

NHS Pensions - Completion of retirement claim forms (AW8/AW8P/AW8PC)

The purpose of this factsheet is to clarify which pension application form should be completed when a member claims their NHS Pension Scheme benefits: retirement benefits claim form (AW8), deferred benefits claim form (AW8P) or application form for Pension Credit members (AW8PC).

Completion of retirement benefits claim form (AW8)

The employer should send retirement benefits claim form (AW8) to the employee ideally six months prior to their intended retirement date. Once the retirement benefits claim form (AW8) has been completed by both parties, it should be submitted approximately three months before the member's intended retirement date. A retirement benefits claim form (AW8) should be completed in the following circumstances:

- For all members who are in NHS pensionable employment at their date of retirement.
- Where a member is still in active employment and claiming both their 1995 Section and 2008 Section benefits it is only necessary to complete one retirement benefits claim form (AW8).
- Where a member is claiming only their 2008 Section benefits.
- Where ill health retirement has been agreed and the member is still in pensionable employment. For example, the member may be off sick, but still regarded as an employee.
- For members who have opted out of the Scheme but remain in NHS employment until their pension benefits become payable.
- Where a member has ceased contributing because they have achieved maximum service or pensionable age. In these cases the retirement benefits claim form (AW8) should be completed and clearly marked as such by the employer.
- For all Redundancy, Interest of the Efficiency of the service (IoE) and Actuarially Reduced Early Retirement (ARER) cases.

Completion of deferred benefits claim form (AW8P)

A member can obtain the deferred benefits claim form (AW8P) either by downloading the form from the NHS Pensions website or by contacting the NHS Pensions helpline. A deferred benefits claim form (AW8P) should be completed in the following circumstances:

- Where the member has left NHS pensionable employment.
- Where a member claims payment of their pension under Early Payment of Preserved Benefits (EPPB) and has left pensionable employment for more than 12 months.
- Where ill health retirement has been accepted and the member has deferred benefits.

Completion of application form for Pension Credit members (AW8PC)

A member with a Pension Credit will need to claim their Pension Credit separately using the application form for Pension Credit members (AW8PC).