

APPROVED

**

International Process Guidelines

Pensions

P\_BUC\_03

Invalidity Pension Claim

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Common Data Model version 4.1.0

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**Document history:**

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| --- | --- | --- | --- |
| **Revision** | **Date** | **Created by** | **Short Description of Changes** |
| v0.1 | 08/08/2017 | Secretariat | First draft of the document submitted for review to the Pension Ad Hoc group |
| v0.2 | 06/11/2017 | Secretariat | Comments received from the AHG integrated. |
| v0.99 | 04/12/2017 | Secretariat | Implemented changes and updates following the AC review. Version submitted for AC approval |
| v1.0 | 19/12/2017 | Secretariat | **AC approved version.** |
| v4.1.0 | 02/10/2018 | Secretariat | **Performed patch changes to reference the new CDM version 4.1.0** |

# **P\_BUC\_03 – Invalidity Pension Claim**

**Description:** This case deals with situations where the citizen (an insured person who wants to claim for Invalidity pension and had worked/lived in more than one EU/EFTA Member State) is or becomes incapacitated for work leading to invalidity they will claim an Invalidity Pension (the citizen becomes a claimant). Where the claimant has been subject to the legislation of two or more Member States of which at least one is a Type B scheme and the Member State to which the claimant applied assumes responsibility for coordinating the Invalidity Pension claim under all the legislations of the Member States to which the claimant has been subject (Exceptions apply as per EU Regulation (EC) No 883/2004). This institution assumes the role of the Contact Institution and is responsible for starting and coordinating a process which assures that the Claimant receives the Invalidity Pension they are entitled to and are not disadvantaged by their decision to exercise their right to free movement and work or live in more than one EU/EFTA Member State (a fundamental pillar of the EU).

**Legal base:** The legal basis of the P\_BUC\_03 lies in Regulation (EC) No 883/2004 and in the Implementing Regulation (EC) No 987/2009. The following table specifies SEDs used in this BUC and documents the articles that provide the legal basis for each SED:

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| **SED** | **Basic Regulation (883/2004)** | | | | | | | | **Implementing Regulation (987/2009)** | | | | | | | | | | | | | |
| **1** | **6** | **45** | **49** | **51** | **52** | **57** | **60** | **12(1)** | **45(4)** | **46(1)** | **46(3)** | **47(1)** | **47(4)** | **47(5)** | **47(6)** | **48** | **48(1)** | **48(2)** | **50(1)** | **51(2)** | **52(1)b** |
| P2200 |  |  |  |  |  |  |  |  |  | **✓** | **✓** |  |  | **✓** | **✓** |  |  |  |  |  |  |  |
| P3000 | **✓** |  |  |  |  |  |  |  |  | **✓** | **✓** |  |  | **✓** | **✓** |  |  |  |  |  |  |  |
| P4000 |  |  |  |  |  |  |  |  | **✓** |  | **✓** |  |  | **✓** |  |  |  |  |  |  |  |  |
| P5000 | **✓** | **✓** | **✓** | **✓** | **✓** | **✓** | **✓** | **✓** | **✓** |  |  |  |  | **✓** | **✓** |  |  |  |  |  |  | **✓** |
| P6000 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | **✓** |  | **✓** |  |  | **✓** |  |
| P7000 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | **✓** |  |  |  |  |  |
| P8000 |  |  |  |  |  |  |  |  |  |  |  |  | **✓** | **✓** |  |  |  |  |  |  |  |  |
| P9000 |  |  |  |  |  |  |  |  |  |  |  |  | **✓** | **✓** |  |  |  |  |  |  |  |  |
| P10000 |  |  |  |  |  |  |  |  |  |  |  | **✓** | **✓** | **✓** |  |  |  |  | **✓** |  |  |  |

**Request-reply SEDs:**

| REQUEST SED | REPLY SED(s) |
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| P8000 Request for additional information | P9000Reply to request for additional information |

**Glossary of relevant terms used in P\_BUC\_03:**

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| **Term used** | **Description** |
| ***Case Owner*** | In this BUC the Case Owner is the Competent Institution who performed the role of the Contact Institution as described by the Regulations. |
| ***Counterparty*** | In this BUC the Counterparty(ies) are Competent Institutions who perform the role of Institutions Concerned as described by the Regulations. |
| ***Claimant*** | In this BUC the Claimant is the Insured Person who wishes to claim the Invalidity Pension (i.e. they are a Pensioner). |

## How to start this BUC?

In order to help you understand the P\_BUC\_03 we have created a set of questions that will guide you through the main scenario of the process as well as possible sub-scenarios or options available at each step along the way. Ask yourself each question and click on one of the hyperlinks that will guide you to the answer. You will notice that in some of the steps where it is allowed to use the additional horizontal and administrative sub-processes they will be listed under the step description.

