NHS Pensions Online (POL) Guide

19. SD55 – Terminating a period of employment

After selecting the link to the form you will be asked to insert the NHS Pensions reference number (SD) or National Insurance (NI) number, the date of termination and the reason for leaving:

Welcome to the NHS Pensions Online

SD55 Termination of Employment

EA-   Back   Print   Employer Menu   E-Forms

Exit Online Services
Member Search
Site Update

You are currently logged-in as an Employer for **EA**

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

NI Number

SD Membership Number
(e.g. 12345678)

Please enter date of termination (e.g. 30/11/2000)

Reason for completion code   01 - Voluntary resignation or retirement

Submit

Reason for leaving codes:

01	-	Voluntary resignation or retirement
02	-	Employee dismissed – Benefits being withheld
03	-	Redundancy
04	-	Sickness
11	-	Employee ceased to be pensionable because of upper age limit or, maximum 45 years qualifying service has been achieved.
13	-	Assistant practitioner becomes a principal practitioner
14	-	Member has died in service. If the member died after they left your employment but you had not yet sent in their termination form you should not use exit code 14, this is death in service **only**. You should inform NHSBSA separately of the members' death.
16	-	Employment continues but member opted-out by signing form SD502.

Once this page has been completed you will be taken to form SD55 where details of the pay, contribution, part time (PT) hours/sessions are completed

Once you have submitted a valid NI or SD number you will be taken to a list of open employments with your Authority/GP practice and you should select the employment you wish to update by clicking the blue text:

Please click on the Employer name of the employment you wish to update.

ID	EA Code	Employer	Start Date	Status	Years to Update
1	1111	Another employer	06/02/2019	Whole Time	2

If, after selecting an open employment for update, you are requested to enter information for year(s) for which you have previously submitted information, this would indicate that the information has not processed successfully and needs to be corrected before you can submit any further updates. In this circumstance you should contact the Agency's Pensions Contact giving full details and requesting that this missing year(s) update(s) be investigated.

The numbers of years that require updating to bring the record up to date are displayed in the grid, but you can only update one year at a time starting with the first year that is outstanding.

By selecting the employer name you are taken to the 'SD55 terminating a period employment' form. The form will take only one year of pay and contribution details. If the member's employment needs more than one year's updates between the last cyclic update submitted and the date of termination, then you will receive an onscreen message asking you to submit any missing cyclic updates before completing the termination form.

Help text:

Alongside each field is a link to help text giving information on whether the information is mandatory and how to complete it. Selecting the question marks will access this help text:

Details regarding the additional information required are explained in the next paragraphs.

The help text available for 'Employee's pensionable pay' is as follows:

Employee contributions (no AVCs) - mandatory field

Enter the total of the Member's gross contributions in respect of actual pensionable pay for the financial year up to and including 31 March (or date of leaving if member is terminating Scheme membership). If actual pay is reduced by sick/maternity leave the contributions will also be reduced. Exclude any AVCs or Additional Pension contributions. The figure entered is validated against the employees pay and the contribution rate notified, which must be a valid contribution rate for that financial year. If the contributions are either too low or too high you will receive an on-screen message (once you submit the form) prompting you to check your entries and advising what the contributions figure should be. If the amount you are entering is correct, either because the member has disallowed days due to unpaid sickness; has a period of maternity leave or; arrears apply then click the check box. You will then be asked to confirm the information you are entering is correct, for audit purposes.

If you select 'Back to Contents' you will be taken to the list of contents for the complete help text document:

Completion of pay and contribution fields

The fields that need completing depend upon the member's employment type, however on all cases the employees and employers pay and contributions must be completed together with the contribution rate for years from 01/04/2008 onwards.

Where mandatory fields are not completed, or fields are completed that are not required for that member's employment type, you will receive on screen error messages advising you of the action to take.

