



POLICY AND PROCEDURAL GUIDELINES (PPG) NO. 366-20

FUNCTIONAL AREAS : Frontline Services Divisions
Membership Departments

DISTRIBUTION : All Executive Vice Presidents
All Senior Vice Presidents
All Vice Presidents
All Managers

SUBJECT MATTER : **ENHANCED ANNUAL PENSIONERS INFORMATION
REVALIDATION (APIR) FOR GSIS PENSIONERS**

I. BACKGROUND/RATIONALE

In 2018, the Government Service Insurance System (GSIS) implemented the Enhanced Annual Renewal of Active Status (ARAS) through PPG 323-18. The objectives of the Enhanced ARAS, which was renamed as the **Annual Pensioner Information Revalidation (APIR)**, are to: (a) ensure that only qualified/eligible pensioners would be paid monthly pension, (b) simplify and systematize the monitoring of pensioners, and (c) ensure viability of the pension fund.

The conduct of the APIR is a **shared responsibility** between the GSIS and all its pensioners to ensure the viability of the pension fund and to be able to sustain the continuing increase in the number of pensioners and amount of pension payments due every month.

As of June 2020, we have a total of 372,992 old age pensioners and 139,784 survivorship pensioners, of which, 79 years old and below are required to undergo APIR during their birth month either through the kiosk or by physical appearance at any GSIS Office nationwide to avoid suspension of pension. For pensioners age 80 and above, the status verification activity was being performed by personnel of the Philippine Postal Corporation (PHLPost) which required the physical interaction between the GSIS pensioner and PHLPost personnel.

As we progress to the new normal, APIR through online platforms become imperative. The Enhanced APIR for GSIS Pensioners will allow thorough verification to ensure security as well as engaging in face to face procedures using the online method. This alternative online process using social media and video conferencing platforms [e.g. Viber, Facebook (FB) Messenger, Zoom and Skype] shall be used for the annual renewal of active status during birth month, the updating of active status of pensioner with suspended pension and verification of active status for the payment of milestone benefit.

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28 December 2020

The online APIR process shall likewise replace the status verification activity of PHLPost. Inasmuch as the project has been fruitful to both GSIS and PHLPost, it is high time to shift our business process model to ***"contactless and online transactions"*** especially for pensioners, in view of the significant limitations caused by COVID-19 and community quarantines in the delivery of GSIS services to pensioners. Moreover, in removing our dependency on the timeliness of PHLPost's reporting, the GSIS will be able to more promptly determine the status of our pensioners aged 80 and above.

For incapacitated pensioners residing in remote areas of the country where access to internet connectivity may pose a problem, GSIS shall continue to provide home visitation to these select pensioners.

II. OBJECTIVES

This PPG aims to:

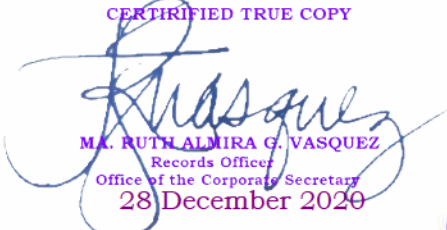
- A. Introduce multiple methods of complying with the APIR in order to prevent accumulation of pension overpayments and to comply with the verification of milestone benefit recipients;
- B. Provide the necessary guidelines for the different modes of APIR;
- C. Address the APIR of pensioners who have challenged mobility brought about by age, health and physical condition, which include:
 - 1. Pensioners who are 80 years old and above;
 - 2. Retired under Permanent Total Disability (PTD);
 - 3. Under home, hospice, hospital care or penitentiary confinement; and
 - 4. Reported to have mental illness.
- D. Define the delineation of functions of different operating units handling the APIR of pensioners for pro-active monitoring of their status; and
- E. Minimize or eliminate losses to GSIS arising from crediting of pensions to deceased pensioners or from misrepresentation.

III. COVERAGE

The APIR shall be compulsory to all active old-age and survivorship pensioners whether residing in the Philippines or abroad except for:

- A. Old-age pensioners who are also active GSIS members, as applicable; and
- B. Guardians of incapacitated and/or dependent children, unless they are also the survivorship pensioners, in which case they shall be required to undergo the APIR and be subjected to home visit or video interview to verify if the incapacitated and/or dependent children are living with the survivorship pensioner-guardian.

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IV. POLICIES

A. VARIOUS MODES OF UNDERTAKING APIR

APIR may be undertaken through any of the following modes:

1. GSIS Wireless Automated Processing System (GWAPS) kiosk located at GSIS Offices, partner agencies and partner institutions (i.e., Robinsons Malls and SM Supermalls) nationwide;
2. Personal appearance and manual activation at any GSIS Office or Service Desk;
3. Personal online interview, arranged through eMail or Short Messaging Service (SMS), for pensioners based in the Philippines;
4. Visitation at the Home/Hospital/Hospice/Penitentiary for pensioners based in the Philippines; or
5. Personal online interview, arranged through eMail filing, for pensioners based abroad.

B. DOCUMENTARY REQUIREMENTS FOR THE VARIOUS MODES OF UNDERTAKING APIR

Below are the necessary documentary and ID requirements required of a pensioner who shall be undertaking APIR:

1. APIR through GWAPS kiosk:

GSIS-issued Unified Multi-Purpose Identification Card (UMID) eCard.

2. APIR through personal appearance at any GSIS Office or Service Desk:

- a. Duly accomplished Annual Pensioners Information Revalidation (APIR) Form (Annex A);
- b. Original UMID eCard, eCard Plus or in its absence at least two (2) valid government issued IDs;
- c. For survivorship pensioners, duly accomplished Self-declaration of Surviving Spouse (on Non-Marriage/Non-Cohabitation) form (Annex B) which states, among others, that he or she has not remarried nor engaged in a common law relationship. Failure of the survivorship pensioner to accomplish and submit the Self-declaration of Surviving Spouse (on Non-Marriage/Non-Cohabitation) form shall result in the non-renewal of active status and suspension of survivorship pension; and
- d. For PTD Pensioners below 60 years of age, a copy of the annual Medical Progress Report (MPR) shall be required.

Note: Under this mode, original documents and duly accomplished and signed forms shall be required for submission.

