

NHS Pensions Online Guide

40. Greenbury Guide

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Overview of Changes:

A new option will be available through Pensions Online (POL) to allow Employers to request Greenbury senior manager remuneration disclosures for the 2011-12 financial year via a set of bespoke screens.

This will replace the previous disclosure request method through the website.

These screens will also be used by NHS Pensions to return the requested Pension, Lump Sum and Cash Equivalent Transfer Value to each Employer.

Each Employer will only be able to view its own disclosure requests.

The functionality will be available from the 30 January 2012. Each Employer will need to nominate a user and allocate Greenbury access to that user before disclosures can be requested.

The new Greenbury screens will also support :-

- Communication between Employers and NHS Pensions concerning Greenbury queries
- Requests for re-calculation of Greenbury disclosures
- Comparison of this year's disclosure figures with last year's figures

The following paragraphs give further information about how the Greenbury access must be switched on by each Employer and about the Greenbury screens themselves.

1. Allocation of Greenbury Screen Access

Prior to the start of this year's disclosure submission on the 30 January, a staff member will need to be nominated by each Employer, and their access rights set, to allow Greenbury access.

This staff member could be a new POL user or an existing user for whom Greenbury access will be added to their overall access rights. Only one user can have Greenbury access for an Employer at a time. This is to allow any automated NHS Pensions e-mails generated by the Greenbury process to be directed to a single e-mail contact point.

If a different POL user needs to be supplied with Greenbury access rights then the previous user must have their Greenbury access switched off first. The new Greenbury user can then be allocated Greenbury access.

Access rights can be set by selection of "Administer Employer Access" from the Main Menu when logged in as an Administrator .

The next screenshot below shows the Administrator Main Menu with the relevant selection option highlighted:

Welcome to the NHS Pension Scheme ONLINE
NHS Pension Scheme Online

NHS
Pensions Agency

EA - E Back Print Employer Menu E-Forms

- Exit Online Services
- Member search
- Administer Employer Contacts
- Administer Employer Access**
- Site Update

Welcome to the NHS Pensions Online Service. Your email address is **Hannah @nhs.uk**. If this is incorrect please [click here](#) to amend.

Please select an area of the site you would like to visit

- ▶ [E-FORMS](#)
- ▶ [MEMBERZONE](#)
- ▶ [NOTIFICATIONS](#)
- ▶ [NOTICE BOARD](#)
- ▶ [ERROR HANDLING](#)
- ▶ [ESR STATUS](#)
- ▶ [CHANGE PASSWORD](#)
- ▶ [VIEW EMPLOYER CONTACTS](#)
- ▶ [VIEW PENSION CONTACTS](#)

All benefit values quoted on Pensions Online are based on the Pensionable Pay and membership details we hold as being correct. You should alert members to this fact when furnishing them with any benefit quotations. You may wish to make use of the membership statement facility by printing statements and sending them with the quotations. This way the member will be able to refer to the membership data we hold when assessing their benefit values.

Allocating Greenbury Access to a New POL User

You will then be taken to the Employer Access screen that shows your Pensions On-Line (POL) user accounts. If your nominated Greenbury user is a new user on POL then select the "Add New Access Rights" option

Welcome to the NHS Pension Scheme ONLINE
Employer Access

NHS
Pensions Agency

EA - 07 Back Print Employer Menu E-Forms

- Exit Online Services
- Member search
- Administer Employer Contacts
- Administer Employer Access
- Site Update

Employer Code 07
Address HOSPITAL
 NHS TRUST
 STREET

Post Code

[Add New Access Rights](#)

Contact Name	James Bond
Pin Number	
Email address	JB007@nhs.uk
Postal Contact	JB007@nhs.uk
Amend Administrator Details	
Contact Name	Chuck Bartowski
Pin Number	
Email address	Chuck1@nhs.uk
Account Status	Active
Greenbury User	N/A

The Administer Employer Access page will allow you to add the new user and assign them their Greenbury access by ticking the Access to Greenbury box. An e-mail address should be supplied to allow any automated Greenbury e-mails to be directed to the intended POL user.

