



NEW EMPLOYEE PENSION ELIGIBILITY QUESTIONNAIRE

This form is for Officer use.

This questionnaire captures details from new employees regarding their current status within the NHS Pension Scheme and eligibility for the Alternative Pension Scheme. This must be completed as fully as possible as part of the recruitment process.

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

Before completing this form please see the process map, 'Which pension Scheme will I be enrolled into?' and Completion Notes at the back of this form.

Employer Name

Name

National Insurance Number

Date of Birth / /

What is Your Job Role / Title

Date Employment Started / /

Part 1 - To be completed by all

Q1	Are you currently a member of the NHS Pension Scheme at the date above?	Yes <input type="checkbox"/> Go to Q2	No <input type="checkbox"/> Go to Q4
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Q2	Will you continue to have any other current NHS post (at the same time as this post) Including Bank (but excluding agency)	Yes <input type="checkbox"/> See Below	No <input type="checkbox"/> Go to Part 2
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Who is your other employer (If the same as above then go to Question 4)

Q3	Please indicate contract type of the other post(s)	Full Time <input type="checkbox"/> Part Time <input type="checkbox"/> Bank <input type="checkbox"/>
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If **full time** please go to Part 2 (but please see note below).

If **part-time** please state number of contracted hours

If **part-time** or **Bank** please go to Question 4.

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

Q4	Have you previously been a member of the NHS Pension Scheme and taken pension benefits. (Retirement, Early Retirement, Ill Health Retirement or other type of NHS Pension)	Yes <input type="checkbox"/> See Below	No <input type="checkbox"/> Go to Q6
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Please indicate which NHS Retirement Benefit you are in receipt of :

Ill Health Redundancy Retirement (Early or Age) Drawdown

Please indicate which Section of the scheme you were a member of

1995 Section 2008 Section Not Known

Q5	Do you have any existing pension rights that you would be interested in transferring into the NHS Pension Scheme? If your answer is “Yes” your employer will provide the Transfer of Benefits Booklet. However it is important to note that this can only be done in the first 12 months of joining the scheme, if a member of the 1995 Section or within the first 12 months of becoming eligible to join if in the 2008 Section.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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Q6	Have you previously been made redundant from an NHS Employer?	Yes <input type="checkbox"/> See Below	No <input type="checkbox"/> Go to Q7
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Date of Redundancy

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Did you take an NHS Pension?

Yes No

Name of NHS Employer made redundant from

Q7	Do or did you have any Additional Voluntary Contribution arrangements in place through the NHS Pension Scheme	Yes <input type="checkbox"/> See Below	No <input type="checkbox"/> Go to Q8
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Please contact your AVC provider if you wish to continue to pay AVC contributions. You will need to advise them of your new employer so they can provide details for payroll deductions to continue.

Q8	Do you have an added years contract or NHS Additional pension purchase in place? If your answer is "yes" please provide us with a copy of your contract:	Yes <input type="checkbox"/> No <input type="checkbox"/>
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Q9	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 Part 2
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If you had previous MHO status please provide the date the role ended

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If you did not have previous mental health officer status then your new post will not qualify for this status. Go to Part 2

▶▶▶ Part 2 - Declaration

I confirm that I have completed the above form to the best of my ability and knowledge and undertake to advise my payroll team in the event that I should alter the position stated above in respect of employment with any other NHS organisations.