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| What is my role in the social security exchange of information I have to complete? |
| If you are the Institution in the Member State who performs the role of the ‘Contact Institution’ as described by the Regulations your role will be defined as the **Case Owner**. This is typically when the claimant is residing in your Member State, however, if he/she has not been insured in the Member State of Residence you could be the Member State where he/she was most recently insured.  [I am the Case Owner](#_CO.1_Who_do)  (step CO.1) |
| If you are the Institution in the Member State who performs the role of ‘Institutions Concerned’ as described by the Regulations your role will be defined as the **Counterparty**. You will receive a claim for Invalidity Pension and need to take a decision.  [I am the Counterparty](#first_step_CP) (step CP.1) |

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| CO.1 **Who do I need to exchange information with?** |
| As the Case Owner, your first step will be to identify one or more responsible Member State(s) that you wish to submit the claim to. Then you must identify the relevant Institution in each of those Member States that are responsible for handling the Invalidity Pension Claim. The institution can be chosen only among the institutions responsible for the Pensions sector. This activity will define the Counterparties you will be working with in the exchange of information.  [I need to identify the Counterparty](#identify_institution) (step CO.2)  [I have identified the Counterparty I need to contact](#CO3)  (step CO.3) |

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| CO.2 How do I identify the correct institution to exchange information with? |
| In order to determine the relevant Competent Institution from another Member State you will need to consult the Institution Repository (IR). The IR provides an electronic record of all current and previous Institutions by their roles including Liaison Bodies that have been responsible for the cross border coordination of social security information for each of the relevant Member States for P\_BUC\_03.  Please note that the Liaison Body (if attributed to this BUC) should be chosen only if it is impossible to identify the correct Competent Institution in the respective Member State or if the case is handled by the Liaison Body.  To access the IR please use the following link.  [I have now identified the Competent Institutions from the Member State(s) I need to contact](#CO3)  (step CO.3) |

