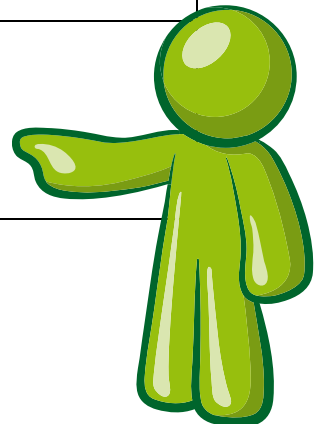


# NHS Pensions Choice Roadshows FAQs

## Delivery/Distribution

Question	Answer
If someone has two employments who will receive the Choice statement?	The Choice Pack which includes the Choice Statement will be sent to the employer where the member has the most recent contract.
When will the Choice statements be issued for people under 50?	This has now been revised and further information can be found in Choice Newsletter Number 6.
How much notice will we be given before the statements are delivered?	The larger employers will have prior notification and we envisage that Choice Contact Leads will be notified of the high level timelines.
Can you confirm when GP Practices will receive the Choice packs and confirm it will be for ALL ages and will they receive their packs directly from NHS Pensions?	Yes, all GP Practices will receive statements for staff of all ages from NHS Pensions. However, Practitioners will receive their statements as part of a separate distribution.
When does the regional exercise need to be completed by?	The whole Choice Exercise must be completed by the end of march 2012.
Do you think the statements will be ready for January pay day of the 25 <sup>th</sup> ?	We will work with employers to let them know when Choice statements will be delivered as best we can. It may not be possible to specify a precise day on which deliveries will be made.
What happens if the designated choice person is unavailable to take delivery? Who then signs for the packs?	A form has now been issued to all employers asking them to nominate a Choice lead from an operations level and a management level. As you will have notification prior to receipt of the statements a deputy can then be appointed if the designated Choice lead is not available.



Question	Answer
Will principals in a GP Practice have their Choice Statements issued by the Health Authority?	Following a request from the British Medical Association it is currently anticipated that the statements for GPs will start to be issued from September 2010 in SHA order regardless of age and they will be delivered to the Employing Authority that is shown as an open employment for the member. In the main this is likely to be the Primary Care Trust or Local Health Board.
Will Trusts who outsource their payroll need to provide a Choice lead from the payroll provider in addition to the Trust Choice lead?	Employers should provide a Choice Lead and a deputy for their organisation. These can be from within the Trust or from the Payroll Provider. This decision must be made by the Trust as to who you would like to have NHS Pensions contact.
How are the statements being issued from Pensions?	In the majority of cases they will be distributed by Courier? For the very small distributions these are likely to be made by Royal Mail.
Can an employer send on statements to employees who have left their employment or do we have to send them back to NHS Pensions?	We would prefer that employers return the statements to NHS Pensions confirming the date the person left and their forwarding address if known and an indication as to whether the person has moved to another NHS employer (if known).
When will be notified when we are going to receive our statements?	Where possible we will provide notice of when statements will be issued as far in advance as possible and again where possible an approximate delivery date.
Can we have a factsheet on redundancy?	There is now a Choice factsheet covering Redundancy on the Choice section of the website.
What will happen if a member has outstanding reconciliation queries when the Choice statement is produced for our region?	The member will not get a statement until the reconciliation queries have been resolved. They will then have 4 months to make their choice.
Will Choice statements be produced in EA code order or will they be produced piecemeal?	The order in which Choice Statements will be issued in each SHA region will depend upon the Choice readiness of each employer.
How will Direction Bodies receive the Choice packs for their employees who are members of the NHS Pension Scheme?	The intention is that Direction Bodies will receive their statements in alphabetical order.

Question	Answer
TUPE – wef 1 July 2009. Can I arrange for the statements to come to me as their current employer and not the previous employer?	Choice Statements would normally be sent either direct to the member or NHS Employer depending upon the notice we have been given. Further guidance about members caught up in TUPE Transfers during Choice can be found in the Choice Newsletters for Employers
Will the implementation process be any different for Direction Bodies?	No.
If the payroll is delivered through SLA for PCT will all statements go to the payroll provider despite having a Pensions Choice Lead in PCT.	No, Choice Statements will be sent to whoever the employer nominates to receive them.
In respect of bank staff will they only be issued packs if they have worked 3 months prior to the Choice exercise?	It is important for employers to ensure that membership records for bank staff employments are closed down promptly where individuals do not work within a three month period. Where employments are open Choice Statements will be issued.
GPs – Is the plan to send out the statements to practitioners in two tranches ie over 50s and under 50s?	It is currently anticipated that the Statements for GP's will start to be issued from September 2010 and will be issued in SHA order regardless of age.
What information will appear on the statement list?	The Choice Statements will provide a comparison of the pension benefits a person might expect to receive from the 1995 and 2008 Section. In the main these will show the benefits payable at age 60 and 65. However where someone has already reached age 60 or 65, a similar comparison will be provided at the person's current age and next significant birthday of 65 or 70. The statement will also show the maximum amount of lump sum that can be taken. Partner pensions will also be shown.
What happens to the statements for staff who are in the middle of transferring from one organisation to another?	Such Statements should be returned with a covering note explaining where the individual has moved to.
Can a Choice Lead be a Trade Union Representative or does the Lead have to be a member of management?	This will be a decision for the NHS employer however we would expect that the Choice Lead would be someone with some knowledge of the NHS Pension Scheme.