Signature _____

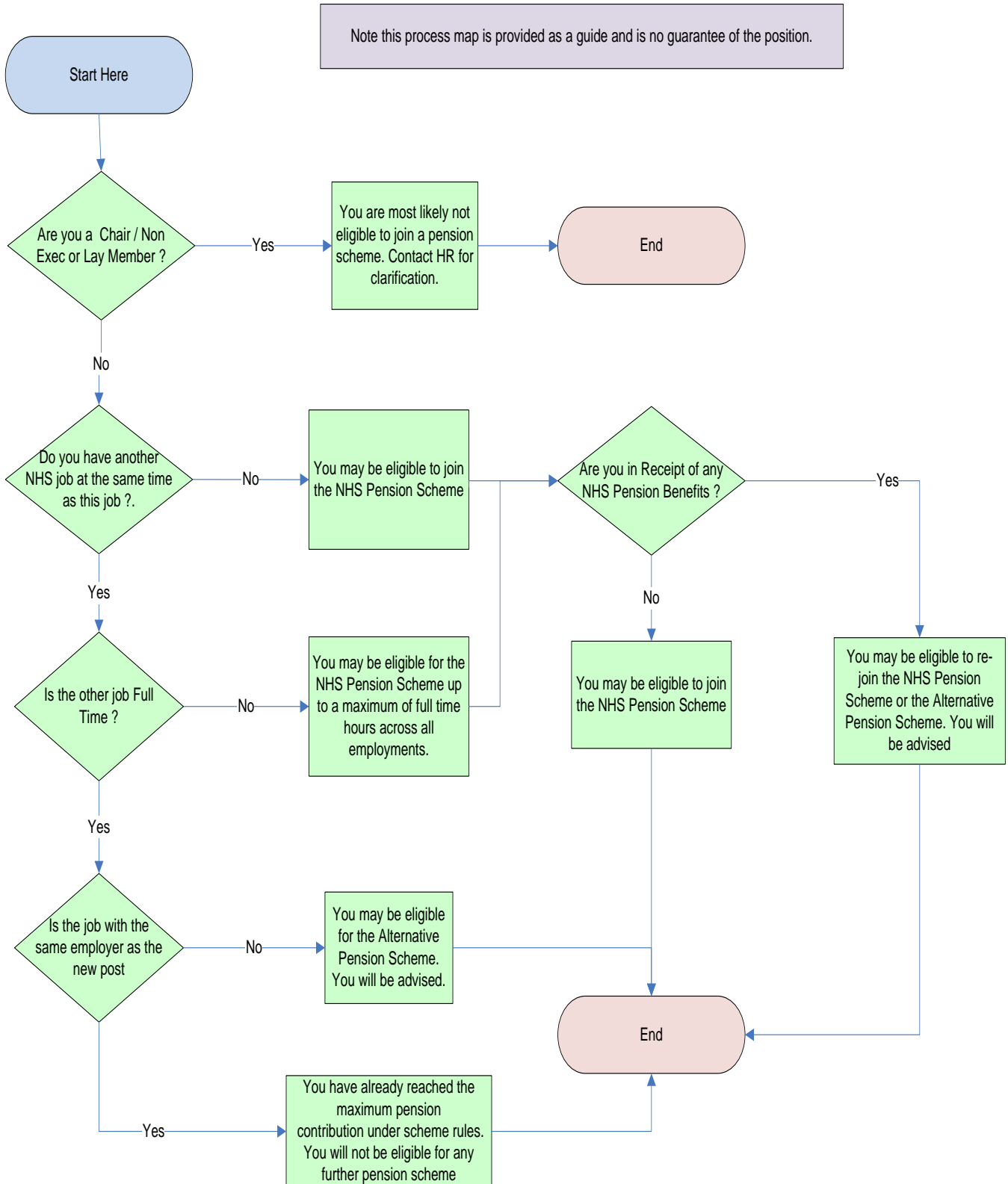
Date _____

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

The form should be returned to recruitment@scas.nhs.uk

Which pension Scheme will I be enrolled into?

To get an indication of which scheme you **may** be eligible for, the flowchart below can be used. This is provided for guidance only but due to the complex nature of the pension regulations and scheme rules the outcome cannot be guaranteed.



New Employee Completion Notes

The following completion notes are provided to assist you in completing the new joiner questionnaire. These questions are required due to the legislation contained in the Pension Act 2008 which requires employers to automatically enroll all new employees into a pension scheme on commencement.

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

Part 1

- Q1 – This question is to establish if you are a member of the NHS Pension Scheme at the date of starting this new employment. If you have left an employment that was pensionable the day before commencing this new job then you would indicate that you are not a current member. The only time you would answer 'Yes' is if you are continuing to work in another NHS job in addition to this role with any NHS organisation.
- Q2 – 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 can be the same as the one you are starting with. Please note that if you are working for an NHS organisations through an employment Agency this does not count as NHS employment.
- Q3 – It is important in the assessment that we are aware of the total contracted hours you are working in the NHS across all employments. Please indicate, for any jobs that you hold and will continue to hold beyond the starting date, what the contractual type and hours worked are. As this is an important part of your pension assessment it is essential that if the details change in any of your employments that you advise the details of the change to your payroll department shown on the bottom of the questionnaire.
- Q4 – If you have or are in receipt of any NHS Pension Benefits then you cannot normally 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 of the Scheme, you were in (1995 or 2008) but if you are unsure then please tick the 'Not Known'.
- Q5 – 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 in the first 12 months of joining the scheme, if a member of the 1995 Section or within the first 12 months of becoming eligible to join if in the 2008 Section. If you would like to consider this option please tick the 'Yes' box and a transfer pack will be provided to you. If you say no but decide at a later date that you wish to transfer service (within above parameters) then you can obtain the transfer pack from your employer or

the NHS Pensions Website (see below). If you have previous NHS Pension Service, within England and Wales this will be automatically added to any new service in the NHS Pension Scheme.

- Q6 – 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.
- Q7 – If you have additional voluntary contribution (AVC) arrangements with Prudential, Standard Life, or Equitable Life through the NHS Pension Scheme then you need to advise the AVC provider that you are changing employer to ensure continuity of the arrangement.
- Q8 – If you have either Added Years or Additional Pension Purchase 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.
- Q9 – Please note that MHO status no longer applies to any post commenced after 6 March 1995, however if you have previously held a post (in the last 5 years) that attracted Mental Health Officer (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.

Once the assessment has been made you will be notified by your employer by the first payday 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.