MEMORANDUM CIRCULAR NO. 04
Series of 2019

TITLE: OMNIBUS GUIDELINES IN THE IMPLEMENTATION OF THE SOCIAL PENSION FOR INDIGENT SENIOR CITIZENS

I. RATIONALE

As of August 1, 2015, the Philippines had a total population of 100,981,437 based on the 2015 Census of Population (POPCEN 2015). Out of that population, 7.4% or 7,534,306 comprised the senior citizens (SCs). The percentage of poverty among the basic sectors is 13.2% for SCs. The Autonomous Region for Muslim Mindanao (ARMM) posted the highest poverty incidence for the sector which is at 38.5%. The number of senior citizens is expected to hit 9.5 million by year 2020.

The Philippine Government has made great strides in promoting the welfare of its people and has ensured the continued participation in the development by legislating national policies in response to the emerging needs of the Filipino senior citizens.

Republic Act No. 9994 or the “Expanded Senior Citizens Act of 2010” institutionalizes social protection to senior citizens by providing additional government assistance through Social Pension for Indigent Senior Citizens (SPISC). In this program, indigent senior citizens are entitled to a monthly stipend which aims to augment the daily subsistence and other medical needs of the beneficiaries.

The Department of Social Welfare and Development (DSWD), as the lead agency in social welfare and development, implements the SPISC in the country since year 2011 through the DSWD Field Offices (FOs) using the most cost-effective and efficient mode of payment to deliver the stipend to the beneficiaries every quarter.

During the implementation of the program, the DSWD issued various guidelines, memoranda and administrative orders to respond to the issues and concerns encountered. Thus, in order to provide a unified direction to DSWD FOs in partnership with the Local Government Units (LGUs) to ensure an effective and efficient implementation of the program, this Omnibus Guidelines is hereby formulated.

II. LEGAL BASES

A. International Commitments as a State party to the following:

Sustainable Development Goals
Goal 1: End poverty in all its forms everywhere
Goal 3: Ensure healthy lives and promote well-being for all at all ages

Madrid International Plan of Action on Ageing No. 52
Objective 1: Promotion of programmes to enable all workers to acquire basic social protection / social security, including where applicable, pensions, disability insurance and health benefits.
B. National Laws

Section 11, Article XIII, 1987 Philippine Constitution
"The State shall adopt an integrated and comprehensive approach to health development which shall endeavour to make essential goods, health and other social services available to all people at affordable cost. There shall be priority for the needs of the underprivileged, sick, elderly, disabled, women and children. The State shall endeavour to provide free medical care to paupers”.

Section 4, Article XV, 1987 Philippine Constitution
"The family has the duty to care for its elderly members but the State may also do so through just programs of social security”.

Section 1, Article 20, Rule V, Implementing Rules and Regulations of Republic Act 9994
Pursuant to the eligibility criteria as may be determined by the DSWD, indigent senior citizens shall be entitled to a monthly stipend amounting to Five Hundred Pesos (Php500.00) to augment the daily subsistence and other medical needs of senior citizens. The grant of social pension shall be subject to a review every two (2) years by Congress, in consultation with the DSWD within three (3) months after convening the Congress.

Philippine Plan of Action for Senior Citizens 2012-2016
Promotion of active ageing through social protection and support for the rights and welfare of senior citizens and their empowerment

C. DSWD Issuances / Guidelines

The guidelines will provide clear arrangements on the responsibility of every concerned agency to ensure the effective and efficient implementation of the Social Pension Program.

The DSWD National Household Targeting System for Poverty Reduction (NHTS-PR) data shall be the basis in determining the age and economic status of the potential beneficiaries.

Administrative Order No. 04, series of 2012 “Procedure in Processing Replacements for Beneficiaries of the Social Pension”
In order to maximize the services due to qualified senior citizens, this procedure was formulated to define the system of replacing the delisted and terminated cases of senior citizens with the validated qualified senior citizens from LGU and from NHTS-PR data.

On the two-year implementation of the program, it has encountered several issues and gaps such as the release of stipend to the beneficiaries through cash pay-out which posed risks both to the personnel and beneficiaries. Hence, this prompted to consider other modes of payment that would address such concern.
Administrative Order No. 04, series of 2014 “Amendment to Administrative Order No. 15 series of 2010 otherwise known as the Guidelines on the Implementation of the Social Pension for Indigent Senior Citizens”
Considering the three (3) years of Social Pension implementation, there is a need to amend some of the existing provisions due to the special provision under the General Appropriations Act (GAA) for CY 2014.

Memorandum Circular No. 25, series of 2014 “Supplemental Guidelines to Administrative Order No. 07 series of 2013 for the Implementation of Social Pension for Indigent Senior Citizens through Fund Transfer to LGUs and the Door-to-Door Delivery Scheme”
This document shall serve as reference on the policies and mechanics in the implementation of Social Pension through Fund Transfer to LGUs and Door-to-Door Delivery schemes by the DSWD Central Office (CO) and FOs, the LGUs and the Service Providers.

It is necessary to provide the stipend earlier at the start of the quarter so that beneficiaries can use it as needed to promote their best welfare and interest.

It is further necessary to provide the stipend at the start of the quarter to utilize the money for the succeeding days for their basic and present-day needs.

Memorandum Circular No. 02, series of 2016 “Amendment to Memorandum Circular No. 17 series of 2015 re: Release of Stipend to the Replacement Beneficiary”
The release of stipend for the replacement beneficiary shall take effect within the quarter. Provided, that the liquidation reports for the given quarter shall be submitted on time and the supporting documents of the former beneficiary and the replacement beneficiary are complied with. The replacement-beneficiary should be included in the updated list of unserved indigent senior citizens approved and signed by the DSWD Regional Director (RD).

III. DESCRIPTION OF THE PROGRAM

The SPISC is the provision of monthly stipend amounting to Five Hundred Pesos (Php500.00) to augment the daily subsistence and other medical needs of indigent senior citizens. This is in line with the fulfillment of the obligation of the government to the most vulnerable sector through social protection, and for the full implementation of Republic Act No. 9994 or the Expanded Senior Citizens Act of 2010”.

