

## New Employee Questionnaire

**This form is for Officer use.**

The Pension Act 2008 requires employers to automatically enrol all new employees into a pension scheme on commencement of their employment. In order to ensure that you are correctly enrolled your employer needs to establish your current NHS Pension Status. 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.

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

Please use the completion notes whilst completing the form.

Employer Name

Your Name

National Insurance Number

Date of Birth  /  /

What is Your New Job Role / Title

Date New Role will start  /  /

<b>Q1</b>	Have you ever had employment which is covered by the NHS Pension Scheme (agency work not applicable)?	Yes <input type="checkbox"/> Go to Q2	No <input type="checkbox"/> Go to Q10
<b>Q2</b>	Is this an employment that will continue at the same time as your new role?	Yes <input type="checkbox"/> Go to Q3	No <input type="checkbox"/> Go to Q5
<b>Q3</b>	Please indicate contract type of this other employment(s)	Full Time <input type="checkbox"/> Go to Q4	Part Time <input type="checkbox"/> Go to Q4
			Bank <input type="checkbox"/> Go to Q4

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

<b>Q4</b>	Please provide the name and contact details of your other employer(s) <div style="text-align: right;">Go to Q5</div>
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<b>Q5</b>	When you were previously a member of the NHS Pension Scheme did you claim any retirement pension benefits?         Yes <input type="checkbox"/> See Below         No <input type="checkbox"/> Go to Q6
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"/> Drawdown (partial retirement)  Please indicate which Section of the scheme you were a member of <input type="checkbox"/> 1995 Section <input type="checkbox"/> 2008 Section <input type="checkbox"/> Not Known <div style="text-align: right;">Go to Q6</div>	

<b>Q6</b>	Have you previously been made redundant from an NHS Employment?         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 <input type="checkbox"/> See Below	No <input type="checkbox"/> Go to Q7
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Name of NHS Employer made redundant from

<div style="text-align: right;">Go to Q7</div>
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<b>Q7</b>	Do or did you have any Additional Voluntary Contribution arrangements in place through the NHS Pension Scheme with Prudential, Standard Life?         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. (Go to Q8)

<b>Q8</b>	Do you have an added years contract or NHS Additional Pension purchase in place?	Yes <input type="checkbox"/> See below	No <input type="checkbox"/> Go to Q9
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If your answer is "yes" please provide us with a copy of your contract. Go to Q9

<b>Q9</b>	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 Q10
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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. (Got to Q10)

<b>Q10</b>	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" 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, for members of the 1995 Section or within the first 12 months of becoming eligible to join the 2008 Section. (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:

Employer Stamp



## 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.

### Part 1

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 - 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.

Q4 - 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.

Q5 – If you have or 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 of the Scheme you were in (1995 or 2008) but if you are unsure then please tick the 'Not Known'.

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 either Prudential, Standard 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.

Q10 – 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 you are member of the 1995 Section
- within the first 12 months of becoming eligible to join the 2008 Section.

If you would like to consider your option to transfer benefits, please tick the 'Yes' box and a transfer pack will be given to you. 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 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.

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.

NHS Pensions Website  
<http://www.nhsbsa.nhs.uk>