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| CO.3 How do I send ‘Invalidity Pension Claim’ - SED P2200? |
| Fill out the ‘Invalidity Pension Claim’ [SED P2200](../../../SEDs/P2200.docx) by entering all the required information. Afterwards, you send the [SED P2200](../../../SEDs/P2200.docx) to the Counterparty(ies).  [There are multiple possible next steps in this process, click here to see all the options.](#_CO.5_What_are) (step CO.4) |
| Sub-process steps available to the Case Owner at this stage:  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CO.4 What are my next steps in this process? |
| When you submitted the ‘Invalidity Pension Claim’ - [SED P2200](../../../SEDs/P2200.docx) you submitted a formal claim to those Member States for a Pension on behalf of the claimant.  Next you should complement the claim with as much supplementary information as possible to allow the counterparties to take their decision for Pension; alternatively you may also receive SED from the Counterparties:  [Send Country specific information SED P3000](#_CO.5_How_do) (step CO.5)  [Send Report on insurance history SED P4000](#_CO.8_How_do)  (step CO.6)  [Send Insurance/Residence Periods SED P5000](#_CO.7_How_do) to the counterparty(ies)(step CO.7)  [Send](#_CO.12_How_do) Pension decision SED P6000 (step CO.8)  [Request additional information from one or more of the counterparties](#_CO.14_How_do) SED P8000 (step CO.9)  [Send a transfer of Additional Information SED P10000](#_CO.16_How_do)  (step CO.10)  [I have received Insurance/Residence Periods SED P5000 from a counterparty](#_CO.18_What_should) (step CO.11)  [I have received Pension Decision SED P6000 from a counterparty](#_CO.19_What_should) (step CO.12)  [I have received Request for Additional Information SED P8000 from a counterparty](#_CO.20_What_should) (step CO.13)  [I have received Reply to Request for Additional Information SED P9000 from a counterparty](#_CO.21_What_should) (step CO.14)  [I have received Transfer of Additional Information SED P10000](#_CO.22_What_should) from a counterparty (step CO.15) |
| Sub-process steps available to the Case Owner at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to provide Notification of Medical Information (H\_BUC\_09)](../../../../Horizontal_Sub-Processes/H_BUC_09_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Remove Participant from a multilateral case (AD\_BUC\_04)](../../../../Administrative_Sub-Processes/AD_BUC_04_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to invalidate a sent SED (AD\_BUC\_06)](../../../../Administrative_Sub-Processes/AD_BUC_06_Subprocess.docx)  [I want to send Reminder (AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CO.5 How do I send ‘Country Specific Information’ - SED P3000? |
| There are 32 versions of the SED P3000 – one for each Member State, EEA country and Switzerland. The last two letters determine the country for which the P3000 is designed (for example P3000\_IT is specifically designed for Italy, while SED P3000\_DE is designed for Germany.  Fill out the ‘Country Specific Information’ - [SED P3000](../../../SEDs/P3000.docx) by entering all the required information in the section regarding Invalidity Pension (You should not fill the others). Afterwards, you send the [SED P3000](../../../SEDs/P3000.docx) to the Counterparty(ies). You must only send the relevant SED P3000 to each Member State, however if there are two Counterparties from one Member State the SED P3000 must be sent to both.  The 'Country Specific Information' - [SED P3000](../../../SEDs/P3000.docx) supplements the previously issued Invalidity Pension Claim with specific detailed information needed by a Member State to support the Invalidity Pension Claim.  As a general rule SED P3000 should always be sent immediately after SED P2200 to accelerate the procedure in the Member States involved, however, it is also possible to send SED P3000 later on, if the country specific information has to be clarified first.  Some of the country specific information can be gained from the records of the contact institution and some of the national pension claim of the contact institution. But there might be cases, where not all of the needed country specific information is known in the contact institution. That should not hinder to initiate the pension claim procedure also in the Member States involved. The country specific information is not mandatory and it can be determined by the competent institution itself, if it is relevant.  There are multiple possible next steps in this process, [click here to see all the options](#_CO.5_What_are) (step CO.4) |
| Sub-process steps available to the Case Owner at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to provide Notification of Medical Information (H\_BUC\_09)](../../../../Horizontal_Sub-Processes/H_BUC_09_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Remove Participant from a multilateral case (AD\_BUC\_04)](../../../../Administrative_Sub-Processes/AD_BUC_04_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to invalidate a sent SED (AD\_BUC\_06)](../../../../Administrative_Sub-Processes/AD_BUC_06_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CO.6 How do I send ‘Report on Insurance History’ - SED P4000? |
| Fill out the ‘Report on Insurance History’ - [SED P4000](../../../SEDs/P4000.docx) by entering all the required information. Afterwards, you send the [SED P4000](../../../SEDs/P4000.docx) to all the Counterparties  The [SED P4000](../../../SEDs/P4000.docx) is a notification of the insured person’s insurance history in in EU/EFTA Member State(s).  It is filled in on the basis of the insured person’s own statement about their insurance history abroad. With this information the Counterparties shall be enabled to clarify the insurance/residence periods according to their legislation.  In other words: SED P4000 is intended to be the basis for the institutions to clarify the periods according to their national legislation and to certify them in the 'Insurance/Residence Periods' – SED P5000.  The 'Report on Insurance History' - SED P4000 should include the whole insurance history with the relevant periods of all EU/EFTA Member States where the insured person has been working/residing (except the sending Member State).  There are multiple possible next steps in this process, [click here to see all the options](#_CO.5_What_are) (step CO.4). |
| Sub-process steps available to the Case Owner at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to provide Notification of Medical Information (H\_BUC\_09)](../../../../Horizontal_Sub-Processes/H_BUC_09_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Remove Participant from a multilateral case (AD\_BUC\_04)](../../../../Administrative_Sub-Processes/AD_BUC_04_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to invalidate a sent SED (AD\_BUC\_06)](../../../../Administrative_Sub-Processes/AD_BUC_06_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CO.7 How do I send ‘Insurance/residence periods’ - SED P5000? |