Name		
NI Number		
SD Number		
Your Payroll Reference Number	❓	[ ]
EA Code		
Employment ID		1
Capacity Code		03
WT / PT Status		Whole Time
Employment Type		2
Date of commencement		06-February-2019
Contributions year		**2020**
Employee's contributions (no AVCs)	❓	£ 5100 . 00 p
Employee's pensionable pay (no deemed) is a mandatory field for the year 2020.	❓	£ [ ] . [ ] p
Contribution rate is a mandatory field for the year 2020.	❓	Select... ▾
Employer's contributions	❓	£ 11900 . 00 p
Employer's pensionable pay (include any deemed) is a mandatory field for the year 2020.	❓	£ [ ] . [ ] p
Employee's gross pay (include any non pensionable) is a mandatory field for the year 2020.	❓	£ [ ] . [ ] p
Employee's AVCs (no money purchase). Our records do not show an ongoing AVC contract for the year 2020. If there is a contract please submit this form without an entry in this field and contact your Client Centre.	❓	£ 500 . 00 p
ERRBO contributions	❓	£ [ ] . [ ] p
Number of non-pensionable days	❓	[ ]
Total number of pensionable hours or paid sessions worked (part time staff only) Not Whole Time workers or Practitioners for the year 2020. Please delete your entry.	❓	250

Contribution rate:

Prior to 01/04/2008 the employee paid contributions at the rate of either 5% (manual workers) or 6% (all others). With effect from 01/04/2008 this changed and a member's contribution rate is based on their salary rate (this is known as 'tiered contributions').

Completion of this field is therefore mandatory for financial years 2009 and later. The pensionable pay shown in this field should be the pensionable pay in force at the end of the financial year (or leaving date for year in which membership is terminated).

The correct rate of contributions to be applied is the responsibility of employers and not NHSBSA.

For up to date details of the relevant contribution rates with effect from 01/04/2008 please see our website at www.nhsbsa.nhs.uk or view the current tax years contribution rate table by going into the GP1 Payment form (for GP practices) or RFT1 Payment Form (for all other employers).

On screen error messages:

Each field for completion has specific validation and if you complete the form incorrectly or omit to complete mandatory information, you will receive on screen error messages advising you of the areas that need looking at, as follows:

Contributions year		2021
**Employee's contributions (no AVCs) is a mandatory field for the year 2021.	❓	£ [ ] . [ ] p
**Employee's pensionable pay (no deemed) is a mandatory field for the year 2021.	❓	£ [ ] . [ ] p
**Contribution rate is a mandatory field for the year 2021.	❓	Select... ▼
**Employer's contributions is a mandatory field for the year 2021.	❓	£ [ ] . [ ] p
**Employer's pensionable pay (include any deemed) is a mandatory field for the year 2021.	❓	£ [ ] . [ ] p
**Employee's gross pay (include any non pensionable) is a mandatory field for the year 2021.	❓	£ [ ] . [ ] p
Employee's AVCs (no money purchase)	❓	£ [ ] . [ ] p
ERRBO contributions	❓	£ [ ] . [ ] p
Number of non-pensionable days	❓	[ ]
**Total number of pensionable hours or paid sessions worked (part time staff only) is a mandatory field for the year 2021.	❓	[ ]

Additional Pension 1

Identifier:	❓	[ ]
Contributions:	❓	£ [ ] . [ ] p
Instalments:	❓	[ ]

Additional Pension 2

Identifier:	❓	[ ]
Contributions:	❓	£ [ ] . [ ] p
Instalments:	❓	[ ]

Additional Pension 3

Identifier:	❓	[ ]
Contributions:	❓	£ [ ] . [ ] p
Instalments:	❓	[ ]

On some fields where an error message is received you have the option to override the error. For example, where an employee's pay figure of £4000.00 has been entered with employee's contributions paid of only £90.00 and employer's contributions of only £140.00.;

The validation on this form calculates what the expected amounts are by using the respective pay figures together with the contribution rate and will allow £10.00 either side of this expected amount. The acceptable range will then be displayed within the error message.

If the figures you have entered are not within the range but are correct you have the option to override the validation by ticking the checkboxes alongside the relevant fields. You will however receive a further confirmation screen advising that if you override these validations you are confirming the information as being correct and will be asked to provide a reason why:

Name
NI Number
SD Number
Your Payroll Reference Number
EA Code
Employment ID
Capacity Code
WT / PT Status
Employment Type
Date of commencement
Contributions year
** Employee's contributions (no AVCs) should be between £545.54 and £565.56 (5.00%) for the year 2021. If you are happy with this value, please tick the checkbox.

