



Request for services

Before you complete this form please read the Guidance Notes, which can be found on the Guidance Notes tab.

You must complete all mandatory fields marked with an * in order for us to process your request.

Part 1 - Your request

Which service do you require? *

Member's last day of service
(DD/MM/YYYY) *

Name of employer/organisation *

Part 2 - Member details

Title *

First name *

Surname *

Member's date of birth
(DD/MM/YYYY) *

National Insurance number

Which scheme is the member in? *

Is the member male or female? *

Home address

Postcode

Telephone number

Email address

Part 3 - Additional member details

Is the member paying added pension contributions? *

Is the member paying added years contributions? *

Has the member transferred funds from another scheme into their pension? *

Has the member ever worked part time hours or on a part time basis? *

Does the member have a previous Principal Civil Service Pension Scheme (PCSPS) award? *

Other Information

Section 4 - Additional information

No additional information required - continue at Part 5

Section 5 - Details of employer or Shared Services

By completing this form you are confirming to the best of your knowledge, the information provided is both complete and correct.

Name of person submitting form *

Employer or Shared Service *

Telephone number *

Email address *

Date *

Section 6 - Submitting your form

Step 1: Complete all fields including mandatory fields marked with an *.

For further information, refer to the Guidance Notes.

Step 2: Save your form as a PDF using the following naming convention:

RFS_MemberSurname (for example RFS_JONES).

Step 3: Send the form to us using Contact Us..

Section 7 - Civil Service Pensions internal use only

CTI (Civil Service Pensions use only)

Key Event Date (Civil Service Pensions use only)

Guidance Notes

You should submit a Request for Services form for the following:

To request a retirement quote for members leaving the scheme:

- at Normal Pension Age (NPA)
- before NPA, also known as Actuarially Reduced Retirement (ARR)
- due to ill health.

To notify us of a death in service.

To request an efficiency dismissal quote (with or without compensation).

To notify us of someone who has left employment with more than three months service.

To request a Cash-Equivalent Transfer Value quote (CETV) for divorce.

To request a Sick Pay at Pension Rate (SPPR) estimate when paid sick leave has ended.

To request an early payment of preserved award (on ill-health grounds) quote for a deferred member.

In exceptional circumstances, to request a death benefits estimate, efficiency dismissal estimate, or ill-health retirement estimate.

You should not submit a Request for Services form for the following:

To notify us of:

- a change in personal details (such as a member's name, address, or marital status)
- a change in working hours (for example moving from part-time to full-time)
- a new joiner.

The above information should be submitted via a monthly interface.

To notify us of someone who has opted out of the Civil Service pension arrangements. Notification of this should be sent using the 'Opting Out' form .

To notify us of a request for partial retirement. Notification of this should be sent using the 'CSP15' form.

How to complete a Request for Services form

Part 1 – Your request

In this section please select the type of service you require, the date the request is effective from and the name of your employer/organisation.

Part 2 – Member details

Please provide up to date details for the member when you complete the form (for example if the member is due to leave service, you must provide their personal email address and contact telephone number).

Part 3 - Additional member details

Providing additional information will help us to process your request. If possible, please provide details of the following:

- added pension contributions
- added years contributions
- confirmation of any funds transferred in from another scheme
- working pattern
- previous Principal Civil Service Pension Scheme (PCSPS) benefits.

If you are unable to provide these details, please write 'Unknown'.

Other information - You can use this field to provide any further information that may support your request, for example, information about allowances or bonuses, any additional details relating to next of kin/death beneficiaries, or working pattern.

Part 4 – Additional Information (this applies to a death in service notification, divorce quote, ill-health retirement quote, or an efficiency dismissal with compensation quote)

You will be required to provide the member's death beneficiary nomination and next of kin/personal representative if you request a death in service notification. If the member was not in the classic section of the PCSPS, and had a death benefit nomination, you will also need to provide details of the deceased's line manager.

If you request a divorce quote, you will be asked to confirm if the divorce was heard in an English/Welsh court or a Scottish court. If the divorce was heard in a Scottish court you will need to provide the marriage start date and date of separation to calculate the Cash Equivalent Transfer Value (CETV) quote correctly.

If you request an efficiency dismissal with compensation quote, you will be asked to confirm whether the member has an ongoing ill-health appeal.

If you request an ill-health retirement quote, you will be asked to confirm whether the request is the result of a successful appeal, and if the member has previously been dismissed with compensation.

Part 5 – Details of employer or Shared Services

You are required to provide your contact details and confirmation that the information you have provided is complete and correct. Here, you will be required to provide your email address, Task ID or central group email address.

Part 6 - How to submit your Request for Services form

Before submitting your form, you must complete all mandatory fields with an *. An error message will appear in the freeze pane until all mandatory fields have been completed. In some instances write 'Unknown'. If you submit your form with incomplete mandatory fields we will be unable to process your request. For more information regarding error messages please see below.

Part 7 - For internal use only

This section will auto-populate for use by Civil Service Pensions.

Important Information

Error messages

When you complete this form you may see one or more of the following error messages displayed at the top of the form in red text.

- **'The member's age at their last day of service means that they are ineligible for a Normal Pension Age (NPA) retirement quote. Please refer to the guidance notes for further details.'** You have selected a NPA retirement quote and the member is not at the minimum age to take NPA retirement. Check that the member is at least one day before NPA for their scheme on their last day of service.
- **'The member's age at their last day of service means that they are ineligible for an Actuarially Reduced Retirement (ARR) quote. Please refer to the guidance notes for further details.'** You have selected an ARR quote and the member is not at the minimum or maximum age to take ARR. Check that the member is at the minimum or maximum age to take ARR for their scheme on their last day of service.

Warning messages

When you complete the form, the following warning messages may display at the top of the form.

- **'Please ensure that the member has been informed that they will be required to pay back any dismissal compensation paid to them, following a successful ill-health retirement application appeal.'** This message appears when a member has an ongoing ill-health application appeal. It is your responsibility to tell the member that they will need to pay back any dismissal compensation if their appeal is successful. Please refer to the Employer Pension Guide 6.3.8 to 6.3.11 on the Civil Service website www.civilservicepensionscheme.org.uk
- **'Please ensure that the member has been informed that if they have previously been dismissed with compensation, they will be required to pay back their compensation.'** This message appears when an ill-health retirement quote has been requested as a result of a successful appeal, and the member has previously been dismissed with compensation. It is your responsibility to tell the member they will need to pay back their compensation if their ill-health application is successful. Please refer to the Employer Pension Guide on the Civil Service website for further details.

Providing additional documents

- **'Please provide a medical certificate received from the Scheme Medical Advisor (SMA) with this form. Civil Service Pensions will be unable to process your request without this certificate.'** You must provide a medical certificate for normal ill-health and severe ill-health cases when requesting either an ill-health retirement quote or an early payment of preserved award (on ill-health grounds) quote. Please ensure that this certificate is legible. This can be scanned and sent into us by email along with the Request for Services form.
- **'Please supply a Death Benefit Nomination (DBN) form.'** You must provide a DBN when requesting a death in service notification and you have indicated on the form that the member has a death benefit nomination. This can be scanned and sent into us by email along with the Request for Services form.