The stipend is received by a beneficiary on a semestral basis, using the most cost-effective and efficient payment modality, such as but not limited to direct payment to the beneficiary through cash advance by a designated Special Disbursing Officer (SDO), door-to-door delivery scheme or use of cash card.

Moreover, the guidelines seek to emphasize that the indigent senior citizen acquires vested right to receive the stipend from the start of every semester as the law provides that the indigent senior citizen shall receive his/her monthly pension. Due to the implementation procedure and processing of requirements however, it is hereby recognized that there could be instances when the indigent senior citizen may die before he/she can actually receive the stipend. In this case, the stipend may be claimed by the nearest kin of the deceased indigent senior citizen or his/her authorized
representative. The same will be applied when, for a justifiable reason, a social pensioner cannot personally claim his/her stipend due to illness or being bedridden among others.

IV. SCOPE AND COVERAGE

The SPISC will be implemented nationwide, even in the Administrative Region in Muslim Mindanao (ARMM). The number of beneficiaries will be based on the seventeen (17) FOs’ including DSWD-ARMM’s validated list of indigent senior citizens.

The program will apply the following eligibility criteria:

Sixty (60) years old and above senior citizens who are:

- Frail, sickly or with disability;
- No pension from the Government Service Insurance System (GSIS), Social Security System (SSS), Philippine Veterans Affairs Office (PVAO), Armed Forces and Police Mutual Benefit Association, Inc. (AFPMBAI) or any other insurance company;
- No permanent source of income; and
- No regular support from family or relatives for his/her basic needs.

V. OBJECTIVES

General

To improve the living condition of senior citizens.

Specific

1. To augment his/her capacity to meet his/her daily subsistence and medical requirements;
2. To reduce incidence of hunger among indigent senior citizens; and
3. To protect him/her from neglect, abuse or deprivation.

VI. DEFINITION OF TERMS

For purposes of herein guidelines, the following terms are defined as follows:

AUTHORIZED GOVERNMENT DEPOSITORY BANK (AGDB) refers to a bank allowed by law which will serve as a service provider in distributing the social pension stipend thru cash card.

AUTHORIZED REPRESENTATIVE refers to the person related by blood or affinity or an unrelated person authorized by the social pensioner to receive his/her stipend due to reasons such as: bedridden/weak physical condition, among others; as evidenced by a certification signed by the Punong Barangay and the concerned relative or neighbour indicating that he/she is the one who is taking care the senior citizen. The authorized representative should be registered with the C/MSWDO or OSCA and in the DSWD FO database.

BENEFICIARY refers to a qualified indigent senior citizen receiving social pension based on the criteria for inclusion in the Social Pension program.

CASH CARD refers to an electronic debit card that utilizes the stored value system and like the ATM Card, operates on magnetic stripe technology with PIN-based protocol.

DELISTING refers to the process of removing a beneficiary from the list of senior citizens receiving social pension due to death, transfer of residence, receiving pension from GSIS, SSS, PVAO, AFPMBAI
or any other insurance company, cannot be located or for any disqualifying reason/s based on the eligibility criteria of the program.

**DOOR-TO-DOOR DELIVERY** refers to the scheme of giving the social pension to the senior citizen in cash, at his/her residence thru the authorized service provider.

**ELIGIBILITY ASSESSMENT** refers to the conduct of interview and home visit to the identified senior citizens who were referred or endorsed by the Senior Citizens Organizations (SCOs), Office of the Senior Citizens Affairs (OSCA) Head and City / Municipal Social Welfare and Development Office (C/MSWDO). The assessment shall be conducted using the General Intake Sheet (GIS) to be administered by the C/MSWDO Social Worker to determine if the senior citizen is qualified for social pension based on eligibility criteria of the program.

**GENERAL INTAKE SHEET (GIS)** refers to the form accomplished by the C/MSWDO Social Worker or Social Welfare Officer where the assessment of the senior citizen is written. In the GIS, the Social Worker shall indicate the assessed senior citizen’s eligibility to the program and will include stipulation on other service(s) or intervention needed by said senior citizen, if necessary.

**IDENTIFICATION OF BENEFICIARIES** refers to the process of selection of potential beneficiaries based on the eligibility criteria of the program by the SCOs, OSCA Head and C/MSWDO.

**INDIGENT SENIOR CITIZEN** refers to a senior citizen who is frail, sickly or with disability, and without pension or permanent source of income, or regular support from his/her relatives to meet his/her basic needs.

**LOCAL SOCIAL WELFARE AND DEVELOPMENT OFFICE (LSWDO)** refers to the office of the Local Government Unit (LGU) which is responsible in the implementation of social protection programs in the LGU, including direct services for specific sectors like the senior citizens in the locality.

**OFFICE OF SENIOR CITIZENS AFFAIRS (OSCA)** refers to the office established under Republic Act No. 9994, and headed by a senior citizen, primarily tasked to assist in implementing the Expanded Senior Citizens Act, and keeps records of senior citizens; manages issuance of senior citizens’ ID and profiling of all senior citizens in their locality.

**PERMANENT SOURCE OF INCOME** refers to the financial remuneration received monthly by the senior citizen from businesses or income from rentals, investments and other productive activities undertaken by the senior citizen.

**REGULAR SUPPORT FROM FAMILY OR RELATIVES** refers to the monthly material and/or financial support provided by family members or relatives to the senior citizen including family members working abroad, within the first to fourth degree of consanguinity.

**REPLACEMENT** refers to the substitute beneficiary to a delisted beneficiary. The replacement beneficiary shall be drawn from the master list of waitlisted / unserved senior citizen with the following criteria: He/she is in the masterlist of the previous/oldest waitlisted senior citizens; permanent resident of the same barangay and currently validated as eligible for social pension.

**SENIOR CITIZENS ORGANIZATION** refers to a legitimate people’s organization in every barangay/city/municipality that will assist the OSCA and C/MSWDO in the identification and validation of a potential beneficiary.

**SERVICE PROVIDER** refers to any government/private institution that is capable to deliver the social pension thru the following scheme: door-to-door (cash payment directly to the residence of the beneficiary), cash card, or Over-the-Counter (OTC).
SOCIAL PENSION refers to the monthly stipend amounting to Five Hundred Pesos (Php500.00) to augment the daily subsistence and other medical needs of indigent senior citizens, subject to a review every two (2) years by Congress, in consultation with the DSWD, as prescribed by R.A. 9994.