Employee's pensionable pay (no deemed)

Contribution rate (at year end)

**Employer's contributions must be 14.38% of Employer Pensionable Pay. A value is expected between £1,587.75 and £1,607.77 for the year 2021. Please tick the checkbox if you are happy with this value.

Employer's pensionable pay (include any deemed)

Employee's gross pay (include any non pensionable)

Employee's AVCs (no money purchase)

ERRBO contributions

Number of non-pensionable days

Override Reason

By overriding the validation you are confirming that the values you have inserted are correct and benefits may be calculated on them. If these values are incorrect please amend as appropriate and untick the checkbox before you submit the form.

Please provide the reason that these values are correct:

Submit   Cancel

Before selecting the override check box you should always check your entries in case you have made an error.

The employees pay figure should generally be within the range shown but could be a lower or higher figure if for some reason contributions were underpaid (due to maternity leave when they are generally collected on return to work) or, an existing amount of outstanding contributions has been collected, either from a previous year or a previous employment.

Only if there is a valid reason for the actual amounts collected being outside the range should the override checkbox be selected and the reason entered.

Annual part time (PT) hours check

If the employment is PT a check is also done to determine if the annual hours or sessions entered exceed whole time for the period.

If they do, an error message will appear showing the maximum amount of hours or sessions that can be pensionable for the period:

Number of non-pensionable days

**Total number of pensionable hours or paid sessions worked (part time staff only) must not exceed 1955 for the year 2021.

9999

The figure calculated is based on the standard hours or sessions notified to us on the joiner form (or any later change) and the number of weeks in the period of the update year.

For instance, if the termination is for a full year and the standard hours are 37.5 then the maximum hours that can be pensionable is 1955 (37.5 x 52.143 weeks).

If the actual hours worked are in excess of this figure then the member cannot be pensionable on any hours in excess of 1955 and any over deducted contributions should be refunded locally. The pay and contribution details should be amended before you submit the SD55.

Additional voluntary contributions (AVC) and additional pension (AP) contracts

Also recorded on this form are details of AVC contributions and AP contributions.

These fields should only be completed if the member has an ongoing contract at any time within the update year.

If there is no such contract, the fields should be left blank otherwise validation error messages will be produced.

Likewise if there is an ongoing contract and you do not complete the relevant fields an error message will be produced, as follows:

Additional Pension 1

**Additional Pension Contract not recognised for the year 2021, if you believe this is incorrect then please contact NHS Pensions   [1]

**No contributions allowed for the year 2021.   £ [100] . [00] p

**No instalments allowed for the year 2021.   [12]

If you have details of an ongoing contract, either for AVCs or AP contributions, and you complete the relevant fields but you get an error message advising there is no contract you should leave the fields blank in order to submit the annual information and then contact the NHSBSA for further advice.

Generally in these circumstances there has been a delay before NHSBSA has been able to update the details of the contract to the member record. Or the member may have contacted NHSBSA requesting the contract ceases. This will be confirmed when you contact NHSBSA.

Early retirement reduction buy out (ERRBO) only available to 2015 Scheme members

The ERRBO field is shown below which needs to be completed if the member has an going ERRBO contract, the fields shows the total amount paid in the year

Name

NI Number

SD Number

Your Payroll Reference Number

EA Code

Employment ID

Capacity Code

WT / PT Status

Employment Type

Date of commencement

Contributions year

Employee's contributions (no AVCs)	?	£	500	00	p
Employee's pensionable pay (no deemed)	?	£	10000	00	p
Contribution rate (at year end)	?	5.0 ∨			
Employer's contributions	?	£	1430	00	p
Employer's pensionable pay (include any deemed)	?	£	10000	00	p
Employee's gross pay (include any non pensionable)	?	£	10000	00	p
Employee's AVCs (no money purchase)	?	£			p
ERRBO contributions	?	£			p
Number of non-pensionable days	?				
Total number of pensionable hours or paid sessions worked (part time staff only)	?		300		

Additional Pension 1

Identifier:	?				
Contributions:	?	£			p
Instalments:	?				

