NHS Pensions Online (POL) Guide

13. SM8

When a member works part time in either an hourly or sessional contract and the annual update or termination details show actual part time hours or sessions worked that are in excess of whole time for the period, The National Health Service Business Services Authority (NHSBSA) reduces the annual hours/sessions figure to the maximum hours/sessions that can be worked for the period and an automated form SM8 is sent to you advising of this figure and requesting that you either:

- Agree the figure and amend your records
  Or
- Advise of the correct figure to be shown, which must be below the figure notified to you by The NHSBSA.

Once the SM8 link is selected you will see a list of your members for whom The NHSBSA have issued an SM8:

<table>
<tr><td colspan="12">Back   Print   Employer Menu   E-Forms</td></tr>
<tr><td colspan="12">SM8 REQUESTS
You are currently logged in as an Employer for EA 5812.</td></tr>
<tr>
<th>∧ NI Number ∨</th>
<th>∧ SD Number ∨</th>
<th>∧ Surname ∨</th>
<th>∧ Forename ∨</th>
<th>∧ Date Of Birth ∨</th>
<th>∧ Emp Ref ∨</th>
<th>∧ Emp ID ∨</th>
<th>∧ Period Start ∨</th>
<th>∧ Period End ∨</th>
<th>Hours / Sessions</th>
<th>Amended Hours / Sessions</th>
</tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td>2</td><td>01-Dec-2008</td><td>31-Mar-2009</td><td>1399</td><td>648</td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td>2</td><td>01-Apr-2008</td><td>30-Apr-2008</td><td>225</td><td>154</td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td>1</td><td>30-Jun-2003</td><td>23-Nov-2003</td><td>811</td><td>787</td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td>3</td><td>12-May-2008</td><td>08-Jun-2008</td><td>2001</td><td>150</td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td>1</td><td>01-Apr-2007</td><td>30-Nov-2007</td><td>1929</td><td>1289</td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td>1</td><td>09-Feb-2009</td><td>31-Mar-2009</td><td>321</td><td>273</td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td>12</td><td>01-Apr-1999</td><td>29-Aug-1999</td><td>429</td><td>237</td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td>1</td><td>01-Apr-2007</td><td>30-Nov-2007</td><td>1929</td><td>1289</td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td>1</td><td>09-Mar-2009</td><td>31-Mar-2009</td><td>249</td><td>123</td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td>1</td><td>01-Nov-2006</td><td>31-Mar-2007</td><td>1955</td><td>808</td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td>2</td><td>01-Oct-2006</td><td>31-Mar-2007</td><td>1819</td><td>975</td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td>8</td><td>04-Jun-2007</td><td>10-Jun-2007</td><td>435</td><td>37</td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td>1</td><td>01-Apr-2008</td><td>26-Oct-2008</td><td>1374</td><td>1119</td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td>1</td><td>01-Apr-2008</td><td>31-Mar-2009</td><td>1974</td><td>1955</td></tr>
</table>

This page can be sorted into different orders by clicking on the column header etc.

To select a specific SM8 click on the National Insurance Number (NiNo) for that member.

<table>
<tr><td>Exit Online Services</td><td></td></tr>
<tr><td>Site Update</td><td>NI Number:</td></tr>
<tr><td></td><td>SD Number:</td></tr>
<tr><td></td><td>Surname:</td></tr>
<tr><td></td><td>Forename(s):</td></tr>
<tr><td></td><td>EA Reference:</td></tr>
<tr><td></td><td>Employment ID: 2</td></tr>
<tr><td></td><td>Employment Start Date: 14/09/2004</td></tr>
<tr><td></td><td>Period Start: 01/12/2008</td></tr>
<tr><td></td><td>Period End: 31/03/2009</td></tr>
<tr><td></td><td>Original Hours/Sessions: 1399</td></tr>
<tr><td></td><td>Updated Hours/Sessions: 648</td></tr>
<tr><td></td><td>Date Actioned: 28/09/2009</td></tr>
<tr><td></td><td>Accept   Amend</td></tr>
</table>

The above SM8 is advising that the annual update for year ending 2009 advised that the member worked a total of 1399 hours for the period 01/12/2008 to 31/03/2009 (121 days). The member's standard hours for this employment are 37.5; therefore the maximum number of hours that can be worked during this period is 648 hours, calculated as follows:

$$121/7 \times 37.5 = 648 \text{ hours}$$

If the member has worked any hours that were paid at overtime rate then these are not pensionable and you should amend the hours, if relevant, and reduce both the employees and employers contributions and pay figures to exclude contributions/pay taken on these non-pensionable hours.

If you are happy with the amended figure notified on the SM8 by The NHSBSA then you should select the "Accept" link. You may also need to submit a form SD55E to amend the contributions and pay figures.