VALIDATION refers to the process of establishing the facts or information or gathering proofs or evidence on the information provided by the interviewer during the assessment of the eligibility of the senior citizen to the program.

WAITLISTED refers to the list of validated senior citizens who have been assessed and validated as qualified for social pension but are not yet receiving such, as they are not included in the target for the year. The list of waitlisted senior citizens shall be the source for the replacement beneficiaries.

VII. ORGANIZATIONAL STRUCTURE

1. At the Central Office (CO) level: Sectoral Programs Division, Program Management Bureau (PMB)

The Social Pension Unit at the CO shall consists of the following staff:

- Social Welfare Officer IV
- Social Welfare Officer / Project Development Officer III
- Administrative Officer V
- Statistician II
- Administrative Assistant II

2. At the Field Office (FO) level: Social Pension Program Management Office (SPPMO)

The SPPMO shall consists of the following staff:

- Social Welfare Officer II
- Administrative Officer II/ Finance Officer
- Administrative Assistant II
- Social Welfare Officer / Project Development Officer I
- Senior Bookkeeper
- Administrative Aide IV

VIII. GENERAL POLICIES

A. Identification of Potential Beneficiaries

1. The Barangay Senior Citizens Association (BSCA) may recommend or submit a list of potential beneficiary senior citizen to the OSCA Head or at the City/ Municipal Social Welfare Development Office (C/MSWDO) with the filled-out Social Pension Application Form (Annex 1). The OSCA Head shall consolidate the list of all potential beneficiaries certified by the LSWDO for submission to the DSWD Field Office (FO). The social pension shall be provided to an individual who is assessed as qualified indigent senior citizen. In case of qualified husband and wife, both can be considered beneficiaries at the same time.

2. Referrals and walk-in clients or those senior citizens who are not included in the endorsed list of BSCA shall be referred to the concerned OSCA or DSWD FO through the SPPMO for assessment. Same shall apply for walk-in clients from the DSWD FO.
B. Assessment and Validation of Potential Beneficiaries

1. The DSWD FO shall cross-match the consolidated list submitted by the OSCA Head with the available data from SSS, GSIS, PVAO, among others, to verify if the potential beneficiary is an existing pensioner of the insurance agencies.

2. To facilitate the foregoing, the DSWD CO may coordinate and enter into a Memorandum of Agreement (MOA) with the concerned insurance agencies and secure their updated list of pensioners to be included in the SPIS as basis of the DSWD FO in the validation / cross-matching of beneficiaries. This will not preclude the initiative of the FOs to enter into an agreement with their counterpart AGDB branches in their areas of operation provided that

3. The DSWD FO's Social Worker or Focal Person shall take the lead in the conduct of assessment to the list of potential beneficiaries using the General Intake Sheet (GIS) (Annex 2). In the assessment process, the potential beneficiary shall present his/her OSCA ID or Birth Certificate. In case that the said ID or document is not available, he/she may present any valid ID, either government-issued ID or his/her federation/association ID, indicating his/her date of birth.

Likewise, the DSWD FO shall validate the address indicated in the OSCA ID or other valid IDs of the senior citizen to confirm his/her current residency and exact address. The DSWD FO may coordinate with the Punong Barangay or other Official/s to confirm such, by issuing a barangay certificate of residency.

4. The DSWD FO's Social Worker or Focal Person shall prepare the assessment report that will be reviewed by the Protective Services Unit (PSU) Head and will be recommended to the Regional Director for approval. The assessment report shall be the basis of the final list of beneficiaries in every city/municipality.

5. The DSWD FO shall endorse the approved final list of beneficiaries to the City/Municipal Mayor through the OSCA Head and LSWDO for reference. Simultaneously, the final list of beneficiaries shall then be encoded in the Social Pension Information System (SPIS).

6. In case of inconsistencies or alterations in the list, such shall be reported to the DSWD FO for the conduct of further assessment and verification. Findings shall be discussed with the OSCA Head and LSWDO for information.

C. Notification of the Social Pension Beneficiaries

1. The OSCA Head will immediately inform the indigent senior citizen and/or his/her family through a written notification on his/her approval as Social Pension beneficiary based on the approved list by the DSWD FO. The OSCA Head may also coordinate with the respective SCO Presidents to assist in the dissemination of notice to the qualified beneficiaries.

2. The DSWD FO shall conduct a brief orientation to the beneficiaries and their authorized representative during pay-out to discuss the procedures in the availing of the Social Pension. It shall be highlighted during the orientation that Social Pension is a Program of the National Government.
D. Provision of Stipend to the Beneficiaries

1. The DSWD FO will inform the City/Municipal Mayor through the OSCA Head and LSWDO of the schedule of the pay-out. The OSCA Head shall then inform the beneficiaries of the date and venue of the pay-out.

2. The release of the monthly social pension at Five Hundred Pesos (Php500.00) per beneficiary will be done every six (6) months or Three Thousand Pesos (Php3,000.00) per semester.

3. The social pension beneficiary shall present his/her OSCA ID or any valid government-issued ID/ federation ID indicating the date of birth, in claiming the stipend during pay-out.

4. In case the stipend will be claimed by an authorized representative, he/she shall present the following:

   (a) original and photocopy of his/her valid ID or valid certification;
   (b) social pensioner’s valid ID; and
   (c) certification letter from the social pensioner indicating the name of the authorized representative and the reason/s of inability to personally claim his/her stipend.

Only the authorized representative identified by the beneficiary and registered with DSWD FO shall be allowed to claim the stipend. It is hereby emphasized that each eligible senior citizen is required to identify at least three (3) authorized representatives, in succession, whose names and other pertinent data of identification shall be in the Social Pension database (SPIS).

In case of death or non-appearance of the three (3) authorized representatives, per the succession indicated in the database, the FO will locate and identify another representative in coordination with the LSWDO and/or OSCA or as maybe required by the AGDB.

If in case a representative, other than the three listed in the database, is authorized, the beneficiary shall inform the DSWD FO thereof, prior to the scheduled pay-out.