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3. APIR through personal online interview, arranged through eMail filing, for pensioners based in the Philippines and abroad:
 - a. Original UMID eCard, eCard Plus or in its absence at least two (2) valid government issued IDs;
 - b. For survivorship pensioners, duly accomplished Self-declaration of Surviving Spouse (on Non-Marriage/Non-Cohabitation) form (Annex B) which states, among others, that he or she has not remarried nor engaged in a common law relationship. Failure of the survivorship pensioner to accomplish and submit the Self-declaration of Surviving Spouse (on Non-Marriage/Non-Cohabitation) form shall result in the non-renewal of active status and suspension of survivorship pension; and
 - c. For PTD Pensioners below 60 years of age, a copy of the annual Medical Progress Report (MPR) shall be required.
4. APIR, arranged through SMS filing, for pensioners based in the Philippines shall present the following during the online interview:
 - a. Original UMID eCard, eCard Plus or in its absence at least two (2) valid government issued IDs;
 - b. For survivorship pensioners, duly accomplished Self-declaration of Surviving Spouse (on Non-Marriage/Non-Cohabitation) form (Annex B) which states, among others, that he or she has not remarried nor engaged in a common law relationship. Failure of the survivorship pensioner to accomplish and submit the Self-declaration of Surviving Spouse (on Non-Marriage/Non-Cohabitation) form shall result in the non-renewal of active status and suspension of survivorship pension; and
 - c. For PTD Pensioners below 60 years of age, a copy of the annual Medical Progress Report (MPR) shall be required.
5. APIR through visitation at the Home/Hospital/Hospice/Penitentiary for pensioners based in the Philippines:
 - a. Letter request signed by the pensioner, relative, representative or guardian of the pensioner indicating reason(s) for visit request (e.g. physical condition of pensioner, pensioner is unable to speak or pensioner is not of sound mind);
 - b. Photocopy of the pensioner's UMID eCard (front only), eCard Plus (front only) or in its absence at least two (2) valid government-issued IDs (front and back);
 - c. Sketch of the place where visit is to be conducted;
 - d. For survivorship pensioners, duly accomplished Self-declaration of Surviving Spouse (on Non-Marriage/Non-Cohabitation) form which states, among others, that pensioner has not remarried nor engaged in a common law relationship. Failure of the relative, representative or guardian to accomplish and submit the Self-declaration of Surviving Spouse (on Non-Marriage/Non-Cohabitation) form on behalf of the pensioner shall result in the non-renewal of active status and suspension of survivorship pension; and
 - e. For pensioners under custody of a penal institution, a certificate of incarceration issued by the Jail Management or Warden.

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C. GENERAL GUIDELINES IN THE ENHANCED APIR FOR GSIS PENSIONERS

1. The APIR shall be done during the birth month of the old-age or survivorship pensioner. Request for renewal of active status on a date earlier than the birth month shall not be allowed.

Example:

An old-age pensioner whose birthday falls on December 31 shall be required to do APIR anytime within December.

2. The reporting for APIR by the pensioner shall result in the renewal of the active status and accrual shall be processed when necessary.
3. Failure of the pensioner to report for the APIR within the birth month shall result in suspension of payment of monthly pension starting on the month following the birth month by the Technical Services Department, NCR Operations Group.
4. A survivorship pensioner who is also an active GSIS member, shall be required to undergo the APIR and to accomplish the Self-declaration of Surviving Spouse (on Non-Marriage/Non-Cohabitation).
5. In preparation for the scheduled online interviews, the pensioners who opt to undertake APIR through this mode shall be reminded of the following:
 - a. Send an eMail or SMS (text message) reply to GSIS confirming the online interview schedule;
 - b. Find a well-lit area with strong internet connectivity for the conduct of online interview. In case of disconnection due to intermittent internet connection, wait for GSIS online message/advice or call back;
 - c. Find an area where there is minimal background noise or ambient sound;
 - d. Be online at least 15 minutes before the scheduled online interview;
 - e. Ensure that the device(s) (mobile device, webcam, headphones, microphone, or speakers) to be used for the online interview are working; and
 - f. Prepare to show the original eCard/UMID ID or valid IDs.

Note: GSIS shall be initiating the online interview through video call and will not entertain inbound video calls.

6. The concerned Operations unit shall endeavor to get in touch through the most efficient and secure manner with the pensioners on their birth month for their annual reporting requirement.
7. Notwithstanding the modes of undertaking APIR above, the Operating Unit Concerned (OUC) will not be precluded from conducting online interview or validation of pensioners from time to time in order to establish proof of life.

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D. GUIDELINES ON UNDERTAKING VARIOUS MODES OF APIR

1. APIR THROUGH GSIS KIOSK

- a. A pensioner who will be undertaking the APIR on the birth month through any GSIS GWAPS kiosk located at GSIS Offices, partner agencies and partner institutions (i.e., Robinsons Malls and SM Supermalls) nationwide should bring the valid GSIS-issued UMID eCard.
- b. The pensioner must complete the procedures of APIR via GWAPS kiosk by clicking on the required icons.
- c. In cases where a pensioner is unable to complete the APIR via the GWAPS kiosk (e.g. unreadable card, unreadable biometrics and etc.), the pensioner may opt to do manual activation at any GSIS Office or GSIS Service Desk or schedule the APIR through eMail or SMS filing.
- d. For survivorship pensioners, the Self-declaration of Surviving Spouse (on Non-Marriage/Non-Cohabitation) form shall be accomplished through the GWAPS kiosk which states, among others, that he or she has not remarried nor engaged in a common law relationship. Failure of the survivorship pensioner to accomplish and submit the Self-declaration of Surviving Spouse (on Non-Marriage/Non-Cohabitation) form shall result in the non-renewal of active status and suspension of survivorship pension.

2. APIR THROUGH PERSONAL APPEARANCE AND MANUAL ACTIVATION AT ANY GSIS OFFICE OR SERVICE DESK

- a. Pensioners who will be undertaking the APIR at any GSIS Office or Service Desk shall submit the original and complete documentary requirements.
- b. The GSIS personnel attending to the pensioner shall take a photo of the pensioner and the presented UMID eCard (front only), eCard Plus (front only) or in its absence at least two (2) valid government issued IDs (front and back) during the personal appearance.

3. APIR THROUGH PERSONAL ONLINE INTERVIEW, ARRANGED THROUGH EMAIL FILING (residing in the Philippines)

- a. For pensioners who will opt to undertake the APIR via online interview, the complete documentary requirements shall be submitted through electronic mail to the designated eMail address of the GSIS Handling Unit.
- b. The complete documentary requirements shall be submitted observing the following guidelines:

- 1) Subject line: APIR (Birth Month of pensioner) / <Surname>_<First Name>_<Middle Name>;

Example: APIR (December) / Dela Cruz_Juana Amanda_Cortez



- 2) All the documentary requirements shall be sent as eMail attachments in Portable Document Format (PDF) or as Joint Photographic Experts Format (JPEG) not exceeding 4MB per eMail message;
- 3) Body of the email shall include the following:
 - a) Complete Name of Pensioner;
 - b) Preferred channel for online video interview:
 - i. FB Messenger username;
 - ii. Viber number (with country code);
 - iii. Skype address; or
 - iv. Email address for Zoom.
 - c) Date of Birth;
 - d) Landline or mobile number;
 - e) Complete address; and
 - f) GSIS Business Partner (BP) or Common Reference Number (CRN).
- c. Upon receipt of eMail request, evaluation on the completeness of the submitted documentary requirements shall be undertaken.
- d. Within two (2) working days from receipt of eMail, the GSIS shall send an acknowledgement eMail to the pensioner.

Note: The acknowledgement eMail shall contain a reminder that the pensioners should check their eMail regularly for the online interview schedule.
- e. Within three (3) working days from receipt of eMail request, the GSIS shall send an eMail indicating the details below:
 - 1) Date of online interview;
 - 2) Approximate time of online interview;
 - 3) Social media app or video conferencing software to be used; and
 - 4) Reminders for pensioner undertaking the APIR.
- f. The pensioner is required to send the confirmation of the schedule through eMail within three (3) working days from the date of the GSIS eMail. If no feedback is received, the GSIS shall send a maximum of two (2) email tracker(s) as follow-up. Failure of the pensioner to confirm the appointment will result in the cancellation of the APIR schedule or appointment.
- g. The APIR shall be conducted through a web-based social media app or video conferencing software (e.g. Viber, Skype, Zoom or FB Messenger) indicated/preferred by the pensioner.
- h. The submitted UMID eCard/eCard Plus or in its absence at least two (2) valid government issued IDs shall be presented by the pensioner during the online interview to be conducted by a GSIS personnel.
- i. The GSIS personnel attending to the pensioner shall take a photo of the pensioner holding the presented UMID eCard (front only), eCard Plus (front

only) or in its absence at least two (2) valid government issued IDs (front and back) during the conduct of the online interview.