EA - 00

Welcome to the NHS Pension Scheme ONLINE
Administer Employer Access

NHS
Pensions Agency

Back Print Employer Menu E-Forms

Exit Online Services

Member search

Administer Employer Contacts

Administer Employer Access

Site Update

Contact Name

Pin Number 02946261

E Mail Address

Access to E-Forms

Access to Memberzone

Access to RFT1 ONLY

Access to Noticeboard

Access to Confidential Noticeboard items

Delete Noticeboard items

Access to Greenbury

Password

Confirm Password

DR Cancel

Allocating Greenbury Access to an Existing POL User

If the nominated Greenbury POL user is an existing POL user then click the “Amend” button next to that user’s access details on the Employer Access screen instead. This will take you to the page that allows amendment of user access rights.

The Amend button should also be used if you want to remove Greenbury access from the current POL user (for example, where you wish to re-assign that access).

The next screen shows selection of the “Amend” button from the Employer Access screen.

Note that the Employer Access screen has also been amended to display each user’s Greenbury access status (Yes or No status, highlighted in the following example).

Contact Name	Chuck Bartowski
Pin Number	07011H33
Email address	Chuck1@gosh.nhs.uk
Account Status	Active
Greenbury User	No
<input type="button" value="Delete"/> <input type="button" value="Amend"/>	
Contact Name	Bart Simpson
Pin Number	07011VZP
Email address	Bart@gosh.nhs.uk
Account Status	Active
Greenbury User	No
<input type="button" value="Delete"/> <input type="button" value="Amend"/>	
Contact Name	Indiana Jones
Pin Number	07012GPU
Email address	I001@gosh.nhs.uk
Account Status	Active
Greenbury User	No
<input type="button" value="Delete"/> <input type="button" value="Amend"/>	
Contact Name	Temp Contact
Pin Number	07016C81
Email address	Tempcont@nhs.uk
Account Status	Active
Greenbury User	Yes
<input type="button" value="Delete"/> <input type="button" value="Amend"/>	
Contact Name	Wayne Campbell
Pin Number	07019V3N

After clicking the Amend button on the Employer Access page, you will be directed to the Amend Employer Contact screen.

The next screenshot shows the Amend Employer Contact screen with the “Access to Greenbury” tick box highlighted.

To select Greenbury access, tick this box and press Submit. An e-mail address must also be supplied so that any automated Greenbury e-mails from NHSP can be directed to the Greenbury POL user.

To remove Greenbury access, untick the Access to Greenbury box and press Submit.

Welcome to the NHS Pension Scheme ONLINE NHS Pensions Agency

Amend Employer Contact

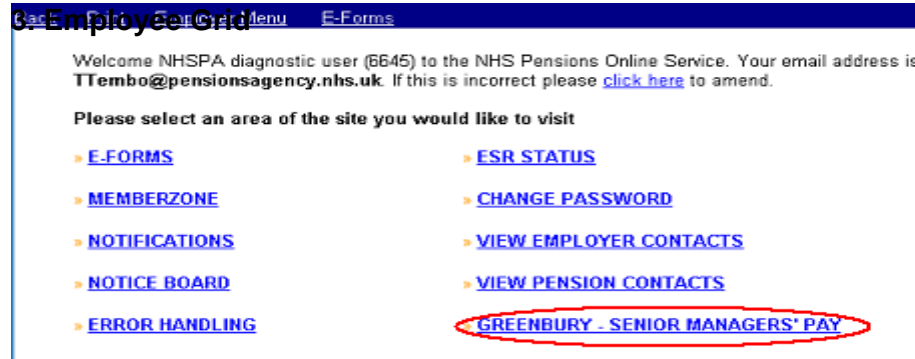
EA - 07 Back Print Employer Menu EForms

[Exit Online Services](#) Please make your amendment and click submit.