5. In case the beneficiary died on any day within the semester, he/she shall still be entitled to receive the full amount of stipend for the semester to be given to the authorized representative. The authorized representative can be allowed to claim the stipend in behalf of the deceased beneficiary within the semester after he/she submits the following: (a) death certificate of the beneficiary and (b) photocopy of his/her ID. The deceased beneficiary shall then be delisted from the payroll for the succeeding semester.

6. The release of stipend for the replacement beneficiary shall take effect on the following semester. The supporting documents of the replacement beneficiary and the endorsement of the LSWDO shall be the basis in preparing the master list, validated DSWD FO, which will include the name of said beneficiary.

E. Delisting/Changing of Social Pension Beneficiaries

Social Pension beneficiaries will be delisted based on the following grounds with supporting documents, subject to replacement:

<table>
<thead>
<tr>
<th>Grounds</th>
<th>Supporting Documents</th>
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</thead>
<tbody>
<tr>
<td>Death of the beneficiary</td>
<td>Original or certified true copy of the Death Certificate</td>
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<td></td>
<td>issued by the Office of the Local Civil Registrar</td>
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<tr>
<td>Certification from the Punong Barangay or Tribal Chieftain attesting to the facts of death of the beneficiary.</td>
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<tr>
<td>Transfer of residence by the beneficiary shall result to the transfer of the name of the beneficiary in his/her new residence.</td>
<td>Barangay Certification confirming the transfer of the beneficiary and permanent residence in his/her new address.</td>
</tr>
<tr>
<td>A beneficiary who cannot be located in his/her last known address within the semester or during the period of validation or home visit by the DSWD FO.</td>
<td>Certification from the Barangay confirming that the senior citizen beneficiary cannot be located in his last known address within the semester or during the period of validation. The basis shall be the validation or home visit(s) conducted by the DSWD FO, provided that paragraph (F)(6) of item VIII of the guidelines has been complied with.</td>
</tr>
<tr>
<td>Receiving pension from GSIS, SSS, Armed Forces and Police Mutual Benefit Association, Inc. (AFPMBAI) or any other insurance company.</td>
<td>Data on the results of cross-matching of the list of social pensioners with the list of GSIS, SSS, AFPMBAI pensioners and confirmation by the FO of its validation.</td>
</tr>
<tr>
<td>Having a regular income/financial support from family or relatives.</td>
<td>Assessment report from the DSWD FO indicating such findings and recommendation for delisting.</td>
</tr>
<tr>
<td>Absence for a semestral pay-out shall cause suspension of the right of the beneficiary to receive his/her stipend, if the same remains unclaimed within six (6) months.</td>
<td>Certification from the DSWD FO validating the absence of the beneficiary for one semestral pay-out, after conducting a home visit and validation, and indicating the reasons for the absence, subject to compliance with paragraph (F)(6) of item VIII of the guidelines has been complied with.</td>
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**F. Replacement of the Delisted Social Pension Beneficiaries**

1. Replacement shall be taken from the validated waiting list to be generated by the DSWD-FO, based on the master list of the updated qualified senior citizens who are still unserved. It is presumed that the waiting list include only those who are qualified to be beneficiaries of the program.

2. Priorities for replacement are those coming from the same barangay within the city/municipality. Should there be no more qualified indigent senior citizens from where the delisted senior citizen came, the DSWD FO shall consider the waitlisted from another barangay within the city/municipality subject to the assessment and approval of the Regional Director.

3. In case of deceased beneficiaries, stipend shall be released to the authorized representative as indicated in the pertinent provisions of herein guidelines.
4. In case of beneficiaries who transferred residence from one region to another region, he/she can still claim his/her stipend due for the semester of his/her stay in the region where he/she came from. The DSWD FO concerned where the beneficiary came from, should coordinate in writing with the DSWD FO where the beneficiary transferred or will transfer to ensure that his/her inclusion in the program shall be immediately considered to facilitate continuity of his/her stipend. Once the former region has received confirmation from the receiving region, the former region shall then delist the name of the social pensioner from its database.

5. In case of beneficiaries whose address cannot be located within the semester, the Barangay Senior Citizens Association (BSCA) President may assist the OSCA Head in locating the beneficiary and provide report to the DSWD FO the correct or complete address of the beneficiary.

6. For the beneficiaries who are absent during a pay-out/delivery of payment for one (1) semester, the concerned DSWD FO will conduct home visit(s) within that semester to determine the status and reason for the absence of the beneficiary. Once visited and validated, the DSWD FO may facilitate payment of his/her stipend.

Provided that, in case of a beneficiary who cannot be located in his/her last known address after the conduct of home visit(s), the DSWD FO shall apprise the concerned Punong Barangay or any of its official of said information. The Barangay may validate the information and may assist in locating the beneficiary. If the beneficiary is not found, delisting/ changing process may be initiated subject to the applicable requirement as set forth in paragraph (E).

IX. DELIVERY SCHEMES ON SOCIAL PENSION

As stipulated in the GAA, the DSWD shall ensure that the stipend shall be given directly to senior-citizen beneficiaries. In delivering the stipend to the social pensioners, the DSWD must guarantee that the most cost-effective and efficient modality for the distribution of the stipend will be employed, subject to the assessment of the FO and approval of the Regional Director. Any of the three (3) delivery schemes, discussed below, may be utilized or in case all shall not be feasible, the FO must identify another modality/ scheme which may be effective provided the same is allowable under existing rules and regulations. In all cases, the choice of the applicable delivery scheme may vary periodically or may be combined considering the prevailing status, condition and geographical condition of the senior citizen beneficiaries vis-à-vis the local situations, issuances or directives of the Secretary.

The following shall be guide on how each modality/scheme shall be implemented:

A. Cash Advance by a Designated Special Disbursing Officer (SDO) – The stipend will be given directly to the beneficiary through cash pay-out by the SDO of the DSWD FO.

1. The DSWD FO Regional Director shall assign SDOs for Social Pension.

2. The DSWD FO thru the SPPMO will prepare the payroll based on the approved list of beneficiaries by the Regional Director per city/municipality.

