

approvedEVIEW

International Process Guidelines

Pensions

P\_BUC\_02

Survivors Pension Claim

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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 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\_02 – Survivors Pension Claim

**Description:** This case deals with situations where an insured person has died and one or more survivors (such as but not limited to spouse, registered partner, cohabiting partner, former spouse, own child , adopted child, foster child, step child, grandchild, sibling or other relative ) will claim a Survivors Pension (the person who is the survivor becomes a claimant). When the deceased person has lived or worked in more than one EU/EFTA Member State then a specific institution assumes responsibility for coordinating the survivors claim (this is usually the place where the claimant resides provided the deceased person had previously been insured there, if not other rules apply see Regulation (EC) 987/2009 Art. 47 (1)). This institution assumes the role of the Contact Institution (Case Owner) and is responsible for starting and coordinating a process which assures that the claimant receives the Survivors Pension they are entitled to and are not disadvantaged by the deceased person's decision to exercise their right to free movement and work or live in more than one EU/EFTA Member State.

There is a separate BUC and a separate SED P2100 for each claimant. Children reported on the widow(er)’s claim will not be recognized as claimants for an orphan’s pension. For an orphan’s pension a separate SED P2100 is needed with the child as a claimant. Nationally it is of course possible to have only one pension case for all the claimants and to have the same case number for all of them, but the claims, insurance/residence periods and decisions of different claimants all need to travel in separate BUCs. That is also why there is a data item at the end of the SED P2100 that asks for the number of claimants.

**Legal base:** The legal basis of the P\_BUC\_02 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:

|  |  |  |
| --- | --- | --- |
| **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 |
| P2100 |  |  |  |  |  |  |  |  |  | **✓** | **✓** |  |  | **✓** | **✓** |  |  |  |  |  |  |  |
| 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\_02:**

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| **Term used** | **Description** |
| ***Case Owner*** | In this BUC the Case Owner is a Competent Institution who performed the role of the Contact Institution as described by the Regulations. |
| ***Counterparty*** | In this BUC the Counterparty(ies) is(are) Competent Institutions who perform the role of Institutions Concerned as described by the Regulations. |
| ***Claimant*** | In this BUC the Claimant is the Person who wishes to claim the Survivors Pension. |
| ***Deceased Person*** | In this BUC the Deceased Person is an Insured Person who has died and upon whose insurance/residence periods the Survivors Pension is based. |