Member search	Contact Name	<input type="text" value="Temp Contact"/>
Administer Employer Contacts	Email	<input type="text" value="Tempcont@nhs.uk"/>
Administer Employer Access	E-Forms Access	<input checked="" type="checkbox"/>
Site Update	Memberzone Access	<input checked="" type="checkbox"/>
	RFT1 ONLY	<input type="checkbox"/>
	Access to Noticeboard	<input checked="" type="checkbox"/>
	Access to Confidential Noticeboard items	<input type="checkbox"/>
	Delete Noticeboard items	<input type="checkbox"/>
	Access to Greenbury	<input checked="" type="checkbox"/>

2. Greenbury Menu Access

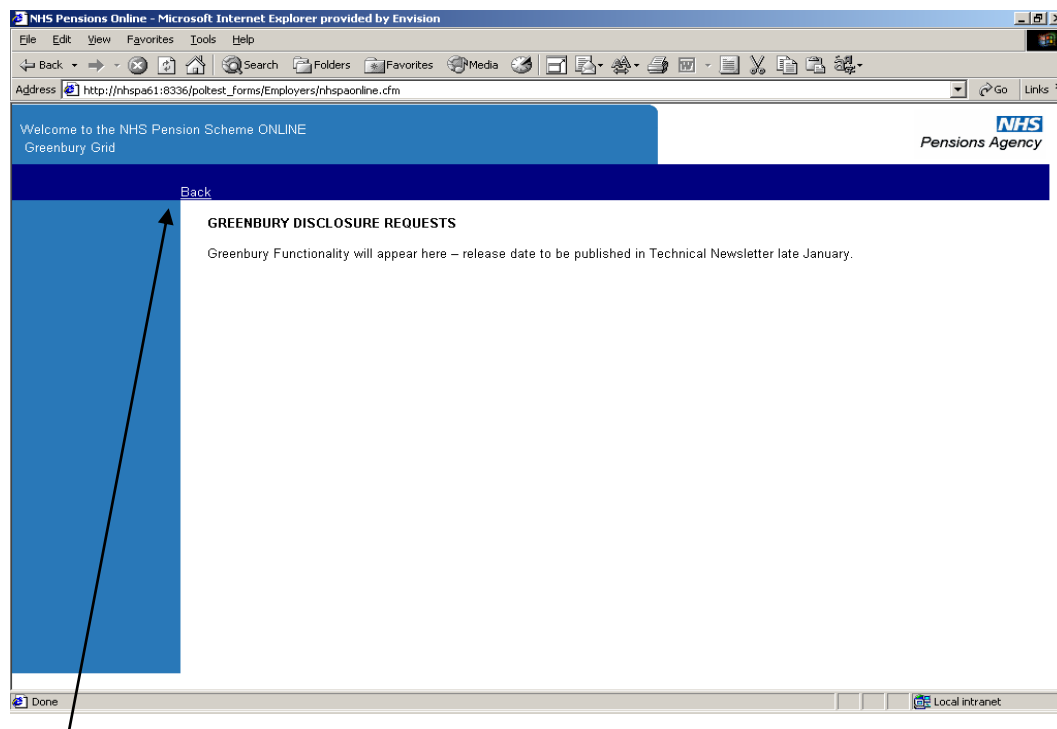
The main menu in itself has not changed. However, the nominated Greenbury user will have an additional menu option displayed as highlighted below. Other POL users will not be able to see this additional menu option.



On selection of the Greenbury menu option, the nominated user should be taken to the Employee Grid page first.

Interim page display

The exception to this will be in the run-up to 30 January 2012 when Employers are due to commence sending their disclosure requests - the Greenbury user may see the following interim message displayed to them instead:



The User may select the Back option to leave the displayed page.

3. Employee Grid – Under Normal Usage

This section documents the normal Greenbury Employee Grid display to make disclosure requests for financial year 2011-12. This will be available from 30 January 2012.

The first time that the Employer selects the Greenbury menu option, the Employee Grid will be blank except for relevant column headings.

This is because the Grid is used to display details of members for whom a disclosure has already been requested for the current year's Greenbury disclosure exercise.

Once disclosures begin to be requested, the Grid will display :-

- the details that NHS Pensions required to be input for each member
- the current status for each requested disclosure
- the calculated pension, lump sum and CETV values returned by NHS Pensions.

The Employee Grid has an "Add New" option to allow member disclosures to be entered for the first time for this year's Greenbury.

The Employee Grid has an “Add New” option to allow member disclosures to be entered for the first time for this year’s Greenbury.