3. The FO thru the Finance Unit will validate the total amount of payroll with a summary of beneficiaries per city/municipality and will issue the check in the name of the bonded SDO.
4. The SDO will encash the check for the payment of stipend to individual social pensioners per city/municipality.

5. The SDO in coordination with the SPPMO will pay the identified beneficiaries and shall ensure that the payroll is signed by the beneficiaries duly witnessed by the OSCA, LSWDO or the Focal Person.

6. The SDO will prepare the liquidation report for the cash advance subject to the existing COA rules and regulations.

B. Door-to-Door Delivery Scheme – Through the engagement with the service provider duly accredited by the Bangko Sentral ng Pilipinas (BSP) and whose services are procured by the FO in accordance with existing laws, the stipend will be delivered directly to the residence of the beneficiary.

1. The DSWD FO shall identify the areas for the door-to-door delivery of social pension.

2. The DSWD FO shall facilitate decentralized bidding following the provisions indicated in RA 9184 for the procurement of service providers who will conduct the door-to-door delivery of Social Pension stipend.

3. The DSWD FO and the winning service provider shall enter into a contract represented by the DSWD RD and the Service Provider’s Authorized Official.

4. The service provider shall open an account specifically for the Social Pension door-to-door delivery.

5. The service provider shall pick up the checks, payroll list, and pre-numbered Acknowledgement Receipt (AR) from the DSWD FO five (5) days before the scheduled payout and shall issue Official Receipt/Acknowledging Receipt corresponding to the prefunded amount.

6. The service provider shall deliver the cash grant directly to the residence/given address of the beneficiaries amounting to Three Thousand Pesos (Php3,000.00) within the period agreed upon in the contract stated in the foregoing.

7. The service provider shall request for beneficiaries’ OSCA ID or any other valid IDs either government-issued or federation/association before giving the cash grants to ensure the legitimacy of the recipients.

8. In cases of unsuccessful delivery due to absence of the beneficiaries at the time of payment, a notice shall be given to the authorized representative of beneficiaries (family member/neighbour) informing that the service provider shall redeliver the grants to the house of the social pensioner within 14 calendar days upon notification.

Any unpaid stipend after the lapse of said 14-day holding period shall be refunded to the DSWD FO for liquidation.

9. In case of death of the beneficiary at the time of payment/delivery, DSWD FO shall facilitate the distribution of the full amount of stipend for the semester to the nearest kin of the beneficiary.
10. The service provider shall submit the following liquidation documents and shall refund the unused balances to DSWD FO on or before 30th day of the 1st month of the next semester:

10.1. Duly accomplished Acknowledgement Receipt (Annex 3)
10.2. List of paid beneficiaries (Annex 4) and unpaid beneficiaries (Annex 5)
10.3. Certificate of payment duly signed by the service provider’s authorized officials (Annex 6);
10.4. Picture of beneficiaries receiving the stipend with proof of date; and
10.5. Picture of OSCA ID or any other valid ID presented

11. No subsequent prefunding or processing of funds unless the previous fund transfer has been fully liquidated.

C. Cash Card thru Authorized Government Depository Bank (AGDB) – Through the engagement with an AGDB, the amount of stipend will be credited to the cash card of the beneficiary.

The DSWD CO shall facilitate the centralized procurement process for the identification of an AGDB and shall enter into a MOA with the Head Office of the AGDB and shall prepare the operational guidelines for the cash card implementation in all regions.

X. INSTITUTIONAL ARRANGEMENTS

A. Program Management Bureau (PMB)

Per Administrative Order No. 1 series of 2019 (Management Reorganization of the DSWD Central Office), the Social Pension program is lodged under the Sectoral Programs Division of PMB which shall undertake the following:

1. Ensure the inclusion of the funds required for social pension in the GAA;
2. Provide technical assistance and monitoring to the SPPMO staff (FO);
3. Maintain and update the list of senior citizens in the SPIS based on the submission of Field Offices including the official waiting list;
4. Maintain the Social Pensioner national database and webpage;
5. Facilitate engagement with an AGDB for the cash card or other pay-out scheme at the national level;
6. Develop the Grievance Redress, Update and Monitoring and Evaluation systems for the implementation of the social pension;
7. Prepare the regular national implementation report on the social pension;
8. Submit a budget proposal for the annual administrative and operational cost for the implementation of the social pension;
9. Conduct social preparation, trainings and advocacy activities;
10. Develop a three-to-five-year management plan and information education and communication strategy for the social pension; and
11. Maintain, update and monitor the fund utilization status of the Social Pension program.

B. DSWD Field Offices

1. Ensure the efficient, effective, economic and ethical implementation of the social pension program in their respective region;
2. Conduct a validation / an assessment of the senior citizens referred by individuals, groups or organizations for potential inclusion in the program;
3. Provide technical assistance and supervision to the LSWDO, OSCA and other LGU implementers regarding the social pension program;
4. Maintain and update the list of beneficiaries including the waiting list of indigent senior citizens quarterly or as necessary, at the social pension regional database and website;
5. Execute the provisions of the MOA with AGDB, as stipulated, at the regional level;
6. Handle grievance and respond to issues/concerns elevated by the LSWDO, OSCA or any individual;
7. Prepare the monthly regional Physical and Financial Accomplishment Report and Quarterly Narrative Report on the social pension implementation and ensure updating and monitoring of fund utilization status regularly;
8. Conduct spot-checking on the status of social pensioners;
9. Submit comments / inputs and recommendations to guidelines and policies that are proposed for the program or are being implemented in relation to the program implementation;
10. Establish partnership / linkages with inter-agency bodies / Senior Citizens Organizations (SCO) in the implementation of the program;
11. Conduct annual Program Implementation Review (PIR) and periodic Program Review and Evaluation (PRE); and
12. The DSWD FO-SPPMO shall maintain and update the database of the validated list of social pensioners vis-à-vis the master list of potential beneficiaries using the SPIS.

C. Local Government Units (Province / City / Municipality)

1. Local Chief Executives (LCEs)
   1.1. Supervise the OSCA;
   1.2. Advocate for the provision of LGU counterpart thru the utilization of at least 1% OP/PWD fund for the social pension implementation;
   1.3. Enact local resolution in support of the social pension program; and
   1.4. Assign a registered Social Worker or qualified staff who shall be the focal person for the social pension program.