If you disagree with the hours calculated by The NHSBSA select the "Amend" link on the SM8 and this will take you to form SD55E where you can amend the hours/sessions, contributions and pay details as relevant.

Because The NHSBSA have already amended their records to show the maximum hours/sessions that can be worked during the period this is the existing p/t hours figure that will be displayed on the SD55E:

px Number as shown on SD55	Current Data	Year	Revised Amount
.Employee Conts (no AVC's) - Enter Revised Amount of basic employee conts	1907.82	31/03/2009	
. Employee Pensionable Pay - Enter Revised Amount	29351.07	31/03/2009	
. Contribution Rate -	6.5	31/03/2009	
. Employer Conts - Enter Revised Amount of employer conts	4109.15	31/03/2009	
. Employer Pensionable Pay - Enter Revised Amount	29351.07	31/03/2009	
. Employees Gross Pay - Enter Revised Amount	29558.24	31/03/2009	
. Employees Annual Rate of Pensionable Pay - Enter Revised Amount	0.03	31/03/2009	
. AVC's Paid (no money purchase) - Enter Revised Amount	0.00	31/03/2009	
. Non-Pensionable days - Enter Revised number		31/03/2009	
. Part Time Staff - Enter Revised Amount of pensionable hours or paid sessions	648	31/03/2009	

If the original figure that was notified on the annual update was an error and showed for example 1246 hours when it should have been 246 hours; and the automated action taken by The NHSBSA has reduced the yearly hours to the maximum for the period i.e. 648 then you can change this by inserting the correct hours in the right hand column and then submit by selecting the "Amend" link.

You will then receive a confirmation message that the SM8 has been removed from the list:
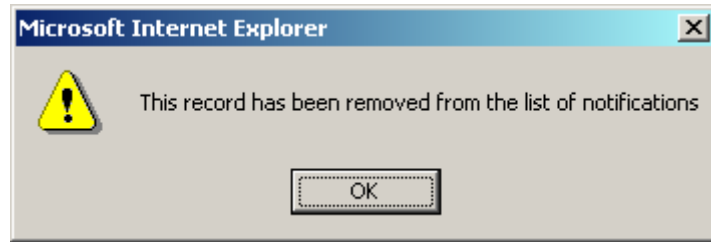
When you have actioned all your automated E-Forms or you want to go straight to the main E-Forms menu select either E-Forms on the blue banner or "Continue to E-Forms".
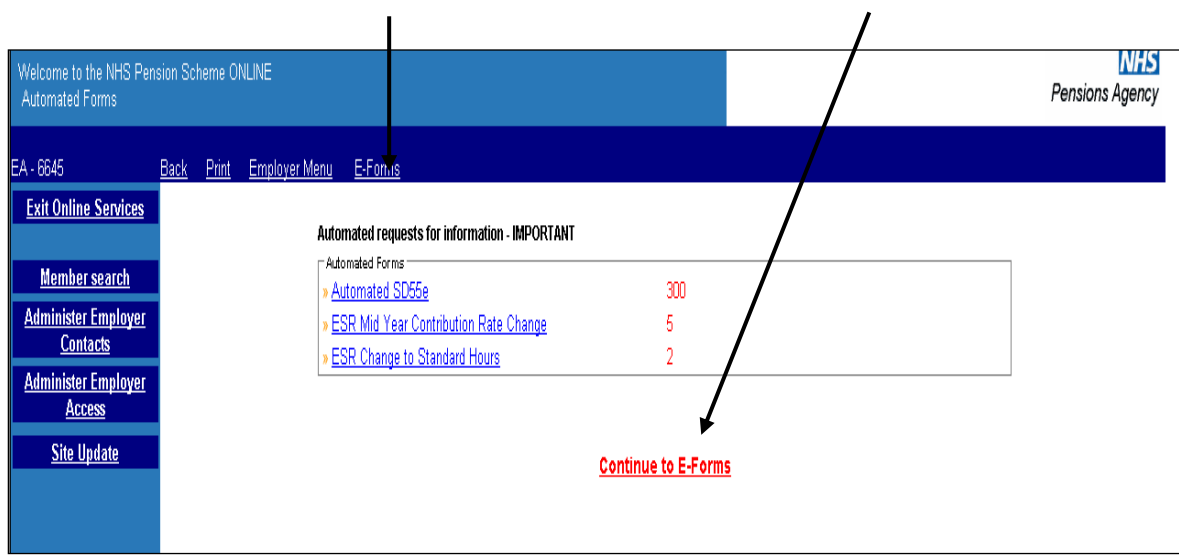
You will then see the full E-Forms menu: