



Information about the P1 form and its use

1. The P1 form

The P1 form provides an overview of the decisions taken in your case by the various institutions in the EU countries⁽¹⁾ from whom you have claimed an old age, survivors or invalidity pension. The information on the P1 is intended to enable you to examine whether any of your pensions have been adversely affected by the interaction of decisions taken by two or more institutions.

2. When will you receive a P1 form?

The P1 will be issued by the “contact institution” in your case after it has received details of the decisions made by the various institutions who have dealt with your claim. The “contact institution” is that institution to which you made your claim for pension. Usually this will be the institution in your country of residence, if you were insured there, or the institution in the country in which you were last insured. This institution is shown in Box 5 of the P1.

3. What to do when you receive your P1 form

Please read carefully the details provided in the ‘information for the holder’ and study in particular Boxes 3 and 4, including the reference to the national pension decision/possibility to contact the pension institution which issued the pension decision.

4. How these various awards may “interact” with each other

Although each decision in your case will have been made independently by each of the institutions involved, it may

be that the same factors have been taken into account by more than one institution. For example, you might have continued working and your earnings have been taken into account by more than one institution. This is permitted within prescribed limits, but you may feel this has operated unfairly in your case. Similarly, certain periods during which you were treated as though you were insured (so-called “equivalent periods”, such as time before leaving school or a period of sickness), may appear to have been omitted in one country because another country took them into account. Again this is permitted but only within prescribed rules.

The following example illustrates the process:

- On retiring from work in country A, an insured person claims her old age pension in country A, which is also her country of residence. When submitting her claim, on 1/4/2011, she advises that she has also worked in countries B and C.
- The institution in country A is the contact institution and it forwards details of the claim to institutions in B and C. A series of exchanges of insurance records and other details then follows.

Decisions are given in the case as follows:

- 1/6/2011 – The institution in country A makes an award and advises the pensioner of its decision (it also advises the other institutions involved).
- 1/8/2011 – The institution in country B makes an award and advises the pensioner of its decision (it also advises the other institutions involved).
- 1/10/2011 – The institution in country C makes an award and advises the pensioner of its decision (it also advises the other institutions involved).
- 5/10/2011 – The institution in country A issues a P1 form to the pensioner (and advises the institutions in B and C that it has done so).

⁽¹⁾ In the following text, the terms “EU Country” or “EU Member State” will also refer to Iceland, Liechtenstein, Norway and Switzerland as soon as Regulations 883/2004 and 987/2009 become applicable to them.



5. What happens if you think your award(s) of pension have been adversely affected by interaction?

Example:

- On receiving the P1 and examining the overview of your pension awards, you notice that your pension has been reduced in both countries A and B due to overlapping equivalent periods.
- You take the view that your rights have been adversely affected as effectively neither country has taken into account the equivalent period. You have the right to ask the institutions in those countries to review their awards. This request must be made within national time limits for review, but these only commence on the date you received the P1.

- On receipt of such a request, the institutions in countries A and B will review the decisions. In the event of a change by any institution the other institutions involved will need to be advised of the changed award and a new P1 issued by the contact institution.

6. Is the right to review the same as the right to appeal?

Please note that the right of review given by the EU Regulation does not need to be the same as your right of appeal under national law. A right of review may operate within different or no time limits or may follow different procedures. Depending on national legislation, you might have already been advised of your right of appeal separately for each individual pension award.