   2.1. Recommend to the Sangguniang Panlalawigan resolution supporting the implementation of the social pension program; and
   2.2. Provide augmentation to the LGUs as necessary in the implementation of social pension program.

3. City/Municipal Social Welfare and Development Office (C/MSWDO)
   3.1. Conduct orientation to social pension beneficiaries and their families;
   3.2. Certify the endorsement of the list of potential beneficiaries in every barangay and city/municipality;
   3.3. Ensure the monitoring and evaluation of the social pension in their city/municipality;
   3.4. Assist in the conduct of pay-out based on the schedule of DSWD FO; and
   3.5. Act as chair in the grievance committee and respond to complaints and queries.
   3.6. Recommend to the Sangguniang Bayan/ Sangguniang Panglungsod resolution supporting the implementation of the social pension;
   3.7. Provide augmentation to the Barangays in coordination with the Provincial Government as necessary in the implementation of Social Pension program.

4. Office of the Senior Citizens Affairs (OSCA)
   4.1. Maintain the list/profile of all senior citizens in the city/municipality; update and ensure issuance of the OSCA ID to all 60 years old and above;
4.2. Facilitate the application of potential beneficiaries by assisting in filling-out the Social Pension Application Form;
4.3. Consolidate and endorse the list of potential beneficiaries together with the filled-out Social Pension Form to the DSWD FO;
4.4. Advocate for the allocation of funds supporting the Social Pension implementation in their respective city/municipality; and
4.5. Act as member in the grievance committee and respond to complaints and queries in coordination with the City/Municipal Social Welfare Development Office (C/MSWDO).

D. Senior Citizens Organizations (SCOs)

1. Assist in the identification of the potential beneficiaries and endorse to the OSCA Head;
2. Attend meetings as requested by the DSWD FO;
3. Assist the senior citizens in securing OSCA ID; and
4. Elevate to the LSWDO the grievance/complaints received from senior citizens, individuals and other sources.

XI. REPORTING

<table>
<thead>
<tr>
<th>Type of Report</th>
<th>Prepared by</th>
<th>Submitted to</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Potential List of Beneficiary</td>
<td>OSCA and LSWDO</td>
<td>DSWD Field Office – SPPMO</td>
<td>Quarterly</td>
</tr>
<tr>
<td>Liquidation Report of Service Provider</td>
<td>Service Provider</td>
<td>DSWD Field Office – Finance Unit</td>
<td>May – 1st semester, November – 2nd semester</td>
</tr>
<tr>
<td>Physical Accomplishment Report</td>
<td>RSPU Finance Officer and Social Welfare Officer II</td>
<td>DSWD Central Office (PMB)</td>
<td>Quarterly - 25th day of the 3rd month within the semester</td>
</tr>
<tr>
<td>Fund Utilization Report</td>
<td>Administrative Officer II</td>
<td>DSWD Central Office (FMS &amp; PMB)</td>
<td>Monthly - 10th day of the succeeding month</td>
</tr>
<tr>
<td>Quarterly Narrative Report</td>
<td>Social Welfare Officer II</td>
<td>DSWD Central Office (PMB)</td>
<td>10th day of the 1st month of the succeeding semester</td>
</tr>
</tbody>
</table>

XII. GRIEVANCE

In attending to queries and complaints, the following should be observed:
- A committee shall be created and chaired by the Local Social Welfare Development Office (LSWDO) composed of the OSCA Head and SCO officers who will act on complaints received from any individual or institution;
- A written feedback on the action/s taken by the committee will be sent to the individual or agency who filed the complaint, copy furnished the DSWD FO-SPPMO for information and monitoring;
- Complaints not resolved by the committee shall be elevated to the FO-SPPMO for resolution. For cases not resolved at the FO level, complaints shall be submitted to the DSWD-Central Office thru the PMB for further assessment and appropriate action.
XIII. MONITORING AND EVALUATION

1. The Social Welfare Officer (SWO) / Project Development Officer (PDO) of the FO-SPPMO assigned in the province shall conduct a quarterly monitoring and spot checking to the beneficiaries particularly in the areas of:
   a. Unclaimed Monthly stipend;
   b. Status of a Social Pensioner; and
   c. Utilization of stipend.

2. The DSWD-CO shall conduct a quarterly visit to DSWD FO-SPPMO to provide technical assistance in line with the implementation of the program. Participation in the consultation dialogue/program implementation review, special meetings, payout and monitoring with the LGU partners can be among the activities in the FOs.

3. The DSWD-PMB shall assess the conducted pay-outs and other Social Pension mechanisms at the last quarter of every year;

4. The DSWD-CO shall conduct an evaluation of the Social Pension Program every two years or as it may deem necessary.

XIV. EFFECTIVITY

This Memorandum Circular shall take effect immediately and all other previously issued issuances inconsistent with this Circular is hereby revoked.

Issued in Quezon City this 31st day of January, 2019.

[Signature]
ROLANDO JOSELITO D. BAUTISTA
Secretary

Certify True Copy:

[Signature]
MYRNA H. REYES
OIC-Division Chief
Records and Archives Mgt. Division
Undersecretary
For Operations

Director IV
Program Management Bureau

Chief
Sectoral Programs Division

Social Welfare Officer IV

Social Welfare Officer III

Project Development Officer III

Project Development Officer III

Administrative Officer V

Statistician II

Administrative Assistant II

Regional Director

Assistant Regional Director

Head
Protective Services Unit

Social Welfare Officer II

Finance Officer

Administrative Assistant II

Social Welfare Officer I

Project Development Officer I

Senior Bookkeeper

Administrative Aide IV
APPLICATION FORM

I. BASIC INFORMATION

Name: ____________________________ Citizenship: ____________________________
(Last Name, First Name, Middle Name)

Address: ____________________________
(House No. Street Barangay City/Municipality Province)

Age: ___________ Sex: ___________ Civil Status: ____________________________

Birthday: ___________ Birthplace: ____________________________
(Month, Date, Year)

Living Arrangement: _____ Owned _____ Living Alone _____ Living with Relatives _____ Rent

II. ECONOMIC STATUS

Pensioner? _____ Yes _____ No If yes, how much? ____________________________

Source: _____ GSIS _____ SSS _____ AFPSLAI _____ Others

Permanent Source of Income? _____ Yes _____ None If yes, from what source? ____________________________

Regular Support from Family? _____ Yes _____ No

Type of Support? ____________________________ Cash (How much and how often) ___________ In kind (specify)

III. HEALTH CONDITION

Has existing illness? _____ Yes _____ No If yes, please specify: ____________________________

Hospitalized within the last six months? _____ Yes _____ No

I hereby certify that the above-mentioned information are true and correct to the best of my knowledge.