- j. The unit concerned shall assign personnel who shall prepare the list of pensioners scheduled for video call (for the day), together with the following information to serve as reference documents in validating the pensioner's identity and status:

- 1) Pensioner's complete name;
- 2) Pensioner's mobile number (for Viber), social media app User Name (for FB Messenger) and/or eMail name address (for Skype or Zoom);
- 3) Pensioner's eMail account;
- 4) SAP pension record; and
- 5) Picture on file (eJar or Retirement envelope).

- k. The successful online interview shall result in the renewal of active status of the pensioner.

- l. The following may also result in the suspension of pension:

- 1) Failure of the pensioner to be online during the scheduled online interview;
- 2) When the identity of the pensioner was not successfully confirmed during the video conference;
- 3) For survivorship pensioners, the non-submission or wrongful declaration of the Self-Declaration of Non-Marriage/Cohabitation; or
- 4) For PTD pensioners below 60 years of age, the non-submission of the annual MPR.

- m. The GSIS personnel undertaking the online interview shall process the validation of active status of the pensioner by accomplishing the APIR Interview Form (Annex C) and attach said form to the Transaction Monitoring System (TMS) record to document the request for renewal of active status.

4. APIR THROUGH PERSONAL ONLINE INTERVIEW, ARRANGED THROUGH SMS (residing in the Philippines)

- a. For pensioners who will opt to arrange the APIR online interview via SMS (or text message), the following information shall be submitted through the designated mobile number of the GSIS Handling Unit:

- 1) Complete Name of Pensioner;
- 2) Date of Birth of Pensioner;
- 3) Preferred channel for online video interview:

- a) FB Messenger username;
- b) Viber number;
- c) Skype address; or
- d) Email address for Zoom.

- b. Within four (4) hours from receipt of SMS (or text), the GSIS shall send an acknowledgement message to the pensioner (during business hours only).
- c. Within two (2) working days from receipt of pensioners SMS (text message), the GSIS shall send a text reply indicating the details below:
 - 1) Date of online interview;
 - 2) Approximate time of online interview;
 - 3) Social media app or video conferencing software to be used;
 - 4) Reminders for pensioner undertaking the APIR; and
 - 5) *If a survivorship pensioner, text message should also indicate the submission of the duly accomplished Self-declaration of Surviving Spouse (on Non-Marriage/Non-Cohabitation) form which states, among others, that pensioner has not remarried nor engaged in a common law relationship.*
- d. The pensioner is required to send the confirmation of the schedule through text within three (3) working days from the date of the GSIS message. If no feedback is received, the GSIS shall send a maximum of two (2) text follow-ups. Failure of the pensioner to confirm the appointment will result in the cancellation of the APIR schedule or appointment.
- e. The APIR shall be conducted through a web-based social media app or video conferencing software (e.g. Viber, Skype, Zoom or FB Messenger) indicated/preferred by the pensioner.
- f. The UMID eCard/eCard Plus or in its absence at least two (2) valid government issued IDs shall be presented by the pensioner during the online interview to be conducted by a GSIS personnel.
- g. The GSIS personnel attending to the pensioner shall take a photo of the pensioner and the presented UMID eCard (front only), eCard Plus (front only) or in its absence at least two (2) valid government issued IDs (front and back) during the conduct of the online interview.
- h. The unit concerned shall assign personnel who shall prepare the list of pensioners scheduled for video call (for the day), together with the following information to serve as reference documents in validating the pensioner's identity and status:
 - 1) Pensioner's complete name;
 - 2) Pensioner's mobile number (for Viber), social media app User Name (for FB Messenger) and/or eMail name address (for Skype or Zoom);
 - 3) SAP pension record; and
 - 4) Picture on file (eJar or Retirement envelope).
- i. The successful online interview shall result in the renewal of active status of the pensioner.
- j. The following may also result in the suspension of pension:



- 1) Failure of the pensioner to be online during the scheduled online interview;
 - 2) When the identity of the pensioner was not successfully confirmed during the video conference;
 - 3) For survivorship pensioners, the non-submission or wrongful declaration of the Self-Declaration of Non-Marriage/Cohabitation; or
 - 4) For PTD pensioners below 60 years of age, the non-submission of the annual MPR.
- k. The GSIS personnel undertaking the online interview shall process the validation of active status of the pensioner by accomplishing the APIR Interview Form (Annex C) and attach said form to the TMS record to document the request for renewal of active status.

5. APIR OF PENSIONERS FOR HOME, HOSPITAL, HOSPICE AND PENITENTIARY VISIT

- a. Pensioners unable to report for the APIR due to health reasons or confinement to a penal institution (e.g., confined in the hospital, or care facility, or bedridden, or can no longer be interviewed or currently incarcerated) may request for GSIS visit.
- b. The request for GSIS Home, Hospital, Hospice or Penitentiary visit, together with the required applicable documentary requirements, may be sent through any of the following means, at least one (1) month before the birth month of the pensioner:
 - 1) Submission of the documentary requirements to the nearest GSIS Office by the duly authorized representative; and
 - 2) An eMail request to the GSIS handling unit.
- c. The GSIS personnel shall take a photo of the pensioner together with the relative, representative, guardian or jail warden.
- d. On the date of the conduct of the GSIS visit, the GSIS personnel shall bring either a newspaper of national circulation or the printed visit date on a piece of paper following the Day, Month and Year format.
- e. The GSIS Pensioner Visit Team (PVT) shall schedule the visit anytime during the birth month or on the month following the birth month, at the latest. The pensioner shall be excluded from suspension of active status due to non-APIR, in case the GSIS schedules the home visit on the month following the birth month of the pensioner.
- f. The Pensioner Visit Form (Annex D) shall be accomplished upon completion of the status verification of pensioner. The PVT shall ensure the accomplishment of the form and may require the pensioner, relative, representative, guardian or competent person in authority to affix their signature or thumbprint, when necessary. If the information/circumstances obtained during the home visit are doubtful, the PVT should interview

neighbors or the barangay officials and request them to sign on the PVR attesting as to the veracity of the information gathered.

Note: A manual override on the APIR system shall be undertaken by the Division Chief or Department/Branch Manager of the Operating Unit Concerned (OUC)/Branch Office (BO) concerned upon receipt of the Pensioner Visit Report (PVR), to renew the status of pensioners.

- g. A pensioner shall be tagged as "Suspended" when, during the conduct of the pensioner visit, the pensioner is not in the declared address or refuses to be interviewed with the GSIS personnel.
- h. A pensioner shall be tagged as "Deceased" when, during the conduct of the pensioner visit, a relative, guardian, representative, competent person in authority informs the PVT of the pensioner's death. The PVT may also request for the same tagging if the information was garnered during an interview with the neighbors or barangay officials.
- i. In instances where a pensioner is to be tagged as "Deceased", the GSIS shall coordinate with the pensioner's servicing bank for account restrictions.
- j. In cases where the request for GSIS visit is filed outside of the operational jurisdiction of the handling GSIS Office or Service Desk, this shall be referred to the GSIS Office/Branch which has jurisdiction on the location of the pensioner.