Additional Pension 2

Identifier:	?				
Contributions:	?	£			p
Instalments:	?				

If you enter a value in the field and the member is not a member of the 2015 Scheme you will receive the following error message

**Entries missing or possible problems with data entered - please scroll down the page to check comments in red and amend where necessary.

Name

NI Number

SD Number

Your Payroll Reference Number	?		

EA Code

Employment ID   5

Capacity Code   04

WT / PT Status   Whole Time

Employment Type   1

Date of commencement   06-July-2020

Contributions year   **2021**

Employee's contributions (no AVCs)	?	£	5	00	p
Employee's pensionable pay (no deemed)	?	£	100	00	p
Contribution rate (at year end)	?	5.0 ∨			
Employer's contributions	?	£	14	38	p
Employer's pensionable pay (include any deemed)	?	£	100	00	p
Employee's gross pay (include any non pensionable)	?	£	100	00	p
Employee's AVCs (no money purchase)	?	£			p
**ERRBO Contributions may only be entered for 2015 Scheme service	?	£	200	00	p
Number of non-pensionable days	?				
Total number of pensionable hours	?				

If you enter a value in the field and the member does not currently hold an ERRBO contract no error message is given on the system, but when processed the information error code

0487 – ERRBO contributions present but not expected, this error will appear in NHS Pensions allocated errors.

If there is a ERRBO contract in place and you omit to include the amount no error message is given on the system, but the record will update without the information.

Mid-year changes to contribution rates:

All users

The contribution rate you enter in the year end details on form SD55 should be the contribution rate in force at the end of the financial year on 31 March.

The earliest annual update that could show a mid-year contribution rate change would be the annual update for year ending 31/03/2010.

If you need to make more than three mid year changes to the contribution rate you can add rows as required.

	Period From			Period To			Contribution Rate	Employee Contributions		Employee Pay		Delete
1	Day ∨	Month ∨	Year ∨	Day ∨	Month ∨	Year ∨	Select... ∨	£	.	£	.	☐
2	Day ∨	Month ∨	Year ∨	Day ∨	Month ∨	Year ∨	Select... ∨	£	.	£	.	☐
3	Day ∨	Month ∨	Year ∨	Day ∨	Month ∨	Year ∨	Select... ∨	£	.	£	.	☐

Mid Year Contribution Rate Changes

Add Row

There is validation within this area to ensure that the information you enter matches the contributions, pay and contribution rate that you have entered for the year end details.

For example, if you enter the year end contribution rate for 2019/2020 as 5.6%, in the main part of the form, and also enter a change to the mid year contribution rate to 7.1% wef 10/06/2020 to 31/03/2021 you will receive an on screen error message because the year end contribution rate for 2019/2020 should not be 5.6%but should show the latest contribution rate which is 7.1%

If the contributions and pay details entered do not match the rate of contributions shown you will again receive an on screen error message.

ESR users

If you use the Electronic Staff Records (ESR) payroll system any changes made prior to your update by the ESR interface will be visible and will be displayed on the SD55, as follows:

Mid Year Contribution Rate Changes

	Period From			Period To			Contribution Rate	Employee Contributions		Employee Pay		Delete
1	01 ∨	April ∨	2020 ∨	09 ∨	June ∨	2020 ∨	5.6 ∨	£	.	£	.	☐
2	10 ∨	June ∨	2020 ∨	31 ∨	March ∨	2021 ∨	7.1 ∨	£	.	£	.	☐
3	Day ∨	Month ∨	Year ∨	Day ∨	Month ∨	Year ∨	Select... ∨	£	.	£	.	☐

Add Row

When the ESR Interface submits these details, an automated e-form is created by NHSBSA called **ESR mid year contributions rate change** which is sent to the list of **automated requests** in Pensions Online (POL).

If you have not yet responded to this automated request then the change dates and contribution rates only will be displayed. You are required to enter details of the employees' contributions and pay for each period within the year.

The contributions and pay figures entered should match the employee's contributions and pay details shown in the annual update part of the form, .

You can access help text for this area by clicking on 🥇 above the change box area.