[Back](#) [Print](#) [Employer Menu](#) [E-Forms](#)

GREENBURY DISCLOSURE REQUESTS

You are currently logged in as an Employer for EA 1234. Below is a list of current disclosures

NI Number	Surname	Forename	SD Number	TPP	WT / PT	Submitted	Status	Pension	Lump Sum	CETV
AA123456A	BAKER	PAULO	44123456	12345.67	30 / 37.5	27-MAR-2010	Completed	12345.67	12345.67	12345.67
AB123456A	BREZESKI	JAMES	45123456	12345.67	WT	20-FEB-2010	Completed	12345.67	12345.67	12345.67
AC123456A	GETANEKI	SUSANA	46123456	12345.67	28 / 37.5	15-MAR-2010	Waiting			
AD123456A	HOSSEINI	LUDO	47123456	12345.67	WT	01-MAR-2010	Queried	12345.67	12345.67	12345.67
AE123456A	ROONEY	WAYNA	48123456	12345.67	4 / 11	15-MAR-2010	Completed	12345.67	12345.67	12345.67

[\[Add New...\]](#) or click on NI Number for more options

Alternatively, the user can click on a displayed NI Number to enquire on an existing disclosure request.

Statuses displayed on the Disclosure Request Grid

Each disclosure request will have one of the following statuses displayed. The initial status for a disclosure will be “Waiting”.

Status	Definition
Waiting	You have added a disclosure request but the pension, lump sum and CETV results have not yet been calculated and returned for the requested member disclosure
Completed	The calculation of a member’s pension, lump sum and CETV have been completed and NHS Pensions have returned those results to you
Queried	You have raised a query about member information to be supplied with the disclosure request
Responded	NHS Pensions’ Greenbury team has responded to your query

4. Member Selection

If the user selects the “Add New” option on the Employee Grid then they will be taken to a Member Selection screen where they can key in the NI Number – or, if known – the NHS Pensions SD Number for that member. The user then presses “Submit” and will be taken to the Employee Detail screen once the entered.

Back [Print](#) [Employer Menu](#) [E-Forms](#)

You are currently logged-in as Administrator for EA1234

Please enter NI number **OR** SD Membership Number and press submit.

NI Number

SD Membership Number
(e.g. 12345678)

The Member Selection screen will not allow an Employer to add the same NI Number or SD Number twice. If a duplicate is entered the message “This employee has already been requested, please select appropriate NI Number if you wish to recalculate figures or raise a query” will be displayed.

This validation check will not be applied across Employers. Different Employers will be able to request disclosure for members who have moved from one Employer to another Employer during the financial year.

If the member is :

- not found for the NI Number or SD Number or
- the member is found but there are no employment details that match the EA Code of the Employer

the message “Details not found, do you want to continue as a manual request case?” will be displayed along with Yes and No selection fields.

Selecting “Yes” will cause an unpopulated Employee Detail screen to be displayed that will allow the Employer to manually enter all required details for the disclosure request.

Selecting the “No” option will take the POL user back to the Employee Grid page.

5. Employee Detail – Add New Disclosure Request

The following fields will be automatically pre-populated using the Member database:

- Surname
- Forename
- SD Number
- Start Date (see Note 1 below)
- End Date (see Note 2)
- Working Pattern at last update (see Note 3)
- Actual hours/Sessions for part time staff
- Standard hours/Sessions for part time staff

Note	Field	Comments
1	Start Date	Start date will be pre-populated with the start date of the latest period of employment with the requesting Employer OR 1 April of the start of the reporting period year if this date is later.
2	End Date	End Date will be pre-populated with : <ul style="list-style-type: none"> • the end date of the latest period of employment for the requesting Employer or • 31 March of the end of the reporting period if this end date is earlier or if the employment is still open.
3	Working Pattern	Working Pattern is pre-populated based on the latest Whole Time / Part Time status we hold for the selected member's employment

The screenshot below displays the pre-populated view that the Greenbury user will normally see when they enter the "Add New Disclosure Request" screen.

The user will be able to select the "Cancel" button at any time to leave the screen without adding or updating the disclosure request.

The screen will validate that all required data has been entered when the user selects the "Submit" button. If all required data has not been entered then the user must take corrective action and re-submit or else select "Cancel".