6. APIR THROUGH PERSONAL ONLINE INTERVIEW, ARRANGED THROUGH EMAIL FILING OR WEB-BASED APPOINTMENT (residing Abroad)

- a. For pensioners residing abroad, the Pension Global Team (PGT) shall be responsible for implementing the following guidelines in the conduct of APIR through a web-based social media app or video conferencing software (Viber, Skype, Zoom or FB Messenger) indicated/preferred by the pensioner.
- b. The APIR through online interview shall be scheduled on the birth month of the pensioner. The pensioner shall request through eMail, one month before the birth month, to set an appointment for their APIR through any of the following means:
 - 1) GSIS Skype Appointment System (<http://gsis-sas.teleserv.ph/>);
 - 2) An email request to the GSIS Contact Center (gsiscare@gsis.gov.ph);
or
 - 3) An email request to pensionglobal@gsis.gov.ph.
- c. The complete documentary requirements shall be submitted observing the following guidelines:
 - 1) Email requests shall be sent to pensionglobal@gsis.gov.ph OR gsiscare@gsis.gov.ph.



- 2) Subject line: APIR Abroad (Birth Month of pensioner) / <Surname>_<First Name>_<Middle Name>;

Example: APIR Abroad (December) / Dela Cruz_Juana Amanda_Cortez

- 3) Body of the email shall include the following:

- a) Complete Name of Pensioner;
 - b) Preferred channel for online video interview:
 - i. FB Messenger username;
 - ii. Viber number (with country code);
 - iii. Skype address; or
 - iv. Email address for Zoom.
 - c) Date of Birth;
 - d) Landline or mobile number;
 - e) Complete address; and
 - f) GSIS BP Number or CRN.
- 4) All the documentary requirements shall be sent as eMail attachments in PDF or as JPEG not exceeding 4MB per eMail message; and
- 5) The submitted UMID eCard/eCard Plus or in its absence at least two (2) valid government-issued IDs shall be presented by the pensioner during the online interview to be conducted by a GSIS personnel.
- d. Upon receipt of eMail request, evaluation on the completeness of the submitted documentary requirements shall be undertaken.
- e. Within two (2) working days from receipt of the eMail request, the GSIS shall send an acknowledgement eMail to the pensioner.
- Note: The acknowledgement eMail shall contain a reminder that the pensioners should check their eMail regularly for the online interview schedule.*
- f. Once the request for appointment is received and the schedule for APIR is determined, the PGT shall eMail, within three (3) working days, the following details of the online interview at the given eMail address of the pensioner:
- 1) Date of appointment;
 - 2) Time of appointment (Philippine time will be provided and specified in the eMail);
 - 3) Social media app or video conferencing software to be used; and
 - 4) Reminders in preparation for the online interview call.
- g. The pensioner is required to send the confirmation of the schedule through eMail within three (3) working days from the date of GSIS eMail. If no feedback is received, the GSIS shall send a maximum of two (2) email tracker(s) as follow-up. Failure of the pensioner to confirm the appointment will result in the cancellation of the APIR schedule or appointment.



If the GSIS provided schedule is not convenient with the pensioner, a new date and time may be provided, subject to slot availability.

- h. The PGT shall assign the Officer(s) of the Day, who shall prepare the list of pensioners scheduled for online interview (for the day), together with the following information to serve as reference documents in validating the pensioner's identity and status:

- 1) Pensioner's complete name;
- 2) Pensioner's mobile number (for viber) social media app User Name (for FB Messenger) and/or eMail name address (for Skype or Zoom);
- 3) Pensioner's eMail account;
- 4) SAP pension record; and
- 5) Picture on file (eJar or Retirement envelope).

The pensioner's original eCard or UMID Card must be presented during the video interview.

Note: In case of loss of eCARD or UMID eCard, or as part of the validation process for survivorship pensioners who may have remarried abroad and changed name but have not reported the same to GSIS, the presentation of two (2) other original valid IDs shall be required.

The original valid IDs include, but not limited, to the following:

- 1) Passport;
 - 2) State ID-abroad;
 - 3) Social Security Insurance ID;
 - 4) Citizenship green card/residency;
 - 5) Driver's license; and/or
 - 6) Any Philippine government-issued valid ID.
- i. The assisting GSIS personnel undertaking the online interview shall process the validation of active status of the pensioner by accomplishing the APIR Interview Form and create a TMS record to document the request for renewal of active status.
- j. The successful validation of pensioner status through the online interview shall result in the renewal of active status of the pensioner abroad.
- k. The following may also result in the suspension of pension of a pensioner residing abroad:
- 1) Failure of the pensioner to be online during the scheduled video call;
 - 2) When the identity of the pensioner was not successfully confirmed during the video conference;
 - 3) For survivorship pensioners, the non-submission or wrongful declaration of the self-declaration of non-marriage/cohabitation; and
 - 4) For disability pensioners below 60 years of age, the non-submission of the annual medical progress report.



- l. In the event that a pensioner residing abroad is in the Philippines for a visit on the birth month and personally appears at the GSIS Office for APIR, the pensioner shall be subject to the guidelines on the "APIR Through Personal Appearance and Manual Activation at Any GSIS Office or Service Desk.
- m. A pensioner abroad who has requested change in their address from foreign to local shall subsequently be subject to APIR policy for pensioners residing in the Philippines.

E. PROCESSING OF PENSION AFTER STATUS VERIFICATION

1. The processing of pension accrual due upon updating of pensioner status (from "Suspended" to "Active") shall be undertaken by the Frontline Services Division (FSD) of the NCR, Luzon and VisMin Operations Group.
2. The processing of other pension benefits that are dependent upon the result of home visit of pensioner (i.e., Milestone Benefit) shall likewise be undertaken by the FSD of the NCR, Luzon and VisMin Operations Groups.
3. The FSD shall process the pension accrual and transmit the disbursement file to the servicing bank for e-crediting of the amount in the pensioner's eCard.
4. The pensioner previously suspended due to non-renewal of active status may be qualified to receive pension increases and/or cash gift, subject to Board approval and compliance with the conditions on the entitlement to such pension increase and/or cash gift.

F. APIR FOR PENSIONERS 80 YEARS OLD AND ABOVE

Pensioners who are 80 years old and above will now be required to undergo the APIR. Upon the approval of this PPG, the APIR shall be initiated by the GSIS through the following:

1. Written notice from the GSIS (OUC/Branch concerned) that henceforth APIR shall be required on the birth month of the pensioner through kiosk, manual, online or GSIS visit; and

Example A:

Pensioner's birthdate	:	15 May 1932
Required APIR	:	May 2021

Example B:

Pensioner's birthdate	:	1 December 1932
Required APIR	:	December 2020

2. Sending of SMS reminder on the pensioner's birth month to undergo APIR.

G. MILESTONE BENEFIT

Validation for the grant of milestone benefit ON or AFTER the birthdate of the eligible pensioner may be undertaken through any of the following means:



1. Personal appearance of eligible pensioner at any GSIS office or Service Desk;
2. Online interview of eligible pensioner; or
3. Home, Hospital, Hospice or Penitentiary visit to eligible pensioner.

