

## 2015 Scheme GPs

### Claim form - Reimbursement of NHS Pension Scheme contributions - 2015/16 & 2016/17

#### Guidance for GPs who have already completed their 2015/16 & 2016/17 pension forms

This form must only be used by GPs in England and Wales who are seeking reimbursement of some of their 2015 NHS Pension Scheme contributions paid in years 2015/16 and/or 2016/17 because their tiered employee contribution rate was set using the 'annualise then add' instead of the 'add then annualise' method. The new GP tiered contribution guidance in the Practitioner section of our website explains the difference between the two methods.

Those GPs affected are likely to be GPs who had more than one GP pensionable post in the same year and who did not work the full NHS Pension Scheme year; i.e. from 1 April to 31 March. To be eligible to claim reimbursement the GP must have:

- 2015 scheme membership in years 2015/16 and/or 2016/17, and
- have already completed and submitted their 2015/16 and/or 2016/17 GP pension forms (GP Provider certificates, type 2 self-assessment forms, and locum forms), and
- calculated a lower tiered rate of contributions using the new guidance and annualising calculator on the our website.

A GP seeking reimbursement must complete this form in full and forward it (along with an extract from the calculator or a manual calculation as evidence of their eligibility) to NHSE/PCSE (England) or the Local Health Board (Wales) before 14 June 2019.

**If a GP worked in both England and Wales they must complete separate claim forms.**

**This form must not be used for routine end of year adjustments such as where the GP over estimated their NHS pensionable income.**

#### Guidance for GPs who have not completed their 2015/16 & 2016/17 pension forms

GPs who have not yet completed their 2015/16 and/or 2016/17 pension forms must complete them as soon as possible in order to comply with the statutory NHS Pension Scheme Regulations. They should refer to the new tiered employee contribution guidance for GPs on our website when completing the forms. Where appropriate they should use the annualising calculator (also on the website) to determine the correct tiered contribution rate. The forms, guidance, and calculator are all located in the Practitioner webpage.

Where a GP has not yet completed and submitted their 2015/16 and/or 2016/17 pension forms they should do so immediately by downloading the latest versions our website. They must **not** complete this form.

## The GP Tiered Rates

The tiered employee contribution rates from 1 April 2015 until 31 March 2019 are outlined below.

Tier	Total actual or annualised GP pensionable income in the NHSPS year	Tiered employee contribution rate
1	Up to £15,431.99	5%
2	£15,432.00 to £21,477.99	5.6%
3	£21,478.00 to £26,823.99	7.1%
4	£26,824.00 to £47,845.99	9.3%
5	£47,846.00 to £70,630.99	12.5%
6	£70,631.00 to £111,376.99	13.5%
7	£111,377.00 and over	14.5%

A fully protected 1995 or 2008 Section GP's tiered employee contribution rate is based on their (actual) total GP pensionable income in the relevant NHS Pension Scheme year. As annualising does not apply they **must not** complete this form.

A 2015 Scheme GP member's tiered employee contribution rate is based on their annualised GP pensionable income in the relevant NHS Pension Scheme year. As they are subject to annualising they should consider completing this form if they are seeking reimbursement and were not in pensionable service for the full 365 days in either 2015/16 or 2016/17, had more than one GP pensionable post in 2015/16 or 2016/17, and they adopted the 'annualise and add' method when setting their tiered rate.

## Part 1: Your personal details

Please provide the following information.

Your name in full	<input type="text"/>
Your National Insurance number	<input type="text"/>
Your NHS Pension Scheme reference (member/SD) number *	<input type="text"/>
Your email address**	<input type="text"/>
Your postal address **	<input type="text"/>
Your telephone number (this is not compulsory)	<input type="text"/>

\*This is an 8 digit reference number.

\*\*Providing this information will help if NHSE/PCSE, the LHB, or a former surgery/OOHP, needs to contact you to verify information or to facilitate reimbursement.

## Part 2: Contributions

In column 2 enter the original tiered contribution rate declared on your pension forms for the relevant year. In column 3 enter the total GP employee contributions you paid in the relevant year. Enter the total contributions paid in column 3.

By using information taken from the calculator ('add and annualise' tab) or a manual calculation enter the revised tiered contribution rate for the relevant year in column 4. In column 5 enter the revised contributions payable in the relevant year; i.e. annualised pensionable pay x revised tiered % rate. Enter the total amount in column 5.

1	2	3	4	5
Year	Original tiered rate	Original contributions paid	Revised tiered rate	Revised contributions payable
2015/16	%	£	%	£
2016/17	%	£	%	£
Total	-----	£	-----	£

Subtract the total amount in column 5 from the total amount in column 3. Enter the difference in The Reimbursement Box below. This is the amount that will be reimbursed to you.

