NHS Pensions Online (POL) Guide

25. ADP4 (EA Code Change)

The ADP4 E-Form allows you to: Change the Employing Authority (EA) code for single, multiple or all members who are currently employed with you and are changing to another EA Code but remaining in the same employment. See a full list of members who have a current open employment with you. Check start dates, employment ID, Superannuation Division (SD) Reference No. Check the date to which their pension record has been updated Extract the information from the list into an Excel spreadsheet Print the full list of your active scheme members Welcome to the NHS Pension Scheme ONLINE e-forms NHS Pensions Agency 4 - 5812 Back Print Employer Menu E-Forms Exit Online Services SD55 Annual Update Member search <u>SD55</u> Terminating a period of membership Site Update <u>SD55G</u> Updating a members personal details SD55E Change a members employment details <u>SS10</u> JOINER - for Trusts, PCT's and GP Practice Doctors SS14 JOINER - for practitioners Automated Forms Automated requests for information - IMPORTANT Change to WT / PT Retrospective Change to WT / PT ADP4 EA Code change Non-updated records Non-updated records AW8 Pension application form <u>RF12</u> Refund application form Agenda For Change - Pay Protection Agenda For Change

Although the member record will be updated with an EA Code change within a couple of hours, the list of members in the ADP4 for the new EA Code is updated overnight and you will not see the changes you have made until the next day.

If you have submitted a joiner form or a cyclic update and you want to check if this has processed successfully, the ADP4 list is a good way of checking this.

It is also useful when dealing with some errors and the Error Handling Guide explains how the ADP4 can help.

Once you have selected the link in the E-Forms menu you will be presented with the list shown below:

	Please Note: This data was correct as at 08/05/2018: 13:41. Any changes made to personal or employment details after this time will not be reflected													
New	New EA Code Update Selected Update All Search by Please Select V Search													
							ADP4							
Surname Forename NI number SD number Scheme Emp ID EA Ref Start Date Updated to SC/MHO Added Yrs Additional Pension ERRBO WTPT TV In												TV In		

Please note: The details shown on all screen examples are taken from a test database.

The list can be sorted into any order by clicking on the column title that you wish the order to be in.

i.e. if you want the list in National Insurance order click on the title and the list will be sorted into NINO order.

You can also change the order of the columns by dragging and dropping the column into the position you wish. This is done by left clicking and holding and moving the mouse into the position you want.

	Please Note: This data was correct as at 08/05/2018: 13:41. Any changes made to personal or employment details after this time will not be reflected												
New EA Code Update Selected Update All Search by Please Select V Search													
	ADP4												
Surname	Surname Forename Ni number SD number Scheme Emp ID EA Ref Start Date Updated to SC/MHO Added Yrs Additional Pension ERRBO WTPT TV In												

The following example shows the "Scheme" column is being moved next to "Forename":

		Please Note: Th	nis data was correc	ctas at 08/0	05/2018: 1	3:41. Any (changes	s made to perso	onal or employme	nt details aft	er this time w	ill not be reflected			
New EA Co	ode	Update Selecte	ed	Update A	II				Search by	Please Sele	ect 🗸		Searc	ch	
				+			AI	DP4							
Surname	Forename	NI number	SD number	Scheme	Emp ID	EA Ref		Start Date	Updated to	SC/MHO	Added Yrs	Additional Pension	ERRBO	WTPT	TV In

The column has now been successfully moved:

New EA Co	de		U,date Se	lected	Jpdate Al	I			Search by	Please Sele	ct 🗸		Searc	th	
			/			Α	DP4								
Surname	Forename	Scheme	NI number	SD number	Emp ID	EA Ref	Start Date	Updated to	SC/MHO	Added Yrs	Additional Pension	ERRBO	WTPT	TV In	

If you wish to find a specific member it is best to amend the order to NINO or Surname to allow you to scroll down until you find the relevant member.

Alternatively you can enter either the SD number, NI number, Surname or EA Ref/Assignment number in the search field and select the relevant field on the drop down menu on the "search by" field, as shown below.

New EA Co	de		Update Se	elected	Update A	I			Search by	Please Select	~		Sear	ch	
							ADP4			SD number					
Surname	Forename	Scheme	NInumber	SD number	Emp ID	EA Ref	Start Date	Updated to	SC/MHO	EA Ref	Additional Pension	ERRBO	WTPT	TV In	

Please note however, that where you are changing the EA Code for a member found using the search field, the change is restricted to that member only.

There is the option to extract the data from the list into Excel or Acrobat and this is done by selecting one of the links "Export Notifications to Excel/PDF".

Once you select this link you will be asked whether you wish to open the information in Excel or save it in Excel.

The following box will appear at the bottom of your screen:

L					
l	Do you want to open or save EA3414_ADP4_List.xls (2.62 MB) from hhpol006?	Open	Save 🔻	Cancel	×
L					

If you select "open", an Excel spreadsheet will be displayed showing all members details held in the ADP4 list. You will not be taken out of Pensions Online.