V. PROCEDURAL GUIDELINES

The detailed procedures to be included in the Manual of Operations of the OUCs shall adhere to the following general guidelines:

A. APIR THROUGH PERSONAL APPEARANCE AND MANUAL ACTIVATION AT ANY GSIS OFFICE OR SERVICE DESK

ACTIVITY	RESPONSIBILITY (Central Office and Branch Offices)
1. Review pensioner's submitted documentary requirements for completeness: <ol style="list-style-type: none"> a. Duly accomplished APIR Form; b. Original GSIS issued UMID eCard, eCard Plus or in its absence, at least two (2) valid government-issued IDs; c. For survivorship pensioners, the self-declaration of non-marriage/non-cohabitation; and d. For disability pensioners who are below 60 years old, the copy of the MPR. 1.1 If with complete documentary requirements and birth month is prior or current month, proceed to Activity 2; or 1.2 If with incomplete documentary requirements or APIR Form is not duly accomplished, require pensioner to complete the documentary requirements to revert to Activity 1.	Designated Personnel
2. Capture the pensioner's photo (with the eCard or IDs), accomplish the APIR Interview Form and create TMS record. Attach all required documentary requirements to TMS and proceed to Activity 3.	FSD Staff Officer I (SO I) / Staff Officer II (SO II)
3. Remove TMS tag "Hold" and review attached documents for compliance: <ol style="list-style-type: none"> 3.1 If acceptable, renew status of pensioner in GW@PS and proceed to Activity 4; or 3.2 If not acceptable, revert to Activity 2. 	FSD Staff Officer (SO) III (Team Leader) or Officer I (Division Chief)
4. Check status of renewal in GW@PS APIR Transaction History and ID expiration date in SAP: <ol style="list-style-type: none"> 4.1 If status is renewed and ID expiration date is updated, proceed to Activity 5; or 	FSD SO I / SO II and Membership Department (MD) concerned

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ACTIVITY	RESPONSIBILITY (Central Office and Branch Offices)
<p>4.2 If status is renewed and ID expiration date is not updated:</p> <p>4.2.1 Refer to SO III or Officer I for updating of status; then</p> <p>4.2.2 Prepare Certified Instruction to Update Record (CIUR) and forward to Membership Department for updating of pensioner record in SAP and revert to Activity 4.</p>	
5. Close TMS	FSD SO I/SO II
End of Process	

B. APIR THROUGH PERSONAL ONLINE INTERVIEW, ARRANGED THROUGH EMAIL FILING (Pensioners based in the Philippines)

ACTIVITY	RESPONSIBILITY (Central Office and Branch Offices)
<p>1. Receive and review eMail APIR request as to submission on the correct birth month and completeness of submitted documents within two (2) working days from receipt of eMail:</p> <p>a. Original GSIS issued UMID eCard, eCard Plus or in its absence, at least two (2) valid government issued IDs;</p> <p>b. For survivorship pensioners, the self-declaration of non-marriage/non-cohabitation; and</p> <p>c. For disability pensioner below 60 years old, MPR.</p> <p>1.1. If with complete documentary requirements, birth month is the current or after the pensioner's month, send acknowledgement receipt, create TMS, attach submitted documents and proceed to Activity 2; or</p> <p>1.2. If with incomplete documentary requirements, or eMail request is submitted not within the birth month, send an eMail reply and require pensioner to complete the documentary requirements or resubmit during the birth month.</p>	Designated Personnel
2. Within three (3) working days from receipt of eMail request, schedule an online interview and send eMail to pensioner with request for confirmation/rescheduling within three (3) working days with details below:	Designated Personnel



ACTIVITY	RESPONSIBILITY (Central Office and Branch Offices)
<ul style="list-style-type: none"> a. Date of online interview; b. Approximate time of online interview; c. Social Media app or Video Conferencing software to be used; and d. Reminders for online interview. <p><i>Note: OUCs are required to save documents submitted by the pensioner to the shared folder (on APIR) to be accessed by the online validator(s).</i></p>	
<p>3. Tag "Hold" the TMS while waiting for confirmation/rescheduling from pensioner:</p> <ul style="list-style-type: none"> 3.1 Upon receipt of confirmation of online interview proceed to Activity 4; 3.2 If without confirmation within three (3) working days, send tracker(s) and TMS will continue to be put on hold. If no feedback is received after two (2) email trackers, the TMS shall be closed; and 3.3 If provided date and/or time is not convenient or pensioner is not amenable provide alternative date and/or time. <p><i>Note: Personnel doing the scheduling should wait for the confirmatory eMail from the pensioner. Designated personnel will also provide the online interviewer with the list of pensioners to be interviewed, their time slots and preferred online channel and TMS Reference one (1) working day prior to the interview.</i></p>	FSD SO I/SO II/SO III
<p>4. Conduct the online interview.</p> <ul style="list-style-type: none"> 4.1 Confirm identify of pensioner by asking questions relative to the identity (i.e., birth date, last employment, name of parents, and other details found in SAP and eJAR database) and check on distinguishing marks as seen in the picture on file (from eJAR or retirement envelope); 	FSD SO I/SO II (designated online interviewer)

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Ruth Almiras Vasquez
M.A. RUTH ALMIRA G. VASQUEZ
 Records Officer
 Office of the Corporate Secretary
 28 December 2020



ACTIVITY	RESPONSIBILITY (Central Office and Branch Offices)
<p>4.2 For survivorship pensioner, request presentation of two (2) other valid IDs, when necessary for validation, to check if the married name has not changed (which may indicate remarriage);</p> <p>4.3 If identity is successfully confirmed and pensioner answered all security questions correctly, proceed to Activity No. 5; or</p> <p>4.4 If the identity was not successfully confirmed based on the information and documents provided, inform the pensioner of the deficiency and to reschedule the online interview and revert to Activity 4.</p>	
<p>5. Capture the pensioner's photo, GSIS issued UMID eCard/eCard or 2 valid IDs, accomplish the APIR Interview Form and attach to TMS record.</p>	<p>FSD SO I/SO II (designated online interviewer)</p>
<p>6. Remove TMS tag "Hold" and review attached documents for compliance:</p> <p>6.1 If acceptable, renew status of pensioner in GW@PS and proceed to Activity 4; or</p> <p>6.2 If not acceptable, revert to Activity 2.</p>	<p>FSD SO III/Officer I</p>
<p>7. Check status of renewal in GW@PS APIR Transaction History and ID Expiration date in SAP:</p> <p>7.1 If status is renewed and ID Expiration date is updated, proceed to Activity 8; or</p> <p>7.2 If status is renewed and ID Expiration date is not updated:</p> <p>7.2.1 Refer to SO III or Officer I for updating of status; then</p> <p>7.2.2 Prepare CIUR and forward to Membership Department for updating of pensioner record in SAP. Revert to Activity 7.</p>	<p>FSD SO I/SO II and MD concerned</p>
<p>8. Close TMS</p>	<p>FSD SO I/SO II</p>
<p>End of Process</p>	