__________________________________________
(Date Submitted)

(Applicant’s Signature over Printed Name)

Received by: ______________________________________
(Signature over Printed Name and Designation)
SOCIAL PENSION FOR INDIGENT SENIOR CITIZENS

Province

City / Municipality

GENERAL INTAKE SHEET

I. IDENTIFYING INFORMATION

Name: ___________________________ Citizenship: ___________________________

(Last Name, First Name, Middle Name)

Present Address: ___________________________

(House No. Street Barangay City/Municipality Province)

Age: _____ Sex: _____ Civil Status: _____ Religion: _____

Birthdate: ____________ Birthplace: ____________

(Month, Date, Year)

Educational Attainment: ___________________________

Affiliation/Group: _____ Listahanan (please specify household number) _______________________

_____ Pantawid Beneficiary _____ Senior Citizen Organization

_____ Indigenous People (please specify) ___________________________

_____ Others (please specify) ___________________________

ID Number: OSCA ________ TIN ________ GSIS ________

SSS ________ Philhealth ________ Others ________

II. FAMILY COMPOSITION

<table>
<thead>
<tr>
<th>Name</th>
<th>Relationship</th>
<th>Age</th>
<th>Civil Status</th>
<th>Occupation</th>
<th>Income</th>
</tr>
</thead>
</table>

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Living Arrangement: _____ Owned _____ Living Alone _____ Living with Relatives

_____ Rent _____ Others, please specify ___________________________

III. ECONOMIC STATUS

Pensioner? _____ Yes _____ No If yes, how much? ___________________________

Source: _____ GSIS _____ SSS _____ AFPSLAI _____ Others

Permanent Source of Income? _____ Yes _____ None If yes, from what source? ___________________________

Regular Support from Family? _____ Yes _____ No
Type of Support? ______________ Cash (How much and how often) ______________ In kind (specify)

IV. HEALTH CONDITION

Condition / Illness: __________________________
With maintenance: ___Yes ___No If yes, please specify: __________________________

V. ASSESSMENT

____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________

I hereby certify that the above-mentioned information are true and correct to the best of my knowledge.

Interviewed by:

DSWD FO Social Pension Staff
(Signature over Printed Name)

Date of Interview: _______________________

(Signature over Printed Name of Senior Citizen)
WARRANTY AND RELEASE FROM LIABILITY

I, the undersigned, of legal age, Filipino, hereby state:

1. I am the (nearest relative / duly authorized representative of nearest surviving living relatives) of the hereunder beneficiary of the Social Pension for Indigent Senior Citizens of the Department of Social Welfare and Development (DSWD):

   __________________________
   (Name of Beneficiary)

2. Said beneficiary died on ____________________ at ____________________.
   (Date)                               (Place of Death)

3. I hereby release and agree to hold free from any responsibility and liability the DSWD, and its officers and employees, if any other person/s should appear and represent to be the nearest relative or duly authorized representative of the nearest surviving living relatives of said beneficiary.

   __________________________
   Signature over Full Name of Claimant

   __________________________
   Address and Contact Number

   __________________________
   Date
ANNEX 5

Social Pension for Indigent Senior Citizens

UPDATED LIST OF ELIGIBLE SENIOR CITIZENS

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Address</th>
<th>Birthdate</th>
<th>Age</th>
<th>Sex</th>
<th>Amount</th>
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<tbody>
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</table>

Prepared by:  
DSWD FO Staff  
(Signature over Printed Name)

Approved by:  
DSWD Regional Director  
(Signature over Printed Name)
Social Pension for Indigent Senior Citizens

CERTIFICATE OF ELIGIBILITY

This is to certify that the following indigent senior citizens are eligible for Social Pension stipend in the amount of One Thousand Five Hundred Pesos (Php1,500.00) each covering the period of

<table>
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<th>Name</th>
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Prepared by: 

**SWO II, Social Pension**
*(Signature over Printed Name)*

Recommending Approval:

**HEAD, PROTECTIVE SERVICES UNIT**
*(Signature over Printed Name)*

Approved by:

**REGIONAL DIRECTOR**
*(Signature over Printed Name)*
LIST OF PAID BENEFICIARIES FOR SOCIAL PENSION FOR INDIGENT SENIOR CITIZENS

No. of Beneficiaries Paid: ________________  Total Amount Paid: ________________
Province Covered: ________________        Period of stipend covered: ________________

MUNICIPALITY OF (A)

<table>
<thead>
<tr>
<th>Barangay</th>
<th>Name of Beneficiaries</th>
<th>Amount Paid</th>
<th>Remarks (for deceased beneficiaries)</th>
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<tr>
<td>Sub-total</td>
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MUNICIPALITY OF (B)

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<tr>
<th>Barangay</th>
<th>Name of Beneficiaries</th>
<th>Amount Paid</th>
<th>Remarks (for deceased beneficiaries)</th>
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<tbody>
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<td>Sub-total</td>
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</table>

Prepared by: 

DSWD FO Social Pension Staff  
(Signature over Printed Name)

DSWD FO ACCOUNTANT  
(Signature over Printed Name)

Approved by:  

DSWD Regional Director  
(Signature over Printed Name)
LIST OF UNPAID BENEFICIARIES FOR SOCIAL PENSION FOR INDIGENT SENIOR CITIZENS

No. of Beneficiaries Unpaid: ___________  Total Unpaid Amount: ___________
Province Covered: ________________  Total Amount of Refund: ___________
                                                Period of stipend covered: __________

DETAILS OF UNPAID BENEFICIARIES WITH 14 DAYS HOLDING PERIOD:

MUNICIPALITY OF (A)

