deceased Member (original and one photocopy)
- Birth Certificate of surviving spouse/dependent children/incapacitated child/surviving parent/guardian, as the case may be, issued by NSO (in case not yet registered, late NSO/PSA registration can be filed), (original and one photocopy)
- Marriage Contract of female beneficiaries issued by NSO/PSA, if married.
- Affidavit of Surviving Legal Heirs stating among others that affiants are the only surviving legal heirs of the deceased member, their date of birth and relationship to the deceased member and that they are executing the document for the purpose of claiming the survivorship benefit from Pag-IBIG Fund, (original and one photocopy)
- Notarized Affidavit of Guardianship of Incapacitated Dependent Child, supported with medical certificate,(original and one photocopy)
- Notarized Affidavit of Guardianship of Minor Dependent Child, (original and one photocopy). If the legal Guardian is not the natural parent, the affidavit should be supported by a Certificate from the Barangay and DSWD and his/her NSO/PSA Birth Certificate
- Notarized Affidavit of Undertaking (use Pag-IBIG Form)
- Notarized Affidavit of Surviving Spouse, (original and one photocopy)
- Notarized Affidavit of two disinterested persons RE: birth/marriage dates/spelling and other discrepancies in the documents to be submitted
- Service Record, (two photocopies certified by HRDO)
- Two unexpired valid IDs of surviving spouse/dependent children/incapacitated child/ surviving parent/guardian/witnesses/claimant, as the case may be (e.g. GSIS eCard, SSS ID, Driver's License, Passport) (Note: Bring original IDs and photocopies with their affixed original signature)

(Note: Pag-IBIG Fund reserves the right to request additional documents if deemed necessary)