C. APIR THROUGH PERSONAL ONLINE INTERVIEW, ARRANGED THROUGH SMS (available for pensioners based in the Philippines only)

ACTIVITY	RESPONSIBILITY (Central Office and Branch Offices)
<p>1. Receive and review SMS (or text message) for APIR as to submission on the correct birth month:</p> <ul style="list-style-type: none"> a. Pensioner details provided in the SMS match GSIS records; and b. Preferred online channel is indicated. <p>1.1. Send an acknowledgement SMS (text message); or</p> <p>1.2. If SMS (text message) request submitted is not within the birth month, inform pensioner to resubmit during the birth month.</p> <p>Note: Acknowledgement SMS (text message) shall be sent within four (4) hours days from receipt (during business hours only).</p>	Designated Personnel
<p>2. Within two (2) working days from receipt of SMS (text message), the GSIS shall send an SMS (text message) indicating the details below:</p> <ul style="list-style-type: none"> a. Date of online interview; b. Approximate time of online interview; c. Social Media app or Video Conferencing software to be used; and d. Reminders for online interview. <p>Note: OUCs are required to save documents submitted by the pensioner to the shared folder (on APIR) to be accessed by the online validator(s).</p>	Designated Personnel
<p>3. Tag "Hold" the TMS while waiting for confirmation/rescheduling from pensioner:</p> <p>3.1 Upon receipt of confirmation of online interview proceed to Activity 5;</p> <p>3.2 If without confirmation within three (3) working days, send follow-up SMS (text message) and TMS will continue to be put on hold. If no feedback is received after two (2) SMS (text message), the TMS shall be closed; and</p> <p>3.3 If provided date and/or time is not convenient or pensioner is not amenable provide alternative date and/or time.</p>	FSD SO I/SO II/SO III



ACTIVITY	RESPONSIBILITY (Central Office and Branch Offices)
<p>Note: Personnel doing the scheduling should wait for the confirmatory SMS (text message) from the pensioner. Designated personnel will also provide the online interviewer with the list of pensioners to be interviewed, their time slots and preferred online channel and TMS Reference one (1) working day prior to the interview.</p>	
<p>4. Conduct the online interview</p> <p>4.1 Confirm identity of pensioner by asking questions relative to the identity (i.e., birth date, last employment, name of parents, and other details found in SAP and eJAR database) and check on distinguishing marks as seen in the picture on file (from eJAR or retirement envelope);</p> <p>4.2 For survivorship pensioner, request presentation of two (2) other valid IDs, when necessary for validation, to check if the married name has not changed (which may indicate remarriage);</p> <p>4.3 If identity is successfully confirmed and pensioner answered all security questions correctly, proceed to Activity No. 5; or</p> <p>4.4 If the identity was not successfully confirmed based on the information and documents provided, inform the pensioner of the deficiency. Reschedule the online interview and revert to Activity 4.</p>	FSD SO I/SO II (designated online interviewer)
<p>5. Capture the pensioner's photo, GSIS issued UMID eCard/eCard or 2 valid IDs, accomplish the APIR Interview Form and attach to TMS record.</p>	FSD SO I/SO II (designated online interviewer)
<p>6. Remove TMS tag "Hold" and review attached documents for compliance:</p> <p>6.1 If acceptable, renew status of pensioner in GW@PS and proceed to Activity 7; or</p> <p>6.2 If not acceptable, revert to Activity 2.</p>	FSD SO III/Officer I
<p>7. Check status of renewal in GW@PS APIR Transaction History and ID Expiration date in SAP:</p> <p>7.1 If status is renewed and ID Expiration date is updated, proceed to Activity 8; or</p>	FSD SO I/SO II and MD concerned

ACTIVITY	RESPONSIBILITY (Central Office and Branch Offices)
<p>7.2 If status is renewed and ID Expiration date is not updated:</p> <p>7.2.1 Refer to SO III or Officer I for updating of status; then</p> <p>7.2.2 Prepare CIUR and forward to Membership Department for updating of pensioner record in SAP. Revert to Activity 7.</p>	
8. Close TMS	FSD SO I/SO II
End of Process	

D. CONDUCT OF STATUS VERIFICATION BY THE GSIS PENSIONERS' VISIT TEAM (PVT):

ACTIVITY	RESPONSIBILITY (Central Office and Branch Offices)
<p>1. Receive request for Home/Hospital/Hospice or Penitentiary visit and check for completeness:</p> <p>1.1 If submitted with complete documents sent via representative, dropbox, email or mail, proceed to Activity 2;</p> <p>1.2 If submitted with incomplete documents:</p> <p>1.2.1 Through representative, return with request for completion of required documents; or</p> <p>1.2.2 Through drop box or mail, inform pensioner or representative of lacking document and proceed to Activity 2.</p> <p>1.3 If submission is for the completion of a previously submitted request, proceed to Activity 2.</p>	Receiving Operating Unit Concerned (OUC)/ Branch Office (BO)/Loans and eServices Unit (LESU)/ Members Assistance Unit (MAU)
2. Create TMS and forward to OUC/BO Central Receiver.	Designated personnel
<p>3. Review forwarded TMS.</p> <p>3.1 If received request is under the operational and/or geographical jurisdiction of the receiving OUC/BO, endorse for scheduling of visit and tag "Hold" TMS until the day of the scheduled visit. Remove the tag "Hold" and proceed to Activity 4.</p>	FSD SO I/SO II/SO III

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ACTIVITY	RESPONSIBILITY (Central Office and Branch Offices)
3.2 If received request is from another OUC/BO that does not have geographical jurisdiction, forward TMS to OUC/BO, endorse for scheduling of visit. Receiving OUC/BO to tag "Hold" TMS until the day of the scheduled visit. Remove the tag "Hold" and proceed to Activity 4.	
<p>4. Conduct visit and upon arrival at the pensioner's location, perform the following validation activities:</p> <p>4.1 Ask for the pensioner's GSIS UMID eCard/eCard Plus or two (2) valid IDs;</p> <p>4.2 Verify if data/information in the eCard and IDs presented matched the pensioner's data in the old age pension record;</p> <p>4.3 Have a photo taken with the pensioner holding the current newspaper or sheet of paper indicating the visit date clearly shown and a photo of the pensioner with the relative, representative, guardian, jail or warden;</p> <p>4.4 Request pensioner to sign or affix thumb mark in the Pensioners Visit Report (PVR) and the relative to attest that a home visit was conducted; and</p> <p>4.5 If the circumstances obtained during the home visit are doubtful, interview neighbors or the barangay officials and request them to sign on the PVR attesting as to the veracity of the information gathered.</p>	Designated Pensioners Visit Team
<p>5. Submit PVR:</p> <p>5.1 If under the same operational and/or geographical jurisdiction, TMS to Officer I, FSD for review and proceed to Activity 6; or</p> <p>5.2 If request for visit is from CO or BO, TMS to Manager for review and return TMS to originating OUC/BO, proceed to Activity 6.</p>	PVT
<p>6. Review PVR:</p> <p>6.1 If pensioner is for renewal of active status, renew status in GW@PS and proceed to Activity 8; or</p>	Officer I/Manager

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ACTIVITY	RESPONSIBILITY (Central Office and Branch Offices)
6.2 If pensioner is for temporary suspension or for tagging as 'Deceased', prepare and forward CIUR, together with the Home Visit Report, to Membership Department and proceed to Activity 7.	
7. Process CIUR and request for restriction of bank account from the Treasury Operations Office, if applicable. Return TMS to FSD, once completed and proceed to Activity 8.	Membership Department/Officer I, FSD
8. Check action. 8.1 If request has been completed, proceed to Activity 9; or 8.2 If request has not been completed, revert to incomplete activity (6 or 7).	Officer I, FSD
9. Close TMS.	
End of Process	

