

NHS Pensions - New employee questionnaire

As part of the recruitment process, all new employees, staff transferring in from another NHS employer and existing NHS employees must complete this questionnaire as fully as possible.

The NHS Pension Scheme legislation requires employers to contractually enrol all new eligible employees into the NHS Pension Scheme on commencement of their employment. The Pensions Act 2008 requires those employees who cannot join the NHS Pension Scheme to be automatically enrolled into an alternative pension scheme. In order to ensure that you are correctly enrolled your employer needs to establish your current NHS pension status.

Please note that the information provided will only be used for local and central pensions/payroll administration purposes to determine your eligibility criteria to join the NHS Pension Scheme.

Please use the completion notes whilst completing the form.

Employer name	<input style="width: 100%;" type="text"/>
Your full name	<input style="width: 100%;" type="text"/>
Previous surname(s)	<input style="width: 100%;" type="text"/>
Membership SD Number (if known)	<input style="width: 100%;" type="text"/>
National Insurance number	<input style="width: 100%;" type="text"/>
Date of birth	<input style="width: 100%;" type="text"/>
Email address	<input style="width: 100%;" type="text"/>
What is your new job role / title	<input style="width: 100%;" type="text"/>
Date new role will start	<input style="width: 100%;" type="text"/>

Q1	Have you ever been in the NHS Pension Scheme or worked in a role which you were entitled to be a member? (agency work is not applicable)?	Yes <input type="checkbox"/> Go to Q2	No <input type="checkbox"/> Go to Q10
Q2	Are you still in this employment?	Yes <input type="checkbox"/> Go to below	No <input type="checkbox"/> Go to Q3
	Will this continue at the same time as your new role?	Yes <input type="checkbox"/> Go to Q4	No <input type="checkbox"/> Go to Q3
Q3	What date did you leave, or are you due to leave, your last employment with the NHS?	<input style="width: 100%;" type="text"/>	Go to Q4

Q4	Please indicate the contract type of any other employment(s)	Full time	Part time	Bank	Self employed
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Go to Q5	Go to Q5	Go to Q5	Go to Q5

Important: If you change your hours or leave your other employment(s) it is your responsibility to advise the Payroll team as this may affect your eligibility to a pension scheme.

Q5	Please provide the name and contact details of your other employer(s) along with how many hours you are (or were) contracted to work. If necessary please continue on a separate sheet.		
	Name	Contact details	Contracted hours
Go to Q6			

Q6	When you were previously a member of the NHS Pension Scheme did you claim any NHS retirement pension benefits (other than on redundancy or interest of efficiency grounds)?	Yes <input type="checkbox"/> See below	No <input type="checkbox"/> Go to Q7
	Please indicate which NHS retirement benefit you are in receipt of: <input type="checkbox"/> Ill health <input type="checkbox"/> Retirement (Early or Age) <input type="checkbox"/> Partial Retirement Please indicate which Section or Scheme you were a member of: <input type="checkbox"/> 1995 Section <input type="checkbox"/> 2008 Section <input type="checkbox"/> 2015 Scheme <input type="checkbox"/> Not Known <div style="text-align: right;">Go to Q7</div>		

Q7	Have you previously been made redundant from an NHS employment?	Yes <input type="checkbox"/> See below	No <input type="checkbox"/> Go to Q8								
	Date of redundancy	<table border="1" style="width: 100%; text-align: center;"> <tr> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;">/</td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;">/</td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> </tr> </table>				/			/		
		/			/						
Did you take an NHS Pension?		Yes <input type="checkbox"/> See below	No <input type="checkbox"/> Go to Q8								
Which NHS Pension Scheme did you take your benefits from?		<input type="checkbox"/> 1995 Section	<input type="checkbox"/> 2008 Section								
		<input type="checkbox"/> 2015 Scheme	<input type="checkbox"/> Not known								
Name of NHS employer made redundant from											
		Go to Q8									

Q8	Do, or did you, have any NHS Money Purchase Additional Voluntary Contribution (NHS MPAVC) arrangements in place through the NHS Pension Scheme with Utmost (previously Equitable Life), Prudential or Standard Life?	Yes <input type="checkbox"/> See below	No <input type="checkbox"/> Go to Q9
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Please contact your NHS MPAVC provider if you wish to continue to pay your additional contributions. You will need to advise them of your new employer so they can provide details for payroll deductions to continue. (Go to Q9)

Q9	Do you have an Added Years contract, Additional Pension purchase or Early Retirement Reduction Buy Out (ERRBO) in place?	Yes <input type="checkbox"/> See below	No <input type="checkbox"/> Go to Q10
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If your answer is 'yes' please provide us with a copy of your contract. (Go to Q10)

Q10	In your new post will you be applying for Mental Health Officer status (MHO)?	Yes <input type="checkbox"/> See below	No <input type="checkbox"/> Go to Q11
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If you had previous MHO status please provide the date the role ended

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If you have never held MHO status your new post will not qualify for this status. (Go to Q11)

Q11	In your new post will you be applying for Special Class status (SCS)?	Yes <input type="checkbox"/> See below	No <input type="checkbox"/> Go to Q12
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If you had previous SCS please provide the date the role ended

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If you have never held SCS your new post will not qualify for this status. (Go to Q12)

Q12	Have you ever taken a refund of NHS Pension benefits?	Yes <input type="checkbox"/> See below	No <input type="checkbox"/> Go to Q13
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Please provide dates of previous NHS Pension Scheme membership which was refunded (space for additional dates below)

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Q13	Do you have any previous pension rights that you might be interested in transferring into the NHS Pension Scheme?	Yes <input type="checkbox"/> See below	No <input type="checkbox"/> Go to Part 2
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If your answer is 'Yes', you should download the Transfer In Guide and application pack from our website at: www.nhsbsa.nhs.uk/nhs-pensions. However, it is important to note that this can only be done within the first 12 months of becoming eligible to join the Scheme. (Go to Part 2)

Part 2 Declaration

I confirm I will inform my employer (or Employing Authority) if my employment position with other NHS organisations changes.