Error messages

The following screens show an example of some of the error messages you may see:

Error example 1:

The above error messages were produced for the following reasons:

1. Because the employee's contributions for change two do not equate to 7.1% of the employees pay figure; or

2. Because the contribution rate for change two does not match the contribution rate that was shown for the year ending 2021 details,

To rectify this error the contribution rate for change two needs to be corrected to 7.1%. .

Error example 2:

The above error message has been produced because the 'period from' date for change two is not immediately after the 'period to' date for change one

There are three possible ways to resolve this error depending on the correct details:

1. Amend the 'period to' date for change 09 to 19 June 2020; or
2. Amend the 'period from' date for change 20 to 10 June 2020 or
3. Insert the missing contribution rate change from 10 June 2020to 19 June 2020

Using the details from resolution two above, the mid year contribution rate changes would be entered as follows:

Mid Year Contribution Rate Changes

	Period From	Period To	Contribution Rate	Employee Contributions	Employee Pay	Delete
1	01 April 2020	09 June 2020	5.6	£ 103 . 70	£ 1851 . 83	☐
2	10 June 2020	31 March 2021	7.1	£ 657 . 40	£ 9259 . 17	☐
3	Day Month Year	Day Month Year	Select...	£ .	£ .	☐

Add Row

Change one is from 01/04/2020 to 09/06/2020 the day before the change to 5.6%. The employees' contributions and pay for this period only must also be entered.

Change two is from 10/06/2020 to the end of the cyclic update year. Again the contributions and pay for this period only must be entered.

The total of the contributions and pay shown in the change area should then be the same as the total of the contributions and pay shown for the year end 2021 details.

Changes to employment/personal details:

The final part of the SD55 Termination form is where you can input changes to the members' employment details and/or personal details, as follows:

? Help for changes section

Please note when changing to or from WT, or if there is a change in Part Time standard, please click here for examples of how you should notify us of this change.

Also, we can only accept up to 5 changes Online at present. If you have more, or you have any additional information that you wish to notify us of, please e-mail us remembering to tell us your EA/GP code, name, the SD or NI Number of the member you are submitting the information for and the exact changes that were not submitted Online.

From (if applicable) dd/mm/yyyy			Nature of change (dob = dd/mm/yyyy)	
1			No Change ▾	
2			No Change ▾	
3			No Change ▾	
4			No Change ▾	
5			No Change ▾	

Please enter your changes in date order

Submit   **Cancel**

Enter date of change(if required)   Select type of change   Enter change details

Again, there is full help text available and this is particularly useful if you are completing changes to part time and/or changes to standard hours. The areas available for change are:

- *Surname* – no date of change is required
- *Forename(s)* – no date of change is required
- *NI number* – no date of change is required
- *Capacity code* – date of change required
- *EA code* – no date of change required
- *Date of birth* – see example below
- *To whole time (WT)* – date of change required (only available if employment is PT) see example below
- *To part time (PT)* – date of change required (only available if employment is WT) see example below
- *Actual part time (PT) hours* – date of change required (only available if employment has not been PT before) see example below
- *Standard hours* – date of change required
- *Change to standard hours* – date of change required (relevant only where standard hours for an existing PT employment change)
- *Change of mental health officer (MHO) status* – date of change required
- *Disallowed mental health officer (MHO days post 05/04/1988)* – no date of change required (to be completed where disallowed days apply and employment is MHO)
- *Date of commencement*

A maximum of five changes can be completed and you should always start with the first change line. If you need to input more than five changes there is a link to email NHSBSA of the additional change data.

Some changes, such as, from whole time to part time, need to be in a specific order, to enable them to process successfully.

Changes from whole time (WT) to part time (PT)

If a member (other than capacity 3, 8 or 10) is changing to PT and has previously been PT within the employment then select 'To PT' from the drop down selections and enter the date of change to PT.