E. PERSONAL ONLINE INTERVIEW, ARRANGED THROUGH EMAIL FILING OR WEB-BASED APPOINTMENT (Pensioners based Abroad)

ACTIVITY	RESPONSIBILITY (Central Office and Branch Offices)
<p>1. Receive and review eMailed APIR request as to submission on the correct birth month and documentary requirements for completeness within two (2) working days from receipt of eMail:</p> <ul style="list-style-type: none"> a. Original GSIS issued UMID eCard, eCard Plus or in its absence at least two (2) valid government issued IDs; b. For survivorship pensioners, the self-declaration of non-marriage/non-cohabitation; and c. For disability pensioner below 60 years old, MPR. <p>1.1 If with complete documentary requirements send acknowledgement receipt, create TMS, attach submitted documents and proceed to Activity 2; or</p>	Designated Personnel

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ACTIVITY	RESPONSIBILITY (Central Office and Branch Offices)
1.2 If with incomplete documentary requirements, send an eMail reply and require pensioner to complete the documentary requirements.	
<p>2. Within three (3) working days from receipt of eMail request, schedule online interview and send eMail to pensioner with request for confirmation/rescheduling within three (3) working days with details below:</p> <ul style="list-style-type: none"> a. Date of online interview; b. Approximate time of online interview (Philippine time will be provided and specified in the eMail); c. Social Media app or Video Conferencing software to be used; and d. Reminders for online interview. <p>Note: OUCs are required to save the documents submitted by the pensioner to the shared folder (on APIR) to be accessed by the online validator(s).</p>	Designated Personnel
<p>3. Tag "Hold" the TMS while waiting for confirmation/rescheduling from pensioner;</p> <ul style="list-style-type: none"> 3.1 Upon receipt of confirmation of online interview proceed to Activity 4; 3.2 If without confirmation within three (3) working days, send tracker(s) and TMS will continue to be put on hold. If no feedback is received after two (2) email trackers, the TMS shall be closed; and 3.3 If provided date and/or time is not convenient or pensioner is not amenable, provide alternative date and/or time. <p>Note: Personnel doing the scheduling should wait for the confirmatory eMail from the pensioner. Designated personnel will also provide the online interviewer with the list of pensioners to be interviewed, their time slots and preferred online channel and TMS Reference one (1) working day prior to the interview.</p>	FSD SO I/SO II/SO III
<p>4. Conduct the online interview:</p> <ul style="list-style-type: none"> 4.1 Confirm identify of pensioner by asking questions relative to the identity (i.e., birth date, last employment, name of parents, and other details found in SAP and eJAR database) and checking on distinguishing marks as seen in the picture on file (from eJAR or retirement envelope); 	FSD SO I/SO II (designated online interviewer)

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ACTIVITY	RESPONSIBILITY (Central Office and Branch Offices)
<p>4.2 For survivorship pensioner, request presentation of two (2) other valid IDs, if necessary, to check if the married name has not changed (which may indicate remarriage);</p> <p>4.3 If identity is successfully confirmed and pensioner answered all security questions correctly, proceed to Activity 5; or</p> <p>4.4 If the identity was not successfully confirmed based on the information and documents provided, inform the pensioner of the deficiency and to reschedule the online interview and revert to Activity 3.</p>	
<p>5. Capture the pensioner's photo, GSIS issued UMID eCard/eCard or 2 valid IDs, accomplish the APIR Interview Form and attach to TMS record, forward TMS and proceed to Activity 6.</p>	<p>FSD SO I/SO II (designated online interviewer)</p>
<p>6. Remove TMS tag "Hold" and review attached documents for compliance:</p> <p>6.1 If acceptable, renew status of pensioner in GW@PS and proceed to Activity 7; or</p> <p>6.2 If not acceptable, revert to Activity 5.</p>	<p>FSD SO III/Officer I</p>
<p>7. Check status of renewal in GW@PS APIR Transaction History and ID expiration date in SAP:</p> <p>7.1 If status is renewed and ID Expiration date is updated, proceed to Activity 8; or</p> <p>7.2 If status is renewed and ID Expiration date is not updated:</p> <p>7.2.1 Refer to SO III or Officer I for updating of status;</p> <p>7.2.2 Prepare CIUR and forward to Membership Department for updating of pensioner record in SAP; then</p> <p>7.2.3 Proceed to Activity 8 after the SO III or Officer I and Membership Department have updated the pensioner's record in SAP.</p>	<p>FSD SO I/SO II and MD concerned</p>
<p>8 Close TMS</p>	<p>FSD SO I/SO II</p>
<p>End of Process</p>	



E. PROCESSING OF PENSION ACCRUAL AFTER STATUS VERIFICATION

ACTIVITY	RESPONSIBILITY (Central Office and Branch Offices)
1. Create TMS, attach APIR Form (as applicable) and online interview form and forward to claims unit for pension accrual due for payment to the pensioner.	Pensioners Lounge/ MAU/LESU
2. Verify the eligibility of the pensioner to the pension accrual: 2.1 If the pensioner is eligible, the accrued pension is computed and approved for payment; or 2.2 If not qualified, the payment of pension accrual is disapproved and pensioner is duly informed of the cause of the disapproval. Proceed to Activity 4.	Claims Unit
3. Process the pension accrual and transmit the disbursement file to the servicing bank for e-crediting of the amount in the pensioner's eCard.	Claims Unit
4. Close TMS	Claims Unit
End of Process	

VI. HARDWARE, DATA AND SYSTEM REQUIREMENTS

The Information Technology Services Group (ITSG) shall provide the necessary hardware and technical requirements to the OUC for the implementation of this PPG.

The Operations Group shall use the existing consolidated user requirements (CUR) and previously undertaken user acceptance testing (UAT) under PPG 323-18 to implement this PPG.

The ITSG shall use the existing program and reportorial requirements to conform to this PPG.

The Internal Audit Services Office and Information Security Office shall review the existing CUR and ensure that all internal controls are in place in the system.

VII. DATA PRIVACY

The OUC shall ensure that the creation and collection, storage and transmittal, use and distribution, retention, as well as disposal and destruction of the personal and sensitive personal data of members, pensioners and other stakeholders, as required by this PPG, adhere to the requirements of the Data Privacy Act.

VIII. INFORMATION DISSEMINATION

The Corporate Communications Office shall prepare the appropriate information materials to disseminate this PPG and its implementation to all GSIS executives, employees and stakeholders.

IX. REPEALING CLAUSE

This PPG shall supersede PPG No. 323-18, as approved under Board Resolution 245 dated 12 December 2017.

This PPG shall likewise supersede the GSIS interim procedure on the Annual Pensioners Information Revalidation (APIR) of Suspended Pensioners for the Duration of the Enhanced Community Quarantine as adopted in March 2020.

Other minor formal amendments and/or revisions that pertain to style, language or numbering, and which do not relate to the substance of this PPG are herein amended accordingly.

X. EFFECTIVITY

This PPG shall take effect after fifteen (15) days from publication in the Official Gazette or in a newspaper of general circulation but the full implementation of which shall commence upon the lifting of the temporary suspension of APIR and the institutionalization of online filing for their annual reporting requirement.

