

NHS Pensions – Partial retirement supplementary form

Information for members who used the Partial Retirement Calculator between Tuesday 12 December and Friday 15 December

The Partial Retirement Calculator was released on Tuesday 12 December 2023 and available on the Partial Retirement page of our website until Friday 15 December 2023.

During this time, the calculator overstated the lump sum and benefits for some members. Only members aged between 55 and 60 who do not have special class status or Mental Health Officer status are affected. For these members, the benefits they'd receive would be less than their estimate because the calculator did not account for their normal retirement age of age 60.

If a member is affected by this issue, you should ask them to check their estimate once the Partial Retirement Calculator is available again. To allow for comprehensive user testing, the calculator will be available again in early January 2024.

Section One – Member information

To be completed by the Employer

Member number	<input type="text"/>
National Insurance No.	<input type="text"/>
EA Code	<input type="text"/>
Employer name	<input type="text"/>
Member's surname	<input type="text"/>
Member's other names	<input type="text"/>
Date of birth	<input type="text"/>

Section Two – Member pensionable pay

To be completed by the Employer

Guidance

Read the partial retirement factsheet available on our website before completing this section:

<https://www.nhsbsa.nhs.uk/employer-hub/technical-guidance/retirement>

For all applications, provide the actual pensionable pay from 1 April up to the day before the chosen payable date.

If the member worked part-time, show the total number of hours worked.

If the member has multiple employments, pensionable pay should be shown separately for each employment.

For GP's and non-GP providers, only complete the first three columns. Provide estimated pensionable pay for the previous scheme year separately to pensionable pay from 1 April based on the information on the Estimate of Pay / Profits form.

The shaded row is an example of the information required.

Date from	Date to	Actual pensionable pay in this period	Nature of change – only if moving to whole time or part time or vice versa	Total hours or sessions worked in this period
01/04/2023	31/10/2023	£24,500.00	PT	600

Chosen Payable Date

		/			/				
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Section Three – Employer declaration

To be completed by the Employer

I confirm that the member:

- has reduced their pensionable pay by at least 10% (or reduced their commitment by 10% for GPs, dental practitioners, ophthalmic practitioners, or non-GP providers)

Yes

No

- | | Yes | No |
|--|--------------------------|--------------------------|
| • has changed the terms of their employment (not applicable for GPs dental practitioners, ophthalmic practitioners, or non-GP providers) | <input type="checkbox"/> | <input type="checkbox"/> |
| • expects the new level of pay to be in place for at least 12 months from the payable date (not applicable for GPs, dental practitioners, ophthalmic practitioners, or non-GP providers) | <input type="checkbox"/> | <input type="checkbox"/> |
| • is aware of the option to only claim legacy scheme benefits (1995/2008 Section) for membership up to 31 March 2015 | <input type="checkbox"/> | <input type="checkbox"/> |

Print Name of signatory

Employer signature

Date

		/			/				
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Once the member has completed their sections you should submit this form with a completed AW8 pension application form. Do not submit via Pensions Online.

Section Four – Pension benefits

To be completed by the Member

Guidance

Read the partial retirement factsheet available on our website before completing this section:
<https://www.nhsbsa.nhs.uk/member-hub/partial-retirement>

Partial retirement is applied to your pension benefits in order. For example, if you have benefits in the 1995 Section and the 2015 Scheme, the percentage is applied to your 1995 Section benefits first and the remainder to your 2015 Scheme benefits.

Complete only **ONE** of the following sections:

a) I would like to claim only the pension benefits based on my membership in the legacy Scheme (1995/2008 Scheme) up to 31 March 2015

Please enter the percentage of your overall benefits provided by the calculator:

	%
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Note: This is a percentage of your overall benefits and will therefore always be less than 100%.

or

b) I would like to claim 100% of my pension from an individual Section or Scheme.

Please tick the relevant box(s) below:

1995 Section

2008 Section

2015 Scheme

or

c) I would like to claim the following overall percentage of my pension benefits across all Schemes:

1995 Section 2008 Section 2015 Scheme

Note: If you have pension benefits in two schemes, for example the 1995 Section and 2015 Scheme or 2008 Section and 2015 Scheme you may choose 100% of your 1995 or 2008 Section benefits and some or all your 2015 Scheme benefits.

However, you cannot claim just your 2015 Scheme pension.

You must exhaust benefits from each Section before taking a percentage from the next. Any decoupled benefits are excluded from partial retirement.

Now go to Section Five – Added benefits

Section Five – Added benefits

To be completed by the Member

Guidance

This section should **ONLY** be completed **IF** you have added benefits in the Section or Scheme that you are claiming partial retirement from.

Would you like to claim your added benefits in the Section or Scheme you are claiming partial retirement from at the same time?

Yes No

Note: If the elected percentage exhausts your 1995 / 2008 Section or 2015 Scheme benefits, the added benefits from that Section / Scheme will be automatically payable.

Section Six – Member declaration

To be completed by the Member

I confirm that I have read and understood the partial retirement factsheet.

Printed name of signatory

Member signature

Date

		/			/				
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Once you have completed this form, you should return it to your employer so they can submit it with a completed AW8 pension application form.