

EUROPEAN COMMUNITIES

**Social security
for migrant workers**

Pensioners



Guide No 4

Guide for pensioners who were formally employed persons and for persons claiming a pension who are residing or staying temporarily in a Member State of the European Communities

Regulations 1408/71 and 574/72 were drawn up by the Council of the European Communities in accordance with the Treaty which established the European Economic Community, to ensure that:

- (a) you receive the social security pension which you have earned as an employed person in one or more Member States of the European Communities;
- (b) you and the members of your family receive sickness or maternity benefits including medical care (eg., from a general practitioner or a specialist, drugs and medicines, dental treatment, hospital treatment etc.);
- (c) you receive any pension increases and family allowances to which you are entitled in respect of dependent children;

while you are in any one of the nine Member States, regardless of whether you have been insured there, reside there permanently or are on a temporary visit.

This Guide explains your entitlement to medical care and how to go about obtaining it.

1. The EEC Regulations apply to you if you are:

- (a) a pensioner or a claimant to a pension who has previously been insured as an employed person,¹ and if you are either a national of one of the Member States or a stateless person or refugee and reside in one of the Member States;
- (b) a member of the family of such a pensioner or of someone claiming a pension; or
- (c) the survivor of an employed person, or of a pensioner who was formally an employed person.

¹ In some Member States, these Regulations also apply to pensioners who have not been employed persons. For further details, apply to your sickness insurance institution.

2. The Member States of the European Communities (EEC) are:

Belgium, Denmark, Germany, France, Ireland, Italy, Luxembourg, the Netherlands and the United Kingdom of Great Britain and Northern Ireland (including Gibraltar).

- 3. (a) Your right to medical treatment** if you reside in a Member State from which you are not entitled to a pension or if the pension payable by that State does not entitle you to medical treatment.

If you receive a pension from one or more Member States you should be able to receive medical treatment from a general practitioner or specialist, drugs and medicines, dental treatment, hospital treatment etc., for yourself and the members of your family who are dependent on you from the institution responsible for sickness and maternity insurance where you reside, even if you do not fulfil the conditions laid down by the legislation of that Member State. To receive such treatment you must have been entitled to it from the Member State or one of the States which pays your pension as if you had been residing in that State.

(b) What you must do

You must register with the institution which is responsible for sickness insurance (sickness fund) where you reside, by submitting Form E 121 to that institution.¹ This form is obtainable from the institution or one of the institutions which pays you your pension.² The instructions on page 4 of the form tell you, among other things, the institutions to which you should submit the form.

When applying for medical treatment, you may have to provide evidence that you are entitled to a pension. This can be done by producing the receipt or counterfoil from your last payment.

- 4. (a) Entitlement to medical treatment for members of your family who are dependent on you but who reside in a Member State other than the State in which you reside**

Members of your family may receive medical treatment from a general practitioner or a specialist, drugs and medicines, dental treatment, hospital treatment etc., in the Member State where they

¹ If you reside in the United Kingdom, the institution which pays your pension will send Form E 121 direct to the appropriate institution. You should register with a doctor of your choice and do not need Form E 121 to do so.

² If you receive a United Kingdom National Insurance pension you will be sent Form E 121 automatically, unless you live in Ireland where you do not need Form E 121.

reside even though you reside in another Member State, provided you are entitled to these benefits from one Member State. Medical treatment is provided by the institution responsible for sickness insurance in the place where the members of your family reside, as if you were insured there.

(b) What the members of your family must do

The members of your family must register with the institution responsible for sickness insurance (sickness fund) where they reside. To do so they must submit Form E 122 together with any other documents which may be required by the sickness institution.¹ This form is issued by the sickness insurance institution of the State where the pensioner resides. The instructions on page 3 of the form indicate, among other things, the institution to which they should submit the form.

5. (a) Entitlement to medical treatment if you or the members of your family who are dependent on you are staying temporarily in another Member State

If you or the members of your family stay temporarily in another Member State, you or they are entitled to medical treatment from a general practitioner or a specialist, drugs and medicines, dental treatment, hospital treatment etc. provided by that State, provided that you are entitled to these benefits from one of the Member States which pays your pension.

The treatment you receive is that normally provided by the sickness insurance institution of the place in which you are staying.

(b) What you must do

You or the members of your family must take Form E 111 issued by the insurance institution of the place where you reside to the institution of the place where you are staying. It is important to obtain this form before you set out² otherwise you risk having problems when applying for treatment. The instructions on page 2 of the form tell you, among other things, the institution to which the form should be submitted. For further details see the European Communities Guide No 2.

¹ If the members of your family reside in the United Kingdom, Form E 122 will be issued direct to the appropriate institution. Your family should register with a doctor of their choice and will not need Form E 122 to do so.

² This form is not required if you are staying in the United Kingdom. Similarly, you do not need this form if you are a United Kingdom national who is going to Ireland or Denmark.

6. Entitlement to medical treatment while a pension application is being considered

If you submit an application for a pension in a Member State and if your right to medical treatment from a general practitioner or a specialist, drugs and medicines, dental treatment, hospital treatment etc., under the legislation in accordance with which you received these benefits ceases while your application is being considered, you and the members of your family may possibly still benefit in certain circumstances. This applies also to members of your family if they apply for a pension after your death. For further details, apply to the sickness insurance institution (sickness fund) of your place of residence.

N.B. In Germany, Ireland and the United Kingdom you may also be entitled to maternity benefits in cash.

For further details, apply to the following institutions:

In Germany: your sickness fund (Krankenkasse)

In Ireland: the office of the Department of Social Welfare

In the United Kingdom: *in Great Britain:*

Department of Health and Social Security
Overseas Branch, Newcastle Upon Tyne
NE98 1YX

In Northern Ireland:

Department of Health and Social Services
Overseas Branch, Stormont, Belfast BT4
3SN

Social Security guides for nationals of the Member States of the European Communities moving from one Member State to another

• Guide No 1 — General guide

This guide sets out the rights and obligations with regard to social security of employed persons going to work in a Member State of the European Communities.

There are nine separate booklets, each containing information concerning one Member State.

• Guide No 2 — Temporary stay

This guide gives information for persons going to a Member State of the European Communities to stay there for a short period (holidays, family visits, business trips).

• Guide No 3 — Workers posted abroad or employed in more than one Member State

This guide is intended for posted workers, international transport workers and other workers regularly employed in more than one Member State (e.g. commercial travellers).

• Guide no 4 — Pensioners

This guide is designed for pensioners who were formerly employed persons and for pension claimants, who reside or stay temporarily in a Member State of the European Communities.

• Guide No 5 — Members of the family

This guide is intended for members of a worker's family who reside in another Member State of the European Communities than the worker.