Actual hours do not need entering. Standard hours **only** need entering if they are changing from those already held on our records:

Example 1

Change for members (other than capacity code 3, 8 or 10) changing from WT to P/T (for the first time) with standard hours of 37.5 then later change back to WT, should be recorded as follows:

From (if applicable) dd/mm/yyyy			Nature of change (dob = dd/mm/yyyy)	
1	05	10	2020	To Part Time	
2	05	10	2020	Actual Part Time Hours	2000
3	05	10	2020	Standard Hours	3750
4	01	02	2021	To Whole Time	
5				No Change	

Please enter your changes in date order

Submit   Cancel

Please enter the actual PT and standard hours in the format ' nnnn' within the range 0100-4900. PT must be less that Standard hours

Example 2

Change for members (other than capacity code 3, 8 or 10) who have already been PT within the employment who change to WT and then back to PT. Only the dates of change to PT and WT are needed, unless the standard hours change from those already held:

From (if applicable) dd/mm/yyyy			Nature of change (dob = dd/mm/yyyy)	
1	05	06	2020	To Whole Time	
2	25	02	2021	To Part Time	
3				No Change	
4				No Change	
5				No Change	

Please enter your changes in date order

Submit   Cancel

Example 3

Change for members (other than capacity code 3, 8 or 10), whose PT standard hours of 40.00 are changing to 37.5.

New actual hours per week are not to be shown but hours worked to date of change (hours worked to date of change = 650 hours) must be entered as in the following example

	From *(if applicable)* dd/mm/yyyy			Nature of change *(dob = dd/mm/yyyy)*	
1	01	03	2020	Change to Standard Hours ⌄	3750/650
2				No Change ⌄	
3				No Change ⌄	
4				No Change ⌄	
5				No Change ⌄	

Please enter your changes in date order

Submit   **Cancel**

> **Important note for ESR users** – if you have already notified us of a change to standard hours via ESR and then choose to update and/or close the employment down via POL this SD55 will not automatically pick up the change notified via ESR and you will need to repeat the change details.

Converting sessional contracts to hours for non- medical staff

For members (other than capacity code 3, 8 or 10) who are employed PT on a sessional basis, record the change to PT as hours and not sessions. Convert the sessions to hours by multiplying the paid sessions per week by the sessional length to give actual hours. The standard hours are obtained by multiplying the standard sessions by the standard length.

Capacity Codes 3, 8 or 10

These members cannot change to or from WT or PT using the changes box. Their employments must be closed down and re-opened at the date of change in contract.

Disallowed MHO days post 05/04/1988

If the member changes to MHO within the period of update and has any disallowed MHO days post 05/04/1988 please select this option from the drop down menu and enter the relevant amount of disallowed days in the text box provided, in four digit format.

No date is required for this change.

The full amount of disallowed days must also be shown in the disallowed days field on the main part of the form.

General information re change area

You should always start with the first change line and changes from WT to PT need to be in chronological order.

If any mismatching information is entered you will receive on screen error messages as shown in the following examples:

No date of change entered, where date is required.

From (if applicable) dd/mm/yyyy			Nature of change (dob = dd/mm/yyyy)	
1			To Part Time ▼	
2			No Change ▼	
3			No Change ▼	
4			No Change ▼	
5			No Change ▼	

Please enter your changes in date order

** Please enter a valid date - change box 1

Submit   **Cancel**

Incomplete change details where there is a change to PT for the first time:

From (if applicable) dd/mm/yyyy			Nature of change (dob = dd/mm/yyyy)	
1	30	09	2020	To Part Time ▼	
2			No Change ▼	
3			No Change ▼	
4			No Change ▼	
5			No Change ▼	

Please enter your changes in date order

** Please enter Actual Part-time hours in Change box 2 and Standard hours in Change box 3

Incomplete change to date of birth:

From (if applicable) dd/mm/yyyy			Nature of change (dob = dd/mm/yyyy)	
1			Date of Birth ▼	
2			No Change ▼	
3			No Change ▼	
4			No Change ▼	
5			No Change ▼	

Please enter your changes in date order

** Please enter a valid DOB in the format dd/mm/yyyy - Change box 1

Submit   **Cancel**

Correct date of birth change

From (if applicable) dd/mm/yyyy			Nature of change (dob = dd/mm/yyyy)	
1			Date of Birth ▼	15/01/1972
2			No Change ▼	
3			No Change ▼	
4			No Change ▼	
5			No Change ▼	
			Please enter your changes in date order	

Once you have successfully completed the form you will receive a confirmation screen reflecting the details submitted to NHSBSA.