ORIGINAL SIGNED

ROLANDO L. MACASAET
President and General Manager

Date signed: _____

DEC 04 2020

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M. RUTH ALMIRA G. VASQUEZ
Records Officer
Office of the Corporate Secretary
28 December 2020



ANNUAL PENSIONERS INFORMATION REVALIDATION (APIR) FORM

Form No: _____

INSTRUCTIONS: Ensure that the form is properly filled out and submit the duly accomplished form to the GSIS. Do not leave any blank items and indicate check marks (✓) on the provided boxes, when necessary.

WARNING: Direct or indirect commission of fraud, collusion, falsification, misrepresentation of facts, or any other kind of anomaly in the accomplishment of this form, or in obtaining any benefit under this application shall be subject to administrative, civil and/or criminal action. **THIS FORM IS NOT FOR SALE.**

Date: _____

PENSION TYPE:

- ☐ Old Age Pension ☐ Survivorship Pension
(with Self-Declaration of Surviving Spouse) ☐ Old Age and Survivorship
(with Self-Declaration of Surviving Spouse)
☐ Disability Pension (PTD/TTD) ☐ Incapacitated Dependent ☐ Minor Dependent

Last Name		First Name		Middle Name	
Residential Address (House No., Street, Barangay, City/Municipality, Province/State and Zip Code)				New Address: <input type="checkbox"/> Yes <input type="checkbox"/> No	
Date of Birth (mm/dd/yyyy)	Age	GSIS Business Partner (BP) No	Purpose <input type="checkbox"/> APIR <input type="checkbox"/> Milestone Benefit		
Contact No. (Landline)	Mobile Phone No.		E-mail address		
Current Pensioner Status <input type="checkbox"/> Active <input type="checkbox"/> Suspended since _____					

I confirm my understanding of the Privacy Policy of the GSIS pursuant to the requirements of Republic Act (R.A.) No. 10173, otherwise known as the Data Privacy Act, and consent to the manner of collection, use, access, disclosure and processing of my personal and sensitive personal data by the GSIS (details of the GSIS Data Privacy Policy may be found at <https://www.gsis.gov.ph/gsis-privacy-statement/>).

I undertake that, as a GSIS pensioner, I will comply with the APIR on my birth month through any of the various modes for undertaking APIR, and that my failure to undertake the same shall result in the suspension of payment of monthly pension starting on the month following the birth month.

<div>Signature of Pensioner</div> <div>Pensioner's Thumb mark (if unable to affix signature)</div>	Printed Name and Signature of Witnesses to the Thumbmark: (Both witnesses must provide photocopy of 2 valid government-issued IDs)
	1. _____ 2. _____

FOR GSIS USE ONLY (MANUAL APIR): Pensioner personally appeared and was interviewed by the undersigned:

Signature of over printed name of GSIS Personnel	Unit/Department/Branch	Date
		CERTIFIED TRUE COPY

M. Ruth Almira G. Vasquez
M.A. RUTH ALMIRA G. VASQUEZ
Records Officer
Office of the Corporate Secretary
28 December 2020





SELF-DECLARATION OF SURVIVING SPOUSE (on Non-Marriage/Non-Cohabitation)

Form No. _____

I, _____ (name of widow/widower), of legal age, Filipino, and a resident of _____, hereby state the following:

1. I have not remarried, cohabited with another person, or otherwise engaged in a common-law relationship since the death of my spouse, _____ (name of spouse);
2. I acknowledge that, if granted, my entitlement to survivorship benefit from the GSIS will be automatically and permanently terminated the moment I re-marry, co-habit with any person, or engage in a common-law relationship;
3. I undertake to reimburse/return to the GSIS, without need of demand or judicial action, all survivorship benefits that I may unduly receive after my entitlement thereto is terminated as stated above; and
4. I further acknowledge that any misrepresentation, concealment and inaccurate and untruthful statement on my part shall be a ground for criminal and civil action against me.

Name and Signature of Legal Surviving Spouse

Pensioner's Thumb mark
(if unable to affix signature)

Printed Name and Signature of Witnesses to the Thumbmark:
(Both witnesses must provide photocopy of 2 valid government-issued IDs)

1. _____

2. _____

Date

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[Signature]
M.A. RUTH ALMIRA G. VASQUEZ
Records Officer
Office of the Corporate Secretary
28 December 2020





GSIS

APIR INTERVIEW FORM

Date _____

Time _____

☐ OLD AGE PENSION

☐ SURVIVORSHIP

☐ DEPENDENT

☐ MILESTONE

Details:

Last Name	First Name	Middle Name
Date of Birth _____		
Duration of Video Call _____		
(Close-up photo of pensioner here)	UMID/eCard or ID # 1	
	ID # 2	

GSIS BP Number _____

UMID/ eCard Number (if available) _____

Expiration Date (if with eCard) _____

Other Identification Cards Presented

1. _____

2. _____

Pensioner was assisted by _____

Relationship to pensioner _____

CERTIFICATION

This is to certify that the information given above are true and correct based on the manual validation/video call I conducted. With this, I am favorably endorsing the commencement of pension.

NAME OF INTERVIEWER HERE

Department/Branch _____

CERTIFIED TRUE COPY

M.A. RUTH ALMIRA G. VASQUEZ

Records Officer

Office of the Corporate Secretary

28 December 2020





GSIS

PENSIONER VISIT REPORT

Date _____ Time of Visit _____

PENSION TYPE ☐ OLD AGE ☐ SURVIVORSHIP ☐ DISABILITY ☐ DEPENDENT ☐ MILESTONEVENUE OF VISIT ☐ Home ☐ Hospital ☐ Hospice Others _____

Details of Pensioner:

Last Name		First Name		Middle Name
Residential Address (House No., Street, Barangay, City/Municipality, Province/State and Zip Code)				
Business Partner No.	Date of Birth (mm/dd/yyyy)	Age	Gender	Civil Status
Contact No. (Landline)	Mobile Phone No.		E-mail address	
(Photo of pensioner here)	(Photo of pensioner with GSIS Personnel and Guardian or Representative)	UMID/eCard or ID # 1	UMID/eCard or ID # 2	

Signature of Pensioner _____

Pensioner was assisted by (complete name): _____

Relationship to Pensioner: _____

Pensioner's Thumb mark (if unable to affix signature) _____

Signature: _____

GSIS PERSONNEL INVESTIGATION REPORT

16 Digit eCard Plus No. _____ GSIS ID No. _____

☐ Moved to a new location/address, with details below:☐ Deceased as of _____ (with death certificate attached: Yes ____ No ____)☐ Whereabouts/Current Location is currently unknown

Reported by _____ Relationship: _____

GSIS PERSONNEL CERTIFICATION

This is to certify that I have:

- ☐ Conducted the visit to the pensioner for the purpose indicated above and validated his/her identity
- ☐ Personally enrolled the pensioner through mobile enrolment
- ☐ Delivered the GSIS UMID eCard/eCard Plus to the pensioner

I further certify that the information herein provided were personally undertaken by the undersigned and were freely given by the pensioner or by the pensioner's relative/guardian/representative.

CERTIFIED TRUE COPY

(Name and Signature of GSIS Personnel)

M. RUTH ALMIRA G. VASQUEZ

Records Officer
Office of the Corporate Secretary

28 December 2020