If you select "save" you then have the options to "save", "save as" or "save and open":

Do you want to open or save EA3414_ADP4_List.xls (2.62 MB) from hhpol006?	Open	Save 🔻	Cancel	×
	· ·			4

It is suggested that you choose "save as". You will then be asked to name the document and can choose in which local directory and folder you wish it to be saved in. Choose a title for your document and enter this in the "File Name" field. If you wish it to be saved in a directory other than that automatically opened by your computer then choose the correct directory or search for your preferred local directory in the normal way:

CNHS Pensions On ine - Windows Int	ernet Explorer provided by E	nvision		
🖉 Save As 🔹 🔻	▼	+	×	×
Computer + (N:) pw	right\$ (\\nhspa13) 👻 🛛 👻	Search		
File name: EA5812_ADP4_L	ist.xls			
Save as type: Microsoft Office I	Excel 97-2003 Worksheet (*.xls)			
Browse Folders		Save	Cancel	
EA- 5812 Back	Print Employer Menu	E-Forms		
PLEASE NOTE: This data was cor	rect as at 08/03/2013: 12:53	3. Any changes made to p	ersonal or employm	ent details after this

To change a members EA Code, type the new EA Code in the "EA Code" box and then select "Tick to change" alongside the member(s) that you wish to allocate the new EA Code, as follows:

New EA Co	de		Update	Selected	Update A	ai				Search by	Please Sel	ect 🗸 epsurname		Sear	ch
							ADP4								
Surname	Forename	Scheme	NI number	SD number	Emp ID	EA Ref	Start Date	U	pdated to	SC/MHO	Added Yrs	Additional Pension	ERRBO	WTPT	TVI
EPSURNAME	EPFORENAME	1995							31-Mar-2017	N	N	N	N	PT	
EPSURNAME	EPFORENAME	1995						11	31-Mar-2017	N	N	N	N	WT	
EPSURNAME	EPFORENAME	1995						11	31-Mar-2017	N	N	N	Ν	PT	
EPSURNAME	EPFORENAME	1995							31-Mar-2017	N	N	N	N	WT	

Then click "Update Selected". No more than 40 members can be selected at any submission.

If all your members are changing over to a new EA Code click "Update All", there is no need to select each member.

-The bottom of the list will show further pages; click on the arrows to move between pages:

Once your selection is made you will be requested to confirm your action, as follows:

Confirmation message if "Update All" is selected:

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	New EA Cod	le 3412		Update Se	elected	Update A	II			Search by	Please Sele	ect 🗸 epsumame		Searc	:h
								ADP4							
5	urname	Forename	Scheme	NI number	SD number	Emp ID	EA Ref	Start Date	Updated to	SC/MHO	Added Yrs	Additional Pension	ERRBO	WTPT	TV In
	EPSURNAME	EPFORENAME	1995	ADP4 All C	onfirmation					×	N	N	Ν	PT	Ν
	EPSURNAME	EPFORENAME	1995	🧿 Y	ou are about to	update all th	ne Records fo	r this EA, are you sure	you want to conti	inue?	N	N	N	WT	Ν
	EPSURNAME	EPFORENAME	1995	\checkmark							N	N	N	PT	Ν
	EPSURNAME	EPFORENAME	1995			5	r/es.confirm	No, cancel			N	N	Ν	WT	N
14	Page 1	of 1 🕨 🕅	2 Expo	rt Notifications to E	cel Export Notif	fications to PDF									

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Confirmation message if "Update Selected" is selected:

	New EA Code 3416 Update Selected						Update All S						Surname	✓ epsurname		Searc	:h
								AD	P4								
s	urname	Forename	NI number	SD number	Scheme	Emp ID	EA Ref	1	Start Date	Updated	to	SC/MHO	Added Yrs	Additional Pension	ERRBO	WTPT	TV In
	EPSURNAME	EPFORENAME	ADP4 C	onfirmation							×	N	N	N	N	PT	N
	EPSURNAME	EPFORENAME	2	Below is a list of t	he members y	ou will be cl	hanging					N	Ν	N	Ν	WT	Ν
	EPSURNAME	EPFORENAME	\checkmark	All Alexandras	CD Number	Course and a second	ant ID	C				N	N	N	N	PT	N
	EPSURNAME	EPFORENAME		NI Number	5D Number 21000002	Employm 1	ent ID	EPSUR	NAME I	FORENAME		N	N	N	Ν	WT	N
					21000002	2		EPSUR	NAME	EPFORENAME							
					30	es, contirm	No, cance	el									
10-	Page 1	of 1 📄 🕅	2 Expor	t Notifications to Exce	Export Notific	ations to PDF											

Check the proposed changes carefully before selecting continue and if you have made any errors either on the new EA Code entered or the members that have been selected; select "cancel" and this will take you out of the ADP4 and back to the E-Forms menu.

If you are happy with the changes select "continue" and they will be processed at the NHSBSA the same day but will not be reflected in the ADP 4 list for the new EA Code until the next day.