| Fill out the ‘Insurance/residence periods’ - [SED P5000](../../../SEDs/P5000.docx) by entering all the required information. Afterwards, you send the [SED P5000](../../../SEDs/P5000.docx) to all the Counterparties. The SED P5000 always provides a detailed summary of insurance/residence periods for the insured person as they are recognised in the sending Member State.  If there are periods in several independent systems in one Member State, the institutions concerned can certify their periods in a separate SED P5000 for each system or in one SED P5000.  There are multiple possible next steps in this process, [click here to see all the options](#_CO.5_What_are) (step CO.4). |
| Sub-process steps available to the Case Owner at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to provide Notification of Medical Information (H\_BUC\_09)](../../../../Horizontal_Sub-Processes/H_BUC_09_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Remove Participant from a multilateral case (AD\_BUC\_04)](../../../../Administrative_Sub-Processes/AD_BUC_04_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to invalidate a sent SED (AD\_BUC\_06)](../../../../Administrative_Sub-Processes/AD_BUC_06_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CO.8 How do I send ‘Pension Decision’ - SED P6000? |
| Fill out the ‘Pension Decision’ - [SED P6000](../../../SEDs/P6000.docx) by entering all the required information. Afterwards, you send the [SED P6000](../../../SEDs/P6000.docx) to all the Counterparties. The 'Pension Decision' - [SED P6000](../../../SEDs/P6000.docx) is a notification of the final or provisional decision your institution has taken with regards to the claimants claim for Invalidity Pension.  The SED P6000 includes either a positive decision indicating the amount and frequency of payment of the Invalidity Pension that was awarded, or a negative decision indicating the reason for it.  There are multiple possible next steps in this process, [click here to see all the options](#_CO.5_What_are) (step CO.4) |
| Sub-process steps available to the Case Owner at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to provide Notification of Medical Information (H\_BUC\_09)](../../../../Horizontal_Sub-Processes/H_BUC_09_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Remove Participant from a multilateral case (AD\_BUC\_04)](../../../../Administrative_Sub-Processes/AD_BUC_04_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to invalidate a sent SED (AD\_BUC\_06)](../../../../Administrative_Sub-Processes/AD_BUC_06_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CO.9 How do I send ‘Request for Additional Information’ - SED P8000? |
| Fill out the ‘Request for Additional Information’ - [SED P8000](../../../SEDs/P8000.docx) by entering all the required information. Afterwards, you send the 'Request for Additional Information' - [SED P8000](../../../SEDs/P8000.docx) to one or more of the Counterparties. The [SED P8000](../../../SEDs/P8000.docx) is a request for specific additional information you need to allow you to progress with the claim for Invalidity Pension you have received.  You can send one or more SED P8000 to the counterparties if you have different questions during the case-handling.  There are multiple possible next steps in this process, [click here to see all the options](#_CO.5_What_are) (step CO.4) |
| Sub-process steps available to the Case Owner at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to provide Notification of Medical Information (H\_BUC\_09)](../../../../Horizontal_Sub-Processes/H_BUC_09_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Remove Participant from a multilateral case (AD\_BUC\_04)](../../../../Administrative_Sub-Processes/AD_BUC_04_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to invalidate a sent SED (AD\_BUC\_06)](../../../../Administrative_Sub-Processes/AD_BUC_06_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CO.10 How do I send ‘Transfer of Additional Information’ – SED P10000? |
| Fill out the ‘Transfer of Additional Information’ - [SED P10000](../../../SEDs/P10000.docx) by entering all the required information. Afterwards, you send the [SED P10000](../../../SEDs/P10000.docx) to one or more of the Counterparties. The 'Transfer of Additional Information' - [SED P10000](../../../SEDs/P10000.docx) is a notification/transfer of relevant information to assist with the claim handling procedure without a previous request. (If there was a previous request on SED P8000 for additional information, the reply should always be made on [‘Reply to Request for Additional Information’ – SED P9000](../../../SEDs/P9000.docx).)  There are multiple possible next steps in this process, [click here to see all the options](#_CO.5_What_are) (step CO.4). |
| Sub-process steps available to the Case Owner at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to provide Notification of Medical Information (H\_BUC\_09)](../../../../Horizontal_Sub-Processes/H_BUC_09_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Remove Participant from a multilateral case (AD\_BUC\_04)](../../../../Administrative_Sub-Processes/AD_BUC_04_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to invalidate a sent SED (AD\_BUC\_06)](../../../../Administrative_Sub-Processes/AD_BUC_06_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CO.11 What should I do if I have received ‘Insurance/Residence Periods’ - SED P5000? |
| You have received the ‘Insurance/Residence Periods’ - [SED P5000](../../../SEDs/P5000.docx), this SED will provide you with the insurance/residence periods of the Counterparty that sent you the SED P5000.  If you know your own Insurance/Residence Periods (i.e. typically you have already issued SED P5000) and you have received SEDs P5000 from all other Counterparties in this case, you should have all the required information you need to calculate the pro-rata Invalidity Pension and award the Invalidity Pension under EC law. If you have done this then typically your next step is to [issue a 'Pension Decision' – SED P6000](#_CO.12_How_do). (step CO.8)  If this is not the case then there are multiple possible next steps in this process, [click here to see all the options](#_CO.5_What_are) (step CO.4) |
| Sub-process steps available to the Case Owner at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to provide Notification of Medical Information (H\_BUC\_09)](../../../../Horizontal_Sub-Processes/H_BUC_09_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Remove Participant from a multilateral case (AD\_BUC\_04)](../../../../Administrative_Sub-Processes/AD_BUC_04_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CO.12 What should I do if I have received ‘Pension Decision’ - SED P6000? |