# How to start this BUC?

In order to help you understand the P\_BUC\_02 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 the deceased person was not insured in the Member State of Residence before their death you could be the Member State where they were most recently insured before their death. [I am the Case Owner. (step CO.1)](#first_step_CO) |
| 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 Survivor’s Pension and must 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 Counterparties by identifying the responsible Member States 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 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)I need to identify the Counterparty. (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 other Member State(s) you will need to consult the Institution Repository (IR). The IR provides an electronic record of all current and previous Competent Institutions and Liaison Bodies that have been responsible for the cross border coordination of social security information for each of the relevant Member States.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 the ‘Survivors Pension Claim’ – SED P2100? |
| Fill out the ‘Survivors Pension Claim’ - [SED P2100](../../../SEDs/P2100.docx) by entering all the required information. Afterwards, you send the ‘Survivors Pension Claim’ - [SED P2100](../../../SEDs/P2100.docx) to the Counterparty(ies).In the survivor’s pension claim P2100 there’s also the insured person which refers to the deceased person. The information on the insured person must also always be given in survivor’s pension claims as well as the information on the claimant.[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 invalidate a sent SED (AD\_BUC\_06)](../../../../Administrative_Sub-Processes/AD_BUC_06_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.4 What are my next steps in this process? |
| When you submitted the ‘Survivors Pension Claim’ - [SED P2100](../../../SEDs/P2100.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](#_CO.6_How_do) SED P3000 (step CO.5).[Send Report on Insurance History](#_CO.8_How_do) SED P4000 (step CO.6)[Send Insurance/Residence Periods](#_CO.10_How_do) SED P5000 to the counterparty(ies). (step CO.7)[Send Pension decision SED P6000](#_CO.8__How) (step CO.8)[Send Request additional information from one or more of the counterparties](#_CO.14_How_do) SED P8000(step CO.9)[Send Transfer additional information to one or more of the counterparties](#_CO.16_How_do) SEDP10000 (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)](file://net1.cec.eu.int/EMPL/F/F5/02%20IT%20Systems/EESSI/03%20Architecture/50.%20Business%20Architecture/Guidelines/Guidelines-V4/EESSI-BUC_Guidelines_V4/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 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 SED 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 Survivors Pension (You should not fill the others). Afterwards, you send the ‘Country Specific Information’ - [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 [SED P3000](../../../SEDs/P3000.docx) supplements the previously issued Survivor’s Pension Claim with specific detailed information needed by a Member State to support the Survivors Pension Claim.As a general rule SED P3000 should always be sent immediately after SED P2100 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)](file://net1.cec.eu.int/EMPL/F/F5/02%20IT%20Systems/EESSI/03%20Architecture/50.%20Business%20Architecture/Guidelines/Guidelines-V4/EESSI-BUC_Guidelines_V4/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 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 by entering all the required information. Afterwards, you send the ‘Report on Insurance History’ - SED P4000 to all the Counterparties. The SED P4000 is a notification of the deceased person’s insurance history in EU/EFTA Member State(s).It is filled in on the basis of the claimant’s statement about the insurance history of the deceased person 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 SED P5000. The SED P4000 should include the whole insurance history with the relevant periods of all EU/EFTA Member States where the deceased person has been working/residing (except in 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)](file://net1.cec.eu.int/EMPL/F/F5/02%20IT%20Systems/EESSI/03%20Architecture/50.%20Business%20Architecture/Guidelines/Guidelines-V4/EESSI-BUC_Guidelines_V4/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 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 to all the Counterparties. The ‘Insurance/residence periods' - SED P5000 always provides a detailed report of the insurance/residence periods of the deceased 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 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 [SED P6000](../../../SEDs/P6000.docx) is a notification of the final or provisional decision your institution has taken with regards to the claimant’s claim for Survivor’s Pension.The ‘Pension Decision’ – SED P6000 includes either a positive decision indicating the amount and frequency of payment of the 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 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 ‘Request for Additional Information’ - [SED P8000](../../../SEDs/P8000.docx) is a request for specific additional information you need to allow you to progress with the claim for Survivor’s 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 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 [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 SED P9000.) 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 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, 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 assist the Survivor's Pension claim processing under EU legislation. If you have done this then typically your next step is to [issue a Pension Decision P6000](#_CO.12_How_do) and send it to the Counterparties (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 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 SEDs P6000 Pension Decisions from other Counterparties in this case, you should have all the required information you need to make the ['Notification of Summary Note' - P7000](#_CO.18_How_do) (step CO.18) and to [issue a Portable Document P1](#_CO.17__How) (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 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 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 Survivor’s Pension Claim. There is no reply to the SED P9000 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 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.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 if additional information from a Counterparty. This information should support you in your decision making for the Pension Claim. There is no reply to the 'Transfer of Additional Information' - SED P10000 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 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 SED P9000 to any other Counterparties that received the 'Request for Additional Information ' – SED P8000.The ‘Reply to Request for Additional Information’ - [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 'Reply to Request for Additional Information’ – SED P9000 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 or with the requested SED. (Information which is communicated to other institutions without prior request has to be done with 'Transfer of Additional Information' – SED P10000.) 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 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.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 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 is filled in based on the information on the final pension decisions (SED P6000) 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 ‘Notification of Summary note’ – SED P7000 is a summary note of all pension decisions issued by the Contact institution 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) 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 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 ‘Survivors Pension Claim’ - SED P2100? |