If no open employment with the requesting Employer could be found for the selected member during the reporting period then a message to this effect will have been displayed. The screen content will not pre-populate. The user may continue and enter the data manually or select "Cancel" from the screen. If the user elects to enter the requested information manually then they will need to key values in all the required fields including those that would have pre-populated.

5.1 Pre-populated Add Employee Request screen sample

Back		Print		Employer Menu		E-Forms	
National Insurance Number		JD123456A					
SD Number		44123456					
Forename		Doc					
Surname		Holiday					
Start Date (DD/MM/YYYY)		01/04/2009					
End Date (DD/MM/YYYY)		31/03/2010					
Marital status		Please select					
Date of Divorce							Only required for males with service prior to 25.03.1972
Working Pattern at last update		Part Time		Actual Hours / Sess	30	Standard Hours / Sess	37.5
Working Pattern change date		30/09/2009					Only when changed during the period provided
Working Pattern at change date		Whole Time		Actual Hours		Standard Hours	
More than 1 change in year	<input type="checkbox"/>						Detail of changes
TPP (£.pp)							Notional Whole Time required, if PT
		Submit		Cancel			

5.2 Amendment of pre-populated data on the Employee Detail screen

The Greenbury POL user may amend the pre-populated data. This allows you to tell us of any changes to the member details that have not yet been recorded on the NHS Pensions member database.

Please note that such notifications will be treated as being for the purposes of Greenbury calculation only and do not replace the standard communication methods and Forms used by Employers to inform NHS Pensions of changes in Member data.

5.3 Validation of changes to the pre-populated data entry fields

The following checks will be automatically applied during data submission :

- a) If the pre-populated End Date was before 31 March (i.e. a leaver) then the following fields must not be changed by the POL User :
 - Working Pattern at Start Date
 - Working Pattern Change Date
- This is because any contract changes and the worked part time hours will already be recorded in the NHS Pensions database.
- b) If the pre-populated Surname or Forename is changed then a warning will be displayed requesting that the user completes an SD55G Form to correct the data. However, this will not prevent the Greenbury disclosure request from being submitted.
 - c) For non-practitioner Members, the Working Pattern at Last Update selected must be :
 - Whole Time or
 - Part Time or
 - Maximum Part Time
 - d) Selection of a 'Practitioner' Working Pattern at Last Update is to be used for Practitioners only.
 - e) If the Working Pattern at Last Update is Part Time or Maximum Part Time then
 - Actual Hours / Sessions must be populated with a value between 1 and 40
 - Standard Hours / Sessions must be greater than Actual Hours / Sessions and must be greater than or equal to 10 but less than 42.

5.4 Completion of other Employee Detail data entry fields

The following fields on the Employee Detail screen must be populated by the Form user or a value selected from the relevant drop-down list :

- Marital Status
- TPP (Total Pensionable Pay)

Marital Status – dropdown list contents

The POL user will select the relevant Marital Status from a drop down list containing the following values :

- Single
- Married
- Divorced
- Civil Partnership
- Unknown

For NHS Pension calculation purposes, “Unknown” will be treated as Single status.

The following screen items may be populated dependent on the member’s personal circumstances :

- Divorce Date (but only where the employee is male with service prior to 25/03/1972).

Notification to NHS Pensions of changes in Working Pattern during the financial year

a) *One change in Working Pattern :*

The following screen items should be entered if the Member’s working pattern has changed once during the reporting period and differs from the pre-populated information retrieved from the NHS Pensions member database :

- Change Date
- Working Pattern at Change Date
- Actual Hours
- Standard Hours

It is not permitted to change the working pattern of a Sessional post.

The same validation checks will be applied to the entered fields as are applied to the Working Pattern at Last Update information submitted.

b) *More than one change in Working Pattern :*

The “More Than One Change in Year” tick box should be ticked by the POL user where the member has changed Working Pattern more than once in the year. For example, if the Member has moved from Full Time employment to Part Time employment and then back to Full Time employment again.

If the “More Than Once Change in Year” tick box is ticked then the “Detail of Changes” box must be filled-in with details. NHS Pensions will review the supplied information and contact you for further information as required.

The screenshot below highlights which data entry fields are to be used to key changes in Working Pattern.