| You have received the [‘Pension Decision’ - SED P6000](../../../SEDs/P6000.docx), this SED will provide you with the Pension Decision of the Counterparty that sent you the SED P6000.  If you have taken your own decision (i.e. typically you have already issued SED P6000) and you have received final SEDs P6000 Pension Decisions from all other Counterparties in this case, you should have all the required information to make the ['Notification of Summary Note' - P7000](../../../SEDs/P7000.docx) and [issue a Portable Document P1](#_CO.25_How_do) (step CO.17).  If this is not the case then there are multiple possible next steps in this process, [click here to see all the options](#_CO.5_What_are) (step CO.4) |
| Sub-process steps available to the Case Owner at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to provide Notification of Medical Information (H\_BUC\_09)](../../../../Horizontal_Sub-Processes/H_BUC_09_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Remove Participant from a multilateral case (AD\_BUC\_04)](../../../../Administrative_Sub-Processes/AD_BUC_04_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CO.13 What should I do if I have received ‘Request for Additional Information’ - SED P8000? |
| You have received the ‘Request for Additional Information’ - [SED P8000](../../../SEDs/P8000.docx), this SED is a request for you to provide specific additional information that is needed by the Counterparty.  Typically you must [reply to the request with a 'Reply to Request for Additional Information' – SED P9000](#_CO.23_How_do) (step CO.16) – which provides the requested information, however in some situation the SED P8000 may request another SED as a reply, if this is the case then there are multiple possible next steps in this process, [click here to see all the options](#_CO.5_What_are) (step CO.4) |
| Sub-process steps available to the Case Owner at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to provide Notification of Medical Information (H\_BUC\_09)](../../../../Horizontal_Sub-Processes/H_BUC_09_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Remove Participant from a multilateral case (AD\_BUC\_04)](../../../../Administrative_Sub-Processes/AD_BUC_04_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CO.14 What should I do if I have received ‘Reply to Request for Additional Information’ - SED P9000? |
| You have received the ‘Reply to Request for Additional Information’ - [SED P9000](../../../SEDs/P9000.docx), this SED is a notification of requested information that was requested by you or another Counterparty. This information should support you in your decision making for the Invalidity Pension Claim.  There is no reply to the SED [P9000](../../../SEDs/P9000.docx) and there are multiple possible next steps in this process, [click here to see all the options](#_CO.5_What_are) (step CO.4) |
| Sub-process steps available to the Case Owner at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to provide Notification of Medical Information (H\_BUC\_09)](../../../../Horizontal_Sub-Processes/H_BUC_09_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Remove Participant from a multilateral case (AD\_BUC\_04)](../../../../Administrative_Sub-Processes/AD_BUC_04_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to invalidate a sent SED (AD\_BUC\_06)](../../../../Administrative_Sub-Processes/AD_BUC_06_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CO.15 What should I do if I have received ‘Transfer of Additional Information’ - SED P10000? |
| You have received the ‘Transfer of Additional Information’ - [SED P10000](../../../SEDs/P10000.docx), this SED is a notification/transfer of additional information from a Counterparty. This information should support you in your decision making for the Invalidity Pension Claim.  There is no reply to the SED [P10000](../../../SEDs/P10000.docx) and there are multiple possible next steps in this process, [click here to see all the options](#_CO.5_What_are) (step CO.4). |
| Sub-process steps available to the Case Owner at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to provide Notification of Medical Information (H\_BUC\_09)](../../../../Horizontal_Sub-Processes/H_BUC_09_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Remove Participant from a multilateral case (AD\_BUC\_04)](../../../../Administrative_Sub-Processes/AD_BUC_04_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CO.16 How do I send ‘Reply to Request for Additional Information’ – SED P9000? |
| Fill out the ‘Reply to Request for Additional Information’ - [SED P9000](../../../SEDs/P9000.docx) by entering all the required information. Afterwards, you must send the [SED P9000](../../../SEDs/P9000.docx) to the Counterparties that sent you the P8000. In addition you must send your P9000 to any other counterparties that received the ['Request for Additional Information' – SED P8000](../../../SEDs/P8000.docx) Request SED.  The [SED P9000](../../../SEDs/P9000.docx) is a reply to a request for specific additional information you have received and you must strive to provide the requested information as quickly as possible.  SED P9000 is a reply to a request for additional information made by using SED P8000. Hence SED [P9000](../../../SEDs/P9000.docx) is a reply to SED P8000. The information which is requested is stated on the SED P8000 and the answer is given on SED [P9000](../../../SEDs/P9000.docx) and/or the requested SED. (Information which is communicated to other institutions without prior request has to be done with ['Transfer of Additional Information' – SED P10000](../../../SEDs/P10000.docx).)  There are multiple possible next steps in this process, [click here to see all the options](#_CO.5_What_are) (step CO.4) |
| Sub-process steps available to the Case Owner at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to provide Notification of Medical Information (H\_BUC\_09)](../../../../Horizontal_Sub-Processes/H_BUC_09_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Remove Participant from a multilateral case (AD\_BUC\_04)](../../../../Administrative_Sub-Processes/AD_BUC_04_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CO.17 How do I send the Portable Document P1? |
| Fill out the [Portable Document P1](../../../PDs/PD_P1.docx) by entering all the required information. Afterwards, you must send the [PD P1](../../../PDs/PD_P1.docx) to the claimant. You must do this following the way you have agreed to do this nationally but usually it is sent by post as a printed document.  Portable document [P1](../../../PDs/P1.docx) is filled in based on the information on the final ['Pension Decisions' – SED P6000](../../../SEDs/P6000.docx) you have issued and received from all Counterparties. When PD P1 has been issued, the claimant will get the right for review (see points 3.7 and 4.4 on the PD P1).  [Next you must send SED P7000](#_CO.26_How_do) (step CO.18) |

