

NHS Pensions Scheme – New Employee Joiner Questionnaire

This questionnaire captures details from new employees regarding their current status within the NHS Pension Scheme. This must be completed as fully as possible as part of the induction process. Please ensure that you have read the NHS Pensions Members Guide before completion.

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

Name

National Insurance Number

Q 1	Do you wish to be a member of the NHS Pension Scheme in your new post? (If you are an NHS worker you will be automatically included unless you opt out, if you are employed under a direction you must opt in using form SD65). If "no" then please ask for form SD502 from your employer.	Yes <input type="checkbox"/> No <input type="checkbox"/>
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Q 2	Are you currently or were you previously a member of the NHS Pension Scheme? If your answer is "yes" add full details of where and when below.	Yes <input type="checkbox"/> Go to Q3	No <input type="checkbox"/> Go to Q4

Q3	Do you have any other current NHS Posts (alongside this one)? If your answer is "yes" please state full details below and answer the next question:	Yes <input type="checkbox"/> No <input type="checkbox"/>

If yes, are these posts part-time? If your answer is "yes" please state full details including your contracted hours:	Yes <input type="checkbox"/> No <input type="checkbox"/>

Q 4	<p>Do you have any existing pension rights that you would be interested in transferring into the NHS Pension Scheme to buy additional membership? If your answer is “yes” ask your employer for a Transfer of Benefits Booklet. Please note that any transfer must be done within 12 months of joining the Pension Scheme.</p>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Q 5	<p>Have you previously / or are you currently making a claim from the NHS Injury Benefits Scheme? If your answer is “yes” add full details below as necessary. Please include details such as amount, when payment started, where you were working etc.</p>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Q6	<p>For your dependents to automatically receive pension benefits in the event of your death you must be in a legally recognised relationship or you must nominate your non-legal partner. Do you need to nominate your non-legal partner? If your answer is “yes” please obtain and complete the nomination forms on the NHS Pensions website and return them to NHS Pensions.</p>	Yes <input type="checkbox"/> No <input type="checkbox"/>

Only complete the questions below if a “Yes” was provided to Q2.

Q7	<p>If you were a member of the NHS Pensions Scheme before 1st April 2008 you will have 1995 Section Membership - Have you been offered a Choice to move to the 2008 Section of the NHS Pension Scheme? If your answer is “yes” add full details below as necessary and outline your decision.</p>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Q 8	<p>Do you currently receive an NHS Pension?</p>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Q 9	<p>Have you previously / currently claimed an NHS Pension on the grounds of ill health or incapacity? If your answer is “yes” please state the age you were on your return to NHS Employment.</p>	Yes <input type="checkbox"/> No <input type="checkbox"/>

Q 10	<p>Have you previously taken redundancy from an NHS organisation? If your answer is “yes” add full details below as necessary. Please include details such as the name of the organisation, the amount paid, when it was paid, and any other details of the arrangement including whether the lump sum was paid by the employer.</p>	Yes <input type="checkbox"/> No <input type="checkbox"/>

Q 11	<p>Do or did you have any Additional Voluntary Contribution* arrangements in place through the NHS Pension Scheme If your answer is “yes” add full details below as necessary:</p>	Yes <input type="checkbox"/> Go to Q12	No <input type="checkbox"/> Go to Q14

Q12	<p>Have you an Additional Pension purchase in place? If your answer is “yes” add full details below as necessary:</p>	Yes <input type="checkbox"/> No <input type="checkbox"/>

Q13	<p>Do you have an added years contract in place? If your answer is “yes” add full details below as necessary:</p>	Yes <input type="checkbox"/> No <input type="checkbox"/>

Q 14	<p>In your new post will you receive or be applying for Mental Health Officer* Status? If your answer is “yes” add full details below as necessary:</p>	Yes <input type="checkbox"/> No <input type="checkbox"/>

Please give full details below of any previous posts held with Mental Officer Status	

Q15	Have you ever had a refund of your NHS Pension Contributions? If your answer is "yes" please give full details below:	Yes <input type="checkbox"/> No <input type="checkbox"/>

Q16	Have you ever transferred your Pension Rights into or out of the NHS Pension Scheme? If your answer is "yes" please give full details below:	Yes <input type="checkbox"/> No <input type="checkbox"/>

Q17	Did you have special class status* in your previous employment?	Yes <input type="checkbox"/> No <input type="checkbox"/>
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Explanatory Notes

Additional Voluntary Contributions

This is where the member has chosen to take out a separate account from a selection of providers selected by NHS Pension Scheme managers and pays either a lump sum or regular amounts to build up a separate fund for retirement.

Special Class Status / Mental Health Officer

Nurses, Midwives, health visitors, physiotherapists and mental health officers in post before 6 March 1995 have the right to retire from a normal retirement age of 55 without a reduction to their pension, subject to certain criteria being fulfilled. These are outlined on the NHS Pensions website – www.nhsbsa.nhs.uk/pensions.

(Note - Nurses would not normally have to apply for MHO status in a new post but Physiotherapists & Occupational Therapists would have to if this new post was within 5 years of their previous MHO post).