Signature _____

Date

Please make sure this form is provided by the commencement of your employment to enable the correct assessment of your pension position.

The form should be returned to:

Employer stamp

How we use your information

The NHS Business Services Authority – NHS Pensions will use the information provided for administering your NHS Pension Scheme membership and processing payment of your NHS pension benefits. We may share your information to administer and pay your NHS pension, enable us to prevent and detect fraud and mistakes, for debt collection purposes, or as required by law. For more information about who we share your information with and how long we keep your personal data and your rights, please visit our website at www.nhsbsa.nhs.uk/yourinformation

Completion notes

These completion notes are provided to assist you in completing the new joiner questionnaire.

Please complete the questionnaire as fully as possible so that the correct assessment can be made.

Q1 – This question is to establish if you have any previous NHS Pension Scheme membership at the date of starting this new employment.

Q2 – This is to establish whether you will have any other NHS employments at the same time as your new role.

Q3 – This is to ensure you do not have an overlapping employment.

Q4 – You can only be pensionable in this Scheme up to whole time, therefore it is important that your employer knows how many hours you work in your other employment(s). Please make sure that you keep your employer/payroll informed if the situation changes.

Q5 – If you are continuing to work in another NHS post we need to know who your other NHS employment is with. This is important as there are reasons why you may not be eligible for the NHS Pension Scheme in two employments. The name of your other employer may be the same as the one you are starting with. Please note that if you are working for an NHS organisation through an employment agency, this does not count as NHS employment.

Q6 – If you are in receipt of any NHS pension benefits then you may not be eligible to rejoin the NHS Pension Scheme. However, by providing the information requested we will be able to make the correct assessment. We ask you to identify which Section or Scheme you were in (1995 Section, 2008 Section or 2015 Scheme) but if you are unsure then please tick the 'Not known'.

Q7 – NHS service that has been counted in the calculation of a redundancy payment needs to be declared to ensure the correct assessment of your service. If you are in receipt of an NHS Pension as the result of redundancy, this will impact the assessment.

Q8 – If you have Additional Voluntary Contribution (AVC) arrangements with either Equitable life, Prudential or Standard Life through the NHS Pension Scheme then you need to inform the AVC provider that you are changing employer to ensure continuity can be considered.

Q9 – If you have either Added Years, Additional Pension purchase or Early Retirement Reduction Buy Out (ERRBO) through the NHS Pension Scheme it is essential that you confirm the details and provide a copy of the contract that was provided to you when you commenced the arrangement to ensure continuity of the arrangement.

Q10 – Please note that Mental Health Officer (MHO) status no longer applies to any post commenced after 6 March 1995. However, if you have previously held a post that attracted MHO status and you believe the new post also qualifies for MHO status then you need to indicate this by ticking 'Yes' and completing the details of the previous employment.

Q11 – Please note that Special Class status (SCS) no longer applies to any post commenced after 6 March 1995. However, if you have previously held a post that attracted SCS and you believe the new post also qualifies for SCS then you need to indicate this by ticking 'Yes' and completing the details of the previous employment.

Q12 – Refunded membership may be included in your qualifying membership (membership counting towards your maximum allowed membership) but will not be included in the calculation of your pension benefits. Also, should you have taken your refund within the last 6 months you are entitled to pay it back should you wish to increase your current membership of the Scheme.

Q13 – You may be able to transfer other pensions into the NHS Pension Scheme, however it is important to note that this can only be done within the first 12 months of becoming eligible to join the Scheme.

If you would like to consider your option to transfer benefits, please tick the 'Yes' box and download the Transfer In Guide and application pack. If you say no but decide at a later date that you wish to consider a transfer (within the 12 month deadline) then you can obtain the Transfer In Guide and application pack from your employer or the NHS Pensions website (www.nhsbsa.nhs.uk/nhs-pensions). If you have previous NHS pension membership within England and Wales this will be automatically added to any new membership in the NHS Pension Scheme. If you have previous membership of the NHS Pension Scheme in Scotland or Northern Ireland, this will not be automatically linked. You must apply to transfer these benefits if you would like your membership to be added to your new membership in the NHS Pension Scheme (England and Wales).

If you wish to transfer from a scheme that participates in the Public Sector Transfer Club, please note that you must 'elect to proceed' with this transfer within 12 months of becoming eligible to join the NHS Pension Scheme (an election to proceed is not a request for an estimate, it is the signed option form requesting payment of the transfer value).

Once the assessment has been made, you will be notified by your employer by the first pay day which Scheme you have been enrolled in, what the Scheme features are, the contribution rates and your options.

Assessment is not possible until your first payment is made.

Death Benefit Nomination Forms

In the event of your death, the NHS Pension Scheme may provide for your family or a person you have nominated.

You can nominate someone to receive a lump sum on death benefit if you die using the lump sum on death benefit nomination forms.

If you have a partner, but are not married or in a civil partnership, you may also be able to nominate them to receive an adult dependant's pension using a separate form.

You can also cancel or change a previous nomination.

For further information please visit our website at www.nhsbsa.nhs.uk/member-hub/nominations where you will also find the relevant forms.