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| CO.18 How do I send ‘Notification of Summary note’ - SED P7000? |
| Fill out the ‘Notification of Summary note’ - [SED P7000](../../../SEDs/P7000.docx) by entering all the required information. Afterwards, you must send the [SED P7000](../../../SEDs/P7000.docx) to all the Counterparties.  The SED P7000 is a summary note of all final Invalidity pension decisions (positive or negative) issued by the Case Owner and sent to all Counterparties. It corresponds with the Portable Document P1 (Summary of pension decisions) sent to the claimant. All final pension decisions (SED P6000) must be received before the ['Notification of Summary note' - SED P7000](../../../SEDs/P7000.docx) may be issued.  This Business Use Case usually ends here. |
| Sub-process steps available to the Case Owner at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to provide Notification of Medical Information (H\_BUC\_09)](../../../../Horizontal_Sub-Processes/H_BUC_09_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Remove Participant from a multilateral case (AD\_BUC\_04)](../../../../Administrative_Sub-Processes/AD_BUC_04_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CP.1 What should I do if I received ‘Invalidity Pension Claim’ - SED P2200? |
| The process is initiated by receiving the ‘Invalidity Pension Claim’ - [SED P2200](../../../SEDs/P2200.docx) from theCase Owner. The [SED P2200](../../../SEDs/P2200.docx) is a claim for Invalidity Pension submitted to you institution on behalf of a Claimant who resides in another Member State.  First, you check if you are responsible for the business process in accordance with your national procedures.  [I am responsible for the business process](#CP2) (step CP.2). |
| Sub-process steps available to the Counterparty at this stage:  [I want to Forward Case to another Competent Institution in my Member State (AD\_BUC\_05\_Sub).](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx) |