Question	Answer
Who will ensure Managers have a good understanding of the Choice Exercise?	NHS Pensions has issued information packs to all Employers and Trades Unions to ensure that all managers have access to the same information. In addition, NHS Pensions has and will continue to issue managers with information using Choice Newsletters which should be distributed to all relevant personnel.
How do you know how quickly employers will be distributing Choice Statements to ensure members have three months in which to make their decision?	Guidance has been issued to all employers about the need to ensure Choice Statements are issued promptly, ensuring members are provided with at least three months in which to make their decision. We will also work with employers where possible in instances where distributing statements might present problems.
Will the Choice materials including the Statement be available in large print?	As we receive requests they will be processed on a case by case basis. In the 1st instance a query should be raised through the Choice Helpline for Employers.
Members who were eligible for Choice but left before receiving a Choice statement and return within 5 years of leaving, where will their Choice Statements be sent to?	Such members will be picked up by NHS Pensions on their return and Choice packs will be sent to the new employer.
If a Choice Statement is wrong and it is necessary to produce another one for the member, where will the Statement be sent to and will the member get another 3 months in which to make their decision?	Yes, these statements will be sent to the member at their home address and they will be given a full three months in which to make their decision.
Where employers obtain signatures confirming safe receipt, if the member then transfers to another employer or is involved in a TUPE or TUPE like Transfer who should retain the signature?	The employer who obtained the signature in the first instance should retain it on their records.
Who should return undelivered Choice Packs?	Employers should return any packs they are unable to deliver with a covering note explaining why.
Who should return the completed Choice Option forms?	Members should return the completed option forms in the return envelopes provided in their Choice Pack.
Can a duplicate Statement be issued if the original one is lost?	Yes

Question	Answer
How will Employers know how many Packs to expect and whether they have received them all?	For the larger employers we will aim to contact you at least two weeks before the expected delivery date to let you know when and how many packs to expect. There will also be a list with your delivery to show you which statements make up the delivery.
When will Employers receive any remaining Packs after the initial delivery?	This may depend upon the complexity of individual cases but we expect any remaining Packs will be delivered within a two to three month period following the main delivery.
As a Direction Employer how will we identify 'common' surnames on the Choice Packs?	The address will show the member's first name followed by their second initial and will also show their individual Scheme reference number.
Are copies of the Choice Statement available should the original get damaged?	Yes copies will be available.
At what date will the Choice Statement address be taken i.e. will this be as at the last year end update.	It will be taken from the information provided to NHS Pension by the employer. The date will clearly depend on when this information was provided or updated.
Can packs be put in alphabetical order even if they are on Electronic Staff Records (ESR)?	This would present problems. The aim is for those employers who use ESR we intend to deliver the pack in the same order in which they receive ESR payslips.
What should an employer do if they do not receive a Choice Pack for and they know that they are not employed elsewhere?	We are asking employers not to try and second guess who should be expecting a Choice Pack. In such circumstances it is possible that there may be a particular problem in producing a Choice Statement for that particular member and their Pack will arrive as part of a later delivery or that person may have had previous Practitioner membership and is therefore part of a separate tranche.
Will the Choice Packs be delivered to the Trust or will they go to the Payroll Provider?	This will depend on who you have nominated as your Choice contact?
Where will Choice Packs be delivered to for seconded staff?	Choice Packs will be delivered to the employer we have recorded on our membership records for such members. Therefore unless we have been informed of any change they will be delivered to the employer where there is an open employment.
Where do members return their Choice option forms to?	Members should use the reply envelope provided in their pack.

Question	Answer
Will direction bodies receive a copy of the letter that goes to members after making their decision?	We will only send employers a copy of the letter that goes to the member where they have returned their option for and indicated that they wish to move to the 2008 Section.