# SED P4000 - Report on insurance history (version 4 P-SEDs)

**1. Introductory remarks**

This SED has to be used in order to apply Art. 6 of Reg. 883/2004, Art.12 (1), 46(1) and 47(4) of Reg. 987/2009. SED P4000 includes information about the insured person’s insurance history. It is filled in on the basis of the person’s own statement about the insurance person’s insurance history abroad. With this information the institutions concerned shall be enabled to clarify the insurance 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 SED P5000.

Report on insurance history (SED P4000) should be provided as soon as possible so that the receiving institutions can start processing insurance periods. All institutions provide each other with insurance periods and pension decisions and other information needed. The purpose is to cover the majority of the communication that is needed related to the pension claim within the same case.

The SED should include the whole insurance history with the relevant periods of all countries where the insured person has been working/residing (except the sending Member State).

**2. Corresponding BUCs**

• P\_BUC 01 - Old age pension claim

• P\_BUC 02 – Survivors pension claim

• P\_BUC 03 – Invalidity pension claim

• P\_BUC 05 – Ad hoc Request for Pension Information

• P\_BUC 10 – Transitional Cases

**3. Content and handling**

SED P4000 comprises of the following sections:

• Local Case Number

• Insured person

• Claimant (survivor’s pension)

• Information on the insured person’s insurance history

Information in the section Claimant (survivor’s pension) is only to be given, if the claimant is different from the insured person. This is the fact in case of a survivor’s pension.

Information on the insured person’s insurance history should be given as detailed as possible to enable the other institutions concerned to clarify the insurance periods completed under their legislation and to speed up the pension claim procedure.

Any documents provided by the claimant should also be attached to the SED P4000. Some Member States require original documents. For those Member States the scans of original documents should have the confirmation that this is a scan of original document visible in the scan or this information should be provided as additional information. If an institution concerned needs some additional documents like work certificates, diplomas, certificates about military service or other documents, this has to be requested with SED P8000. The requested documents can be communicated as a file attachment to SED P9000.

The report on insurance history always refers to the insured person. For certain countries, there is a need to create an additional SED P4000 with information of insurance periods for the widow(er). When this is the case, the widow(er) is the insured person both in SED P4000 and in SED P5000.

SED P4000 can also be an answer to a request in P\_BUC\_05 and can be also used in P\_BUC\_10.

SED P4000 should include information about all types of periods which are relevant for pension purposes, particularly:

• Employment

• Self-employment

• Residence

• Child-raising

• Voluntary insurance

• Military service

• Maternity

• Training

• Unemployment benefits

• Sickness benefits

• Other type of insurance periods

Each period has to be stated in a separate subsection. The periods should be stated in a time based order. Each period includes information about fixed period or open period. Fixed period means that there is a start date and end date to fill in. Open period means that there is only start date possible to fill in.

If the insured person or claimant provides concrete dates for a period of employment / self- employment/residence e.g. worked in MS xx from 15/01/2001 until 29/01/2002 then data field "Fixed period" should be chosen, start date filled in with 15/01/2001, end date with 29/01/2002 and "Uncertain dates" with "No".

Work certificates etc. can be attached.

If the insured person or claimant (survivor's pensions) only can provide assumed or vague periods of employment/self-employment/residence without a concrete date e.g. worked in MS xx in 1975, then fill in the start date with fictitious date 01/01/1975, Type of Open Period with “End date of the period is unknown”, choose "Uncertain dates" with "Yes". Attach the document where the insured person or claimant has stated the alleged period of employment / self-employment.

Work certificates etc. can be attached.

The same procedure is valid for all other periods contained in SED P4000.

Each subsection contains the data field “Additional information concerning the period” to state detailed information about the period of time, if needed.

In order to see the content and explanatory notes of the SED P4000 please click [here]( Forms/P4000_en.htm).