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| CP.2 What should I do if I am responsible for the business process? |
| I received the ‘Invalidity Pension Claim’ - [SED P2200](../../../SEDs/p2200.docx) from theCase Owner and I am responsible for the business process.  There are several steps you should take in this process and you should receive several SED from the Case Owner and any other Counterparties.  Your obligation as a Counterparty is to firstly send your Insurance/Residence periods (if any) to the Case Owner and other Counterparties.  [Send Insurance/Residence Periods SED P5000](#_CP.3_How_do) (step CP.3).  However there are many other options that may occur:  [Send Pension decision SED P6000](#_CP.5_How_do) (step CP.4).  [Send Request for Additional information SED P8000](#_CP.6_How_do) (step CP.5)  [Send Transfer of Additional information](#_CP.8_How_do) SED P10000(step CP.6).  [I have received Country Specific Information SED P3000](#_CP.10_What_should)  (step CP.7).  [I have received Report on Insurance history SED P4000 from the Case Owner](#_CP.11_What_should) (step CP.8).  [I have received Insurance/residence history SED P5000 from the Case Owner or a Counterparty](#_CP.12_What_should)  (step CP.9).  [I have received Pension Decision SED P6000 from the Case Owner or a Counterparty](#_CP.13_What_should) (step CP.10).  [I have received Request for Additional information SED P8000 from the Case Owner or a Counterparty](#_CP.14_What_should) (step CP.11).  [I have received a reply to my Request for Additional Information SED P9000 from the Case Owner or a Counterparty](#_CP.15_What_should) (step CP.12).  [I have received Transfer of Additional information SED P10000 by the Case Owner or a counterparty](#_CP.16_What_should) (step CP.13). |
| Sub-process steps available to the Counterparty at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [want to Forward Case to another Institution (AD\_BUC\_05)](../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CP.3 How do I send ‘Insurance/residence periods’ - SED P5000? |
| Fill out the ‘Insurance/residence periods’ - [SED P5000](../../../SEDs/P5000.docx) by entering all the required information. Afterwards, you send the [SED P5000](../../../SEDs/P5000.docx) to the Case Owner and all the Counterparties. The [SED P5000](../../../SEDs/P5000.docx) is a detailed summary of the Insurance (and possibly residence) periods the claimant has worked/lived in your Member State.  The SED P5000 always describes periods of insurance or residence as they are recognised in the sending Member State.  If there are periods in several independent systems in one Member State, the institutions concerned can certify their periods in a separate SED P5000 for each system or in one SED P5000.  There are multiple possible next steps in this process, [click here to see all the options](#_CP.2_What_should) (step CP.2). |
| Sub-process steps available to the Counterparty at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CP.4 How do I send ‘Pension Decision’ - SED P6000? |
| Fill out the ‘Pension Decision’ [SED P6000](../../../SEDs/P6000.docx) by entering all the required information. Afterwards, you send the [SED P6000](../../../SEDs/P6000.docx) to the Case Owner and all the Counterparties. The [SED P6000](../../../SEDs/P6000.docx) is a notification of the final or provisional decision your institution has taken with regards to the claimants claim for Pension.  The SED P6000 usually includes a positive decision indicating the amount and frequency of payment of the Invalidity Pension that was awarded, however should the decision be negative and no Pension awarded the SED P6000 will state this and include the reason for the negative decision.  There are multiple possible next steps in this process, [click here to see all the options](#_CP.2_What_should) (step CP.2). |
| Sub-process steps available to the Counterparty at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)[I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CP.5 How do I send ‘Request for Additional Information’ SED P8000? |
| Fill out the ‘Request for Additional Information’ - [SED P8000](../../../SEDs/P8000.docx) by entering all the required information. Afterwards, you send the [SED P8000](../../../SEDs/P8000.docx) to the Case Owner and/or one or more of the Counterparties. The [SED P8000](../../../SEDs/P8000.docx) is a request for specific additional information you need to allow you to progress with the claim for Invalidity Pension you have received.  You can send one or more 'Request for Additional Information' - SED P8000 to the Counterparties if you have different questions during the case handling.  There are multiple possible next steps in this process, [click here to see all the options](#_CP.2_What_should) (step CP.2). |
| Sub-process steps available to the Counterparty at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CP.6 How do I send ‘Transfer of Additional Information’ - SED P10000? |
| Fill out the ‘Transfer of Additional Information’ - [SED P10000](../../../SEDs/P10000.docx) by entering all the required information. Afterwards, you send the [SED P10000](../../../SEDs/P10000.docx) to the Case Owner and/or one or more of the Counterparties. The [SED P10000](../../../SEDs/P10000.docx) is a notification/transfer of relevant information to assist with the Invalidity claim handling procedure without a previous request. (If there was a previous request on SED P8000 for additional information, the reply should always be made on SED P9000.)  There are multiple possible next steps in this process, [click here to see all the options](#_CP.2_What_should) (step CP.2). |
| Sub-process steps available to the Counterparty at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CP.7 What should I do if I have received ‘Country Specific Information’ - SED P3000? |
| You have received the ‘Country Specific Information’ - [SED P3000](../../../SEDs/P3000.docx), this SED will provide you with the additional detailed information your Member States requires to help determine the pension right.  The SED P3000 is a notification of information, as such there is no reply necessary.  There are multiple possible next steps in this process, [click here to see all the options](#_CP.2_What_should) (step CP.2). |
| Sub-process steps available to the Counterparty at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CP.8 What should I do if I have received 'Report on Insurance History‘ - SED P4000? |
| You have received the 'Insured Person’s Report on Insurance History' - [SED P4000](../../../SEDs/P4000.docx), this SED will provide you with the information from the claimant concerning his/her insurance/residence history. This is provided to help to ensure all periods of insurance/residence are properly traced and included in the calculation of Invalidity Pension.  The ' Report on Insurance History' – SED P4000 is a notification of information, as such there is no reply necessary.  There are multiple possible next steps in this process, [click here to see all the options](#_CP.2_What_should) (step CP.2). |
| Sub-process steps available to the Counterparty at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CP.9 What should I do if I have received ‘Insurance/Residence Periods’ - SED P5000? |
| You have received the ‘Insurance/Residence Periods’ [SED P5000](../../../SEDs/P5000.docx), this SED will provide you with the insurance/residence periods of the institution that sent you the SED P5000.  If you know your own Insurance/Residence Periods (i.e. typically you have already issued SED P5000) and you have received SEDs P5000 from the Case Owner and any other Counterparties in this case, you should have all the required information to assist the invalidity pension processing. If you have done this then typically your next step is to [issue a Pension Decision P6000](#_CP.5_How_do) (step CP.5).  If this is not the case then there are multiple possible next steps in this process, [click here to see all the options](#_CP.2_What_should) (step CP.2). |
| Sub-process steps available to the Counterparty at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CP.10 What should I do if I have received ‘Pension Decision’ - SED P6000? |
| You have received a ‘Pension Decision’ - [SED P6000](../../../SEDs/P6000.docx), this SED will provide you with the Pension Decision of the institution that sent you the SED P6000.  If you have taken your own decision (i.e. typically you have already issued SED P6000) and you have received final SEDs P6000 Pension Decisions from the Case Owner and other Counterparties in this case then you should expect to [receive the SED P7000 from the Con](#_CP.19_What_should)tact Institution (step CP.20).  If it's not the case then there are multiple possible next steps in this process, [click here to see all the options](#_CP.2_What_should) (step CP.2). |
| Sub-process steps available to the Counterparty at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CP.11 What should I do if I have received ‘Request for Additional Information’ - SED P8000? |
| You have received the ‘Request for Additional Information’ - [SED P8000](../../../SEDs/P8000.docx), this SED is a request for you to provide specific additional information that is needed by the Institution issued the SED P8000.  Typically you must [reply to the request with a SED P9000](#_CP.17_How_do) (step CP.18) – which provides the requested information, however in some situation the SED P8000 may request another SED as a reply, if this is the case then there are multiple possible next steps in this process, [click here to see all the options](#_CP.2_What_should) (step CP.2). |
| Sub-process steps available to the Counterparty at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CP.12 What should I do if I have received ‘Reply to Request for Additional Information’ - SED P9000? |
| You have received the ‘Reply to Request for Additional Information’ - [SED P9000](../../../SEDs/P9000.docx), this SED is a notification of requested information that was requested by you or the Case Owner or another Counterparty. This information should support you in your decision making for the Invalidity Pension Claim.  There is no reply to the SED [P9000](../../../SEDs/P9000.docx) and there are multiple possible next steps in this process, [click here to see all the options](#_CP.2_What_should) (step CP.2). |
| Sub-process steps available to the Counterparty at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CP.13 What should I do if I have received ‘Transfer of Additional Information’ - SED P10000? |
| You have received the ‘Transfer of Additional Information’ - [SED P10000](../../../SEDs/P10000.docx), this SED is a notification/transfer of additional information from another institution. This information should support you in your decision making for the Invalidity Pension Claim.  There is no reply to the SED [P10000](../../../SEDs/P10000.docx) and there are multiple possible next steps in this process, [click here to see all the options](#_CP.2_What_should) (step CP.2). |
| Sub-process steps available to the Counterparty at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CP.14 How do I send ‘Reply to Request for Additional Information’ – SED P9000? |
| Fill out the ‘Reply to Request for Additional Information’ [SED P9000](../../../SEDs/P9000.docx) by entering all the required information. Afterwards, you must send the [SED P9000](../../../SEDs/P9000.docx) to the institution that sent you the P8000. In addition you must send your SED P9000 to any other institution that received the SED P8000 Request SED.  The [SED P9000](../../../SEDs/P9000.docx) is a reply to a request for specific additional information you have received and you must strive to provide the requested information as quickly as possible.  SED P9000 is a reply to a request for additional information made by using SED [P8000](../../../SEDs/P8000.docx). The information which is requested is stated on the SED P8000 and the answer is given on SED P9000. (Information which is communicated to other institutions without prior request has to be done with SED P10000.)  There are multiple possible next steps in this process, [click here to see all the options](#_CP.2_What_should) (step CP.2). |
| Sub-process steps available to the Counterparty at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

