

When should an AW8/AW8P Retirement application form be completed?

This table has been created to assist employers when deciding which retirement application form AW8/AW8P needs to be completed on a members retirement.

Circumstances	AW8	AW8P
<p>Members in NHS employment at the date of retirement. Examples of this might be:</p> <ul style="list-style-type: none"> • Members who have opted out of the Scheme but remained in NHS employment and benefits become payable (have reached their normal pension age). • Members who have opted out of the Scheme but remained in NHS employment and are under normal retirement age. • Members in NHS employment and their payable date is the day after their last day of employment. • Members accepted for ill health retirement and are still in pensionable employment (may be off sick) but still regarded as an employee. • Members retiring on Redundancy, Interests of efficiency, Actuarially reduced Early Retirement. • Members retiring on Early Payment of preserved benefits (EPPB) who are still in NHS employment (note: if the payable date is not the day after the last day of service a supplementary form is also required). • Members in NHS employment claiming from more than one section or scheme (benefits are not deferred). 	<p>Yes</p>	

<p>Members claiming benefits who are no longer in NHS employment Examples of this might be:</p> <ul style="list-style-type: none"> • Members who are no longer in NHS employment. • Members no longer in NHS employment and membership is deferred. • Members who are special class and have chosen to defer their pre 17 May 1990, but are now wishing to claim this element. • Members who have been accepted for ill health retirement and their pension benefits are deferred. • Members in more than one section or scheme claiming benefits from an earlier deferred period and are no longer in NHS employment.. 		Yes
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AW8 retirement application form

It is the responsibility of the employer to issue the retirement application form AW8 to the member. The retirement application form AW8 is partly completed by the member and partly completed by the employer.

AW8P retirement application form

It is the members responsibility to download the retirement application form AW8P from our website.

Note:

Employers should always refer to the Pensions Online (POL) Guide when submitting the retirement application form AW8. **A paper form submission may be required in some circumstances.** Further information can be found on our website in the the AW8 – Retirement benefit claim form POL Guide at www.nhsbsa.nhs.uk

Supplementary forms and additional information

Employers should send supplementary forms or any additional information relating to a members retirement application form AW8 via email to the nhsbsa.polia3@nhs.net