The Reimbursement Box:

£ <input type="text"/>
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### Part 3: Freelance GP Locums - Reimbursement method

Only complete Part 3 if you were **solely** a 2015 Scheme freelance GP locum in 2015/16 and/or 2016/17; i.e. you were not also a GP Provider or a salaried GP. The amount declared in The Reimbursement Box will be reimbursed directly to you by NHSE/PCSE or the Local Health Board.

Please enter your bank or building society details below. Any reimbursement can only be paid to your account, including a joint account.

Name of account holder	
Bank/Building Society sort code	
Account holder number	

Now, please complete Part 7

### Part 4: Out of Hours GPs - Reimbursement method

Only complete Part 4 if you were **solely** a 2015 Scheme Out of Hours (OOHs) GP in 2015/16 and/or 2016/17. The amount declared in The Reimbursement Box will be sent by NHSE/PCSE or the Local Health Board to the relevant Out of Hours Provider (OOHP). You will be informed when the OOHP has received the monies so you can contact them to arrange for reimbursement.

Please list below all of the OOHPs you worked for in 2015/16 and 2016/17 and the reimbursement amount you are seeking in respect of each.

The total amount cannot be more than the amount declared in The Reimbursement Box.

Name of OOHP	Amount to be reimbursed
	£
	£
	£
	£
	£
	£
	£
	£
	£
	£
	£

Now, please complete Part 7.

### Part 5: GP providers and salaried GPs - Reimbursement method

Complete Part 5 if you were 2015 Scheme GP Provider (i.e partner or single-hander) or a salaried GP (or both) in 2015/16 and/or 2016/17. The amount declared in The Reimbursement Box will be sent by NHSE/PCSE or the Local Health Board to the relevant Practice. You will be informed when the Practice has received the monies so you can contact them to arrange for reimbursement.

Please list below all of the GP Practices you worked for in 2015/16 and 2016/17 and the reimbursement amount you are seeking in respect of each. If you worked in more than five Practices complete a separate sheet. The total amount declared cannot be more than the amount stated in The Reimbursement Box.

Name of GP Practice	Amount to be reimbursed
	£
	£
	£
	£
	£

Now, please complete Part 7.

### Part 6: 'Portfolio GPs' - Reimbursement method

Complete Part 6 if in 2015/16 or 2016/17 you were a freelance GP locum **and also** a GP Provider, and/or a Salaried GP, and/or an OOHs GP.

With regards to freelance GP locum contributions please enter the reimbursement amount and your personal bank or building society details below. The account may be a joint account. You will be reimbursed directly by NHSE/PCSE or the Local Health Board.

Amount to be reimbursed

£

Name of account holder

Bank/Building Society sort code

Account holder number

With regards to GP Practice and/or OOHs contributions please list below all of the GP Practices or OOHPs you worked for in 2015/16 and 2016/17 and the reimbursement amount in respect of each. You will be informed when the Practice/OOHP has received the monies so you can contact them to arrange for reimbursement. If you worked in more than six Practices/OOHPs complete a separate sheet. The total amount cannot be more than the amount declared in The Reimbursement Box.

Name of GP Practice / OOHP	Amount to be reimbursed
	£
	£
	£
	£
	£
	£

Now, please complete Part 7.

### Part 7: Declaration

I am a registered and qualified GP and was a member of the 2015 Scheme during 2015/16 and/or 2016/17.

I have already submitted my GP pension forms for years 2015/16 and 2016/17.

I claim reimbursement of NHS Pension Scheme GP employee contributions in respect of years 2015/16 and/or 2016/17 as I originally used the 'annualise then add' method when setting my tiered rate.

I paid employee contributions in respect of all my GP pensionable income..

I confirm that when calculating the revised contribution tiered rate I have excluded income in respect of Officer (i.e. NHS salaried hospital doctor) pensionable service and non-NHS (i.e. private) income.

I declare that all the information on this form is correct.

Signature

Name

Date

### Part 8: Next steps and guidance

If you are claiming reimbursement of your GP employee contributions in respect of work performed in England send this form and the calculator extract (or manual calculation) to PCSE using the PCSE 'Contact Us' webpage and select the GP Pensions form. Within this form when you are presented with the pensions query field select the 'Additional Pension/AVC/Top Up' option. You will receive an acknowledgement.

If you are claiming reimbursement of your GP employee contributions in respect of work performed in Wales send this form and the calculator (or manual calculation) extract to [primarycareservices@wales.nhs.uk](mailto:primarycareservices@wales.nhs.uk) You will receive an acknowledgement.

If you worked in both England and Wales you must complete separate claim forms. The amount declared in the The Reimbursement Box at Part 2 should only relate to England or Wales; not both.

Once this form has been submitted the reimbursement process will commence. It may take up to three months for yourself, the surgery, or the OOHP to receive the monies.

If you do not complete this form correctly it will be returned to you for resubmission. Any resubmitted forms must be made no later than 14 June 2019.

NHSE/PCSE (England) or the LHB (Wales) cannot provide advice in completing this form. If you have any queries about your NHS pension please refer to the Practitioner webpage in the Member Hub section of our website.