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| CP.15 What should I do if I have received ‘Notification of Summary note’ - SED P7000? |
| You have received the ‘Notification of Summary note’ - [SED P7000](../../../SEDs/P7000.docx), this SED is a summary of all final Pension decisions (positive or negative) that have been taken by the Case Owner and all Counterparties. The SED P7000 reflects the information that was included in the Portable Document P1 that was issued by the Case Owner to the Claimant.  This is the end of the Business Use Case. |
| Sub-process steps available to the Counterparty at this stage:  [I want to claim Reimbursement of Administrative check or Medical Information (H\_BUC\_04)](../../../../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)  [I want to Notify of Death of a person in an ongoing case (H\_BUC\_07)](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)  [I want to request a Medical Information (H\_BUC\_08)](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)  [I want to Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)  [I want to Forward Case to another Institution (AD\_BUC\_05)](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)  [I want to send Reminder(AD\_BUC\_07)](../../../../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)  [I want to Update information contained in a sent SED (AD\_BUC\_10)](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx) |

**BPMN diagram for P\_BUC\_03**

Click [here](../../../BPMN_Diagrams/P_BUC_03_Diagram.pdf) to open the BPMN diagram(s) for P\_BUC\_03.

# **Structured Electronic Documents (SEDs) used in the process**

The following SEDs are used in P\_BUC\_03:

* [SED P2200 - Invalidity Pension Claim](../../../SEDs/P2200.docx)
* [SED P3000 – Country Specific Information](../../../SEDs/P3000.docx)
* [SED P4000 – Report on Insurance History](../../../SEDs/P4000.docx)
* [SED P5000 – Insurance/Residence Periods](../../../SEDs/P5000.docx)
* [SED P6000 – Pension Decision](../../../SEDs/P6000.docx)
* [SED P7000 – Notification of Summary note](SEDs/P7000.docx)
* [SED P8000 – Request for Additional Information](../../../SEDs/P8000.docx)
* [SED P9000 – Reply to Request for Additional Information](../../../SEDs/P9000.docx)
* [SED P10000 – Transfer of Additional Information](../../../SEDs/P10000.docx)

# **Portable Documents**

The following Portable Document is used in P\_BUC\_03:

* [P1 –Summary of Pension Decisions]( PDs/PD_P1.docx)

# **Horizontal sub-processes**

The following horizontal sub-process is used in P\_BUC\_03:

* [H\_BUC\_04 - Reimbursement of Administrative check or Medical Information](../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx)
* [H\_BUC\_07 - Notification of Death](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)
* [H\_BUC\_08 – Medical Information](../../../../Horizontal_Sub-Processes/H_BUC_08_Subprocess.docx)
* [H\_BUC\_09\_Sub-process – Notification of Medical Information](../../../../Horizontal_Sub-Processes/H_BUC_09_Subprocess.docx)

# **Administrative sub-processes**

The following administrative sub-processes are used in P\_BUC\_03:

* [AD\_BUC\_03\_Sub-process - Add Participant](../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)
* [AD\_BUC\_04\_Sub-process - Remove Participant](../../../../Administrative_Sub-Processes/AD_BUC_04_Subprocess.docx)
* [AD\_BUC\_05\_Sub-process – Forward Case](../../../../Administrative_Sub-Processes/AD_BUC_05_Subprocess.docx)
* [AD\_BUC\_06\_Sub-process – Invalidate SED](../../../../Administrative_Sub-Processes/AD_BUC_06_Subprocess.docx)

* [AD\_BUC\_07\_Sub-process - Reminder](../Administrative_Sub-Processes/AD_BUC_07_Subprocess.docx)
* [AD\_BUC\_10\_Sub-process – Update SED](../../../../Administrative_Sub-Processes/AD_BUC_10_Subprocess.docx)

The following sub-processes are used for the handling of exceptional business scenarios that arise due to the exchange of social security information in an electronic environment and can be used at any point in the process:

* [AD\_BUC\_11\_Sub-process – Business Exception](../../../../Administrative_Sub-Processes/AD_BUC_11_Subprocess.docx)
* [AD\_BUC\_12\_Sub-process – Change of Participant](../../../../Administrative_Sub-Processes/AD_BUC_12_Subprocess.docx)