<table>
<thead>
<tr>
<th>Barangay</th>
<th>Name of Beneficiaries</th>
<th>Unpaid Amount</th>
<th>Status</th>
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<tbody>
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<tr>
<td>Sub-total</td>
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</tbody>
</table>

DETAILS OF UNPAID BENEFICIARIES DUE TO DEATH OR OTHER REASONS:

MUNICIPALITY OF (A)

<table>
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<tr>
<th>Barangay</th>
<th>Name of Beneficiaries</th>
<th>Unpaid Amount</th>
<th>Remarks</th>
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<tbody>
<tr>
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<td></td>
<td>(Date of Death or other reasons)</td>
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<tr>
<td>Sub-total</td>
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<td></td>
</tr>
</tbody>
</table>

Prepared by: ___________________________  Recommending Approval: ___________________________

DSWD FO Social Pension Staff  
(Signature over Printed Name)  

DSWD FO Accountant  
(Signature over Printed Name)  

Approved by: ___________________________

DSWD Regional Director  
(Signature over Printed Name)
Annex 8

Department of Social Welfare and Development

Social Pension for Indigent Senior Citizens
Field Office ______

Acknowledgement Receipt

Name: ____________________________ OSCA ID ____________________________
Address ____________________________ Household ID ____________________________
Municipality ____________________________
Province ____________________________
Gender ____________________________

(not valid if erasures or alteration are present)

Request for Payment for the
_____ Quarter of CY _______

Refer to:
Payroll for Region ______

(Indicate Barangay, Municipality, Province)
Entry #1

Petsa ____________________________

Ito ay pagpapatunay na nakatanggap ako mula sa (pangalan ng service provider) ng pera na
nagkakahalaga ng ____________________________ para sa aking pensyon sa mga buwan
ng ____________________________.

Binayaran ni: ____________________________

(Pangalan at Tagada ng Tagadala)

Tinanggap ni: ____________________________

(Pangalan at Tagada/Thumbmark ng Benefisaryo)

Sinaksahan ni: ____________________________

(Pangalan at Tagada/Thumbmark ng Authorized
Representative o Barangay Captain)

Note: In the absence of the authorized representative, the Barangay Captain may sign as witness
(Name of Service Provider)  
Address

LIST OF PAID BENEFICIARIES FOR SOCIAL PENSION FOR INDIGENT SENIOR CITIZENS

Name of Service Provider and Branch:  
No. of Beneficiaries Paid:  
Province Covered:  
Total Amount Paid:  
Period of stipend covered:  

MUNICIPALITY OF (A)

<table>
<thead>
<tr>
<th>Barangay</th>
<th>Name of Beneficiaries</th>
<th>Amount Paid</th>
<th>Remarks (for deceased beneficiaries)</th>
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</table>

Sub-total

MUNICIPALITY OF (B)

<table>
<thead>
<tr>
<th>Barangay</th>
<th>Name of Beneficiaries</th>
<th>Amount Paid</th>
<th>Remarks (for deceased beneficiaries)</th>
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</table>

Sub-total

Prepared by:  

(Signature over Printed Name)

Recommending Approval:  

SERVICE PROVIDER’S ACCOUNTANT  
(Signature over Printed Name)

Approved by:  

AREA MANAGER  
(Signature over Printed Name)
CERTIFICATION

This is to certify that the amount of ___________ (amount in words and figures) ___________ was paid by (Name of Service Provider) (Cluster) for the period of ___________ ___________ representing the stipend of beneficiaries of Social Pension for Indigent Senior Citizens for the province of ___________.

The liquidation report submitted by (Name of Service Provider) had been reviewed, verified and found correct and that the disbursements are proper and valid supported by the following:

1. Credit Advice
2. Deposit Slip
3. Acknowledgement Receipt
4. List of Paid Beneficiaries
5. List of Unpaid Beneficiaries supported by evidence of notification
6. Death certificate / barangay certificate in case of death of beneficiaries
7. Photocopy of OSCA ID of the deceased beneficiaries
8. Photocopy of the nearest kin’s ID of the deceased beneficiaries

Issued this ______ day of __________, 20___. Address

Certified by: ___________________________ Recommending Approval: ___________________________

SERVICE PROVIDER’S ACCOUNTANT AREA MANAGER
(Signature over Printed Name) (Signature over Printed Name)

FOR DSWD FIELD OFFICE USE ONLY:

Reviewed by: ___________________________ Recommending Approval ___________________________

FINANCE OFFICER REGIONAL ACCOUNTANT
(Signature over Printed Name) (Signature over Printed Name)

Approved by: ___________________________

REGIONAL DIRECTOR
(Signature over Printed Name)
LIST OF UNPAID BENEFICIARIES FOR SOCIAL PENSION FOR INDIGENT SENIOR CITIZENS

Name of Service Provider and Branch: ____________________________
No. of Beneficiaries Unpaid: ________________
Province Covered: ____________________________
Total Unpaid Amount: ________________
Total Amount of Refund: ________________
Period of stipend covered: ________________

DETAILS OF UNPAID BENEFICIARIES WITH 14 DAYS HOLDING PERIOD:

MUNICIPALITY OF (A)

<table>
<thead>
<tr>
<th>Barangay</th>
<th>Name of Beneficiaries</th>
<th>Unpaid Amount</th>
<th>Status</th>
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</table>

Sub-total

DETAILS OF UNPAID BENEFICIARIES DUE TO DEATH:

MUNICIPALITY OF (A)

<table>
<thead>
<tr>
<th>Barangay</th>
<th>Name of Beneficiaries</th>
<th>Unpaid Amount</th>
<th>Remarks</th>
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<tr>
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Sub-total

Prepared by: ____________________________
Recommending Approval: ____________________________

_________________________________________
(Signature over Printed Name)

SERVICE PROVIDER’S ACCOUNTANT

_________________________________________
(Signature over Printed Name)

Approved by: ____________________________

_________________________________________
(Signature over Printed Name)

AREA MANAGER

Note: 1. Initial Liquidation – total refund shall be equal to the amount of unpaid beneficiaries due to death
2. Liquidation after lapse of 14 days holding period – total amount of refund shall be equal to the total amount of unpaid beneficiaries