

NHS Pensions - How to claim retirement benefits (Active members) video transcript

How you claim your benefits will depend on what type of member you are.

If you are currently in NHS employment you will follow our active member, Sophia.

If you left NHS employment, you are classed as a deferred member and will follow Joe. Please watch our other video 'How to claim your retirement benefits if you are a deferred member'.

If you are an active member like Sophia, you should tell your employer that you intend to retire. We recommend you do this about four months before your retirement date.

Your employer will provide you with a Retirement benefits claim form (AW8).

You should read the Retirement Guide which is available on our website before completing your form.

The instructions on the front of the form tell you which sections you need to complete. Make sure you provide all the information requested.

Missing information may lead to a delay in processing your application.

There are some useful guidance notes at the back to help you complete the form.

If you have any queries while completing your application, please speak to your employer.

Make sure you sign the declaration and ask a witness to sign the form before giving it back to your employer. They may need to see original or certified copies of any birth, marriage or death certificates.

Your employer will complete their sections before submitting it to NHS Pensions. This should be done three months before your intended retirement date.

At times, we may need to contact your employer, a previous employer or yourself for further information. If you receive a request for information, please respond as soon as possible to prevent any unnecessary delays.

Once your application has been processed, we will send you a letter confirming your pension benefits.

We aim to pay your pension and lump sum within 30 days of your retirement date, as long as we have all the information needed to process your application.

If you have any questions about your application, please speak to your employer who should be able to help you.

Further information about NHS Pension Scheme benefits is available on our website at www.nhsbsa.nhs.uk/nhs-pensions

Our online knowledge base 'Ask Us' can answer your questions 24 hours a day, 7 days a week.

Alternatively, you can contact our member helpline on 0300 330 1346.

The information in this video is correct at the time of publication (November 2016).