

A thick blue horizontal bar with a slight upward curve in the center, spanning the width of the page.

NHS Pensions Online (POL) Guide

8. E-Forms Overview

E-Forms can be selected by using either of the links shown on the example screen below.

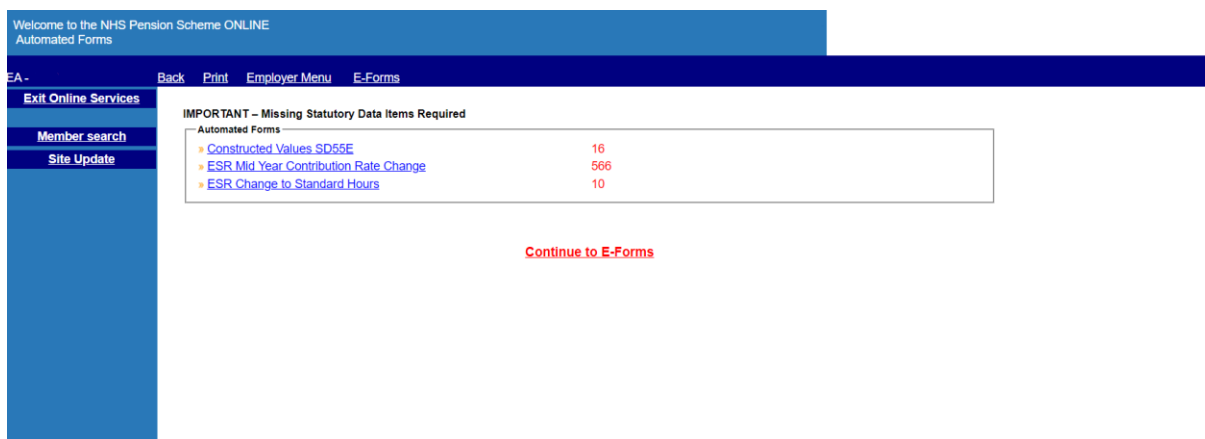


E-Forms allow you to electronically complete and submit pensions related forms to the National Health Service Business Services Authority (NHSBSA). If you require a record of the information you have submitted via E-Forms you can print out the confirmation page when the form is successfully submitted.

The submitted form then processes through NHSBSA validation and a processing system before being updated to the members' record. Not all forms process successfully and those that "fail" go into a "suspense file" and are either allocated to the NHSBSA to investigate the reason why it will not process or is allocated to yourselves for action. Forms allocated to employers for action are available in the "Error Handling" link in the main Employer Menu of Pensions Online.

Further information about dealing with errors is explained in the Guide "34. Error Handling Guide."

Before you are taken to the full menu of electronic forms you will see a list of **Automated Requests (Guide no.9)** for information from The NHSBSA, as follows:



Further detail for each of these forms is explained in the following guidance documents:

“09. Automated Requests Overview”

“10Constructed Value SD55E”

“11. ESR Mid Year Contribution Rate Changes”

“12. ESR Changes to Standard Hours”

These automated requests should be actioned as soon as possible as the NHSBSA are waiting for information to enable them to update or amend the member record.

As you complete and submit responses the number shown in red will reduce. Likewise they will increase if the NHSBSA require information for additional errors.

To see the full list of E-Forms select the link “Continue to E-Forms” and the following menu will then be displayed:

The screenshot shows the NHS Pension Scheme ONLINE e-forms interface. At the top, it says "Welcome to the NHS Pension Scheme ONLINE e-forms" and "NHS Pensions Agency". Below this is a navigation bar with "EA -", "Back", "Print", "Employer Menu", and "E-Forms". On the left, there is a sidebar with "Exit Online Services", "Member search", and "Site Update". The main content area displays a list of E-Forms:

E-Forms	
SD55	Annual Update
SD55	Terminating a period of membership
SD55G	Updating a members personal details
SD55E	Change a members employment details
SS10	JOINER - for Trusts, PCTs and GP Practice Doctors
SS14	JOINER - for practitioners
Automated Forms	Automated requests for information - IMPORTANT
RFT1	RFT1
ADP4	EA Code change
Non-updated years	Non-updated years
AW8	Pension application form
RF12	Refund application form
Employment Deletion	Delete an Open or Closed Employment
Open Employment	Open a Closed Employment
Rewind Employment	Rewind an Open Employment

Further guidance for each form is available in guides:

- 14 – Joiner form overview
- 15 – SS10 joiner form
- 16 – SS10 GP joiner form
- 17 – SS14 joiner form
- 18 – SD55 – Annual update
- 19 – SD55 – Terminating a period of employment
- 21 – SD55G – Changes to personal details
- 22 – SD55E – Amending contributions, pay and hours
- 23 - RFT1
- 25 – ADP4
- 26 – Non-updated records
- 27 – AW8 – Retirement benefit claim form
- 28- Application for refund of contributions
- 31 – GP1 (GP Practices only)