The screenshot shows a web form with the following fields and options:

- National Insurance Number: J0 123+56A
- SD Number: 44123+56
- Forename: Doc
- Surname: Holiday
- Start Date (DD/MM/YYYY): 01/04/2009
- End Date (DD/MM/YYYY): 31/03/2010
- Marital status: Please select
- Date of Divorce: Only required for males with service prior to 25.03.1972
- Working Pattern at last update: Part Time | Actual Hours / Sess: 30 | Standard Hours / Sess: 37.5
- Working Pattern change date: 30/05/2009 | Only when changed during the period above
- Working Pattern at change date: Whole Time | Actual Hours: | Standard Hours: |
- More than 1 change in year: | Detail of changes: [dropdown]
- TPP (£, pp): | **Optional Whole Time required, if PT**

Form Fields used to record more than one change in Working Pattern during the Financial Year

Form Fields used to record only one change in Working Pattern during the Financial Year

Once all relevant information has been input, the POL user must click the

- Submit button to submit the case and request calculations
- Cancel button to return to the Employee Grid without making any changes.

6. Existing Disclosure Request screen

If the Greenbury user selects an existing disclosure request from the Employee Grid then they will be taken to the Form shown below.

This screen shows the latest full set of details sent to NHS Pensions and any Pension, Lump Sum and CETV values returned for the Member pertaining to that particular Employer.

The screen also shows any Query History pertaining to the Greenbury disclosure request.

The screen may be used to request a re-calculation of the disclosure figures or to raise a Query whether the information sent in to NHS Pensions is appropriate.

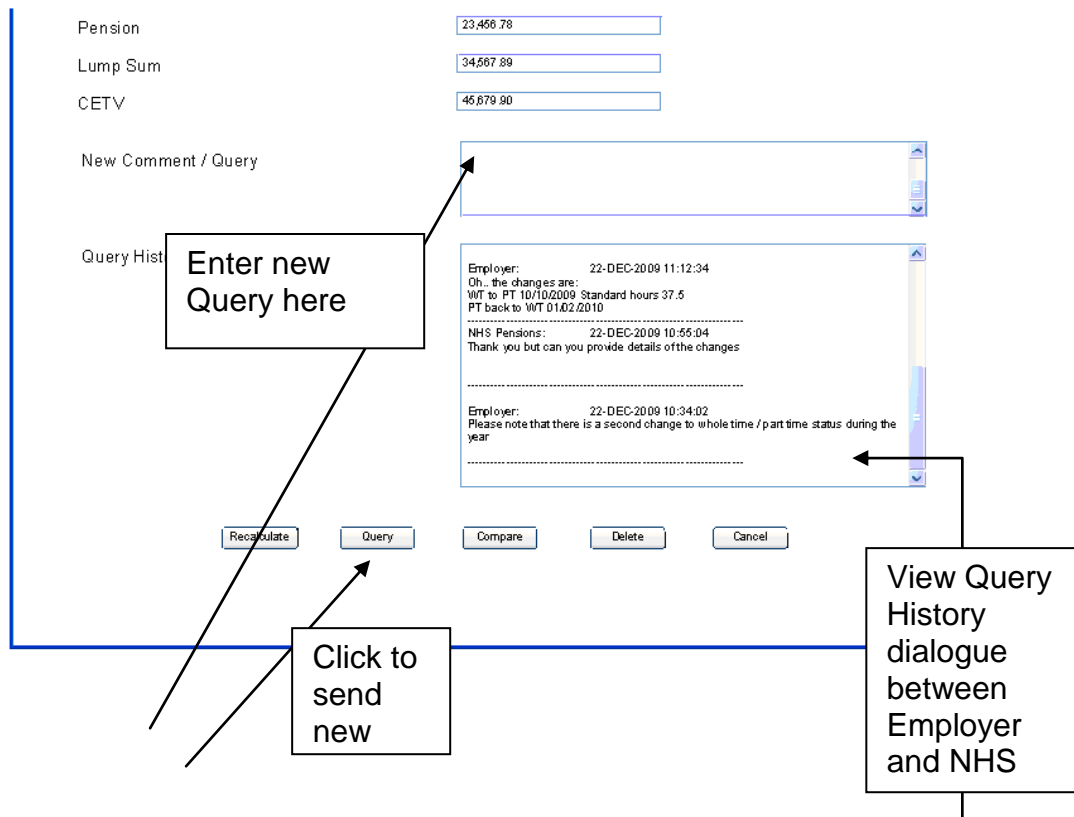
The POL user will be able to compare this year's data with last year's (providing NHS Pensions holds last year's figures).