When this form processes via the NHSBSA system it will update the member record and you will receive an SD55 notification advising the date to which the employment has been updated.

If you do not receive this notification this is an indication that the form has not successfully processed to the member record either due to incorrect information on the form or interaction with other employment details on the member record.

The form will be placed in 'Error Handling' and be allocated to either the you or NHSBSA for investigation.

 'Error handling' is in the main employer menu of POL.

Changes to the SD55 from 01 April 2015

The SD55 termination e-forms along with the employer error handling form will be amended to:

- Remove Annual Basic Pay
- Include new Early Retirement Reduction Buy Out (ERRBO) contribution field
- The validation override dialog will be replaced to support new override functionality

A tick box is shown to the left of each queried field. On ticking the first box the dialog below is displayed:

Override confirmation

By overriding the validation you are confirming that the values you have inserted are correct and benefits may be calculated on them. If these values are incorrect please amend as appropriate and un-tick the checkbox before you submit the form

[OK]

Override confirmation

By overriding the validation you are confirming that the values you have inserted are correct and benefits may be calculated on them. If these values are incorrect please amend as appropriate and un-tick the checkbox before you submit the form.

Please provide the reason that these values are correct: […… text entry 100 characters]

[Cancel]   [Submit]

The revised SD55 termination form will now look as follows:

You are currently logged-in as an Employer for **EA 3414**

Name		
NI Number		
SD Number		
Your Payroll Reference Number	?	
EA Code		
Employment ID		
Capacity Code		
WT / PT Status		
Employment Type		
Date of commencement		
Contributions year		
Employee's contributions (no AVCs)	?	£ 500 . 00 p
Employee's pensionable pay (no deemed)	?	£ 10000 . 00 p
Contribution rate (at year end)	?	5.0 ⌄
Employer's contributions	?	£ 1430 . 00 p
Employer's pensionable pay (include any deemed)	?	£ 10000 . 00 p
Employee's gross pay (include any non pensionable)	?	£ 10000 . 00 p
Employee's AVCs (no money purchase)	?	£ . p
ERRBO contributions	?	£ . p
Number of non-pensionable days	?	
Total number of pensionable hours or paid sessions worked (part time staff only)	?	300

Additional Pension 1

Identifier:	?	
Contributions:	?	£ . p
Instalments:	?	

Additional Pension 2

Identifier:	?	
Contributions:	?	£ . p
Instalments:	?	

The new **early retirement reduction buy out (ERRBO)** contributions field is shown above.

NI earnings in year of termination and preceding tax year for member that left prior to 06.04.2016

These fields require completion in most cases. If the employment spans only one financial year but more than one tax year (6 April to 5 April) then both fields require completion. If the

employment spans only one tax year then only the field for tax year of termination requires completing.

If the member if female, paying the married women's reduced rate of NI then the letter "E" together with an amount should be inserted. Your entry will be validated and if incorrect you will receive an on-screen message prompting you to check your entry.

If the member reaches State Pension age in the year of termination then only the year preceding termination requires completion.

Where completed incorrectly you will receive an on screen message advising what information is required to be input/deleted.

Principal practitioner - You should not complete these boxes. This will be validated and you will receive an on-screen message asking you to remove an incorrect entry.

Arrears of employee scheme contributions:

If the member has incurred arrears of normal scheme contributions or, you were requested to collect arrears incurred during a previous employment and these have not been collected by the time the employment ends, then these should be recorded on the terminal SD55.

If you were requested to collect arrears incurred during a previous employment and these have been fully collected then you should enter '0.00' in the arrears of contributions field. If they have been partly but not fully collected you should enter the reduced outstanding amount.

If there was not any existing arrears and no arrears have been incurred then the field should be left blank, do not enter zeros.

You will receive an onscreen message if you enter incorrect information.

Arrears of additional voluntary contract (AVC) contributions:
If the member has an active AVC contract within the financial years held on the termination form then the arrears of AVC contributions field must be completed in all cases. If there is no AVC arrears then '0.00' must be entered, otherwise enter the amount of actual AVC arrears.

You will receive an onscreen message if you fail to complete this field where an entry is mandatory or, if you complete the field and there is no open AVC contract for the period of the update you are submitting.