| The process is initiated by receiving the ‘Survivors Pension Claim’ - [SED P2100](../../../SEDs/P2100.docx) from theCase Owner. The [SED P2100](../../../SEDs/P2100.docx) is a claim for Survivors Pension submitted to your 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 Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)[I want to Forward Case to another Competent Institution in my Member State (AD\_BUC\_05).](../../../../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 ‘Survivors Pension Claim’ - [SED P2100](../../../SEDs/P2100.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 SEDs 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.4_How_do)  (step CP.4)[Send Request for Additional Information SED P8000](#_CP.6_How_do)  (step CP.5)[Send Transfer of Additional Information SED P10000](#_CP.6__How)  (step CP.6)[I have received Country Specific Information SED P3000 from the Case Owner](#_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 Periods 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 Reply to 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 Add Participant to the case (AD\_BUC\_03)](../../../../Administrative_Sub-Processes/AD_BUC_03_Subprocess.docx)[I want to Forward Case to another Competent Institution in my Member State (AD\_BUC\_05).](../../../../Administrative_Sub-Processes/AD_BUC_05_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 to the Case Owner and all the Counterparties. The SED P5000 is a detailed report of the insurance (and possibly residence) periods the deceased person 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 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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| 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 ‘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 Pension.The SED P6000 includes either a positive decision indicating the amount and frequency of payment of the Survivor’s 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](#_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 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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| 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 Survivor’s Pension you have received. You can send one or more SED P8000 to the Counterparties if you have different question 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 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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| 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 Survivors 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 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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| 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/residence history‘ - SED P4000? |
| You have received the [‘Report on insurance/residence history’ - SED P4000](../../../SEDs/P4000.docx), this SED will provide you with the information from the claimant concerning the deceased person’s insurance/residence history abroad. This is provided to help to ensure all periods of insurance/residence are properly traced and included in the calculation of the Survivor’s Pension. The 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 other Counterparties in this case you should have all the required information you need to assist the Survivor’s Pension claim processing under EU legislation. If you have done this then typically your next step is to issue a Pension Decision SED P6000 and send it to the Case Owner and Counterparties (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 the ‘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 SEDs P6000 Pension Decisions from the Case Owner and other Counterparties in this case then you should expect to [receive the 'Notification of Summary note' - SED P7000 from the Contact Institution](#_CP.19_What_should) (step CP.20).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.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 SED P8000. Typically you must [reply to the request with a 'Reply to Request for Additional Information' – 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 Survivor’s Pension Claim. There is no reply to the SED P9000 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 Survivor’s Pension Claim. There is no reply to the SED P10000 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 ‘Reply to Request for Additional Information’ - [SED P9000](../../../SEDs/P9000.docx) to the institution that sent you the SED P8000. In addition you must send your P9000 to any other institution that received the SED P8000. The ‘Reply to Request for Additional Information’ - [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 'Request for Additional Information '- SED P8000. Hence SED P9000 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. (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](#_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 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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| 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 ‘Notification of Summary note’ – 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\_02

Click [here](../../../%20BPMN_Diagrams/P_BUC_02_Diagram.pdf) to open the BPMN diagram(s) for P\_BUC\_02.

# Structured Electronic Documents (SEDs) used in the process

The following SEDs are used in P\_BUC\_02:

* [SED P2100 - Survivors Pension Claim](SEDs/P2100.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\_02:

* <PDs/P1.docx>

# Horizontal sub-processes

The following horizontal sub-process is used in P\_BUC\_02:

* [H\_BUC\_04 - Reimbursement of Administrative check or Medical Information](../Horizontal_Sub-Processes/H_BUC_04_Subprocess.docx%22)
* [H\_BUC\_07 - Notification of Death](../../../../Horizontal_Sub-Processes/H_BUC_07_Subprocess.docx)
* [H\_BUC\_08 – Medical Information](../Horizontal_Sub-Processes/H_BUC_09_Subprocess.docx)

# Administrative sub-processes

The following administrative sub-processes are used in P\_BUC\_02:

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