

(G) Understanding the Claims Process

Member & Employer submissions

Documents required
(before claim can be processed and the 3-month processing period starts)

- 1. Orion Claim Form**
(Stamped & signed by both Member & Employer)
- 2. Clear Copy Of Id Or Valid Passport**
- 3. If Retiring/Withdrawal:**
Confirmation Of Bank Account Details (Must Be Member Account)
AND/OR
- 3. If transferring (Full/Part):**
Copy Of Transfer Application Form
- 4. Tax Registration Certificate**

Orion Claim Form
(must be signed, stamped & duly completed with the following information)

- 1. Member Personal Details**
- 2. Tax Number And Tax Office**
- 3. Date Of Exit And Date Of Last Contribution**
- 4. Type Of Exit**
- 5. Clear Payment Instruction**

NB - Member Must Ensure:

1. All tax returns are submitted & assessed on ITAS
 2. Bank Account is Open and Active.
- TO AVOID DELAYS!!-

Claim Payment Process

1. Claim Received

Queued for validation.

2. Validation of Claim

- Claim form & supporting documents (see above) reviewed.
- Month of exit contributions must have been received and updated.

3. Tax Directive Request from NamRA

If transferring, a Recognition of Transfer form must be completed prior to submission of tax directive request.

4. Verification of member bank account

- Account verification sent to member's Bank.
- Bank to verify & confirm if account is open and active.

5. Claim Processed

- Claim processed for payment on Admin System.
- Claim is then submitted for authorisation.

6. Claim Authorisation & Payment

- Claim payment is reviewed and authorised.
- Claim is submitted to Accounts for payment.

7. Claim Paid

- Funds should reflect in member's bank account in 3 working days.

Important Timelines

3 month

- It takes 3 months to complete steps 2 to 7 in the Claim Payment Process.
- NB - Complete Forms, Supporting Documents & Last Pension Contributions - required to avoid delays.

5 - 10 Days

- It takes 5 to 10 working days at step 5 of the Claim Payment Process for delayed claims.

FIFO

- Claims are received on the First-in, First-Out basis.
- NB - Claims with outstanding documents and/or contributions (i.e. delayed claims) are moved to the back of the queue.

10 - 15 Days

- It takes 5 to 10 working days at step 6 of the Claim Payment Process for delayed claims.