The POL user can also use this screen to delete a disclosure request where (for example) the wrong member's details have been keyed.

Back		Print		Employer Menu		E-Forms	
National Insurance Number		JD123456A					
SD Number		44123456					
Forename		Doc					
Surname		Holiday					
Start Date (DD/MM/YYYY)		01/04/2009					
End Date (DD/MM/YYYY)		31/03/2010					
Marital status		Please select					
Date of Divorce						Only required for males with service prior to 1972	
Working Pattern at end date		Part Time		Actual Hours / Sess	30	Standard Hours / Sess	37.5
Working Pattern change date		30/09/2009		Only when changed during the period provided			
Working Pattern at change date		Whole Time		Actual Hours		Standard Hours	
More than 1 change in year	<input type="checkbox"/>						
TPP (£.pp)							365 days, whole time equivalent

.... Continued on next page

..... Continued from previous page



6.1 Raise Query

The employer can raise queries with the NHS Pensions Greenbury team by typing the query in the “New Comment/Query” free text box and the pressing the “Query” button.

For each query (and NHSP response) the source of the text (NHS Pensions or Employer), date and time and the text itself will be retained and displayed. This will provide the full dialogue between NHSP and the employer.

Any information entered with respect to a multiple change of working pattern when adding the employee will also be displayed alongside any other queries.

6.2 Recalculate

The employer may wish to request that the calculation for a member is rerun.

This may be because they have entered an incorrect TPP or working pattern.

The POL user should make any amendments or add any additional information and then press the Recalculate button.

The same validation checks will be applied to the submitted data as were applied in the Add Employee Detail screen.

Pension, Lump Sum and CETV figures displayed cannot be amended.

Any ongoing work by NHS Pensions will be notified of this re-calculation request and a new re-calculation started.

The re-calculate button will be greyed out and unavailable initially until the NHS Pensions Greenbury team commence servicing disclosure requests.

6.3 Delete

Clicking the Delete button will remove the employee from the request list. The employee may be recreated via the “Add New Employee” screen but the previous history will not be retained by the NHS Pensions Greenbury application (other than any audit details).

When the employer presses the “Delete” button a confirmation dialog will be displayed:

“Do you really wish to delete this employee request?”
Choosing “Yes” will delete the record.

6.4 Cancel

Allows the POL user to leave the screen without making an update.

6.5 Compare Current Year with Previous Year

The employer can compare the current year’s figures with the previous year’s figures (where available).

This will result in an extension to the bottom of the existing Employee Detail page displaying the comparison details. The comparison information is hidden when the button is clicked again.

The Comparison page shown below is displayed.

Please note that there is currently no automated application of Employer Funding Factor or inflation increase factors. Those factors should be applied manually by each Employer prior to the Greenbury publication. Guidance of factors to be applied is not within the scope of this document and any guidance required on the factors to be used should be sought from the Department of Health.

Previous year comparison data may have been sourced from more than one Employer. In such instances, for the purposes of data protection, all of the previous year's fields will be displayed as blank with the exception of the Pension, Lump Sum and CETV.

The Compare button will initially be greyed out and unavailable until the NHS Pensions Greenbury team commence the return of the disclosed Pension, Lump Sum and CETV values for each Employer.

Back Print Employer Menu E-Forms			
Comparison with previous years figures			
	Previous Year	Current Year	
Start Date	01/04/2008	01/04/2009	
End Date	01/04/2009	01/04/2010	
Marital Status	Single	Married	
Date of Divorce			
Working Pattern at End Date	Part Time	Part Time	
Actual Hours at End Date		30	
Standard Hours at End Date		37.5	
TPP (NWT £.pp)	67,123.45	68,222.33	
Pension (£.pp)	33,111.22	34,222.33	
Lump Sum (£.pp)	99,678.10	101,222.44	
CETV (£.pp)	325,100.02	340,200.03	