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## NHS Pensions Online Guide (POL)

### 30. Agenda for Change

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## What is the Agenda for Change form for?

This is a new function within the Pensions Online E-Forms suite that allows employers to submit details to preserve their employees pay at a specific date(s) because their job was regraded to a lower pay through an “Agenda for Change” (AfC) review.

This review affected all NHS staff except doctors and dentists, and senior managers at or just below board level.

Affected employees will require their pensionable pay protecting on 31<sup>st</sup> March 2006 and will also need to be re-examined at the end of the protection period in 2011. Some members were assimilated onto AFC later and therefore received a pay rise in April 2006. Employers may not recover the pay rises. Where pay rises are not recovered it has been agreed that the date of preservation under Regulation R9 is the day before the member goes onto mark-time pay, rather than 31<sup>st</sup> March 2006.

The AfC E-Form allows employers to advise The NHSBSA of the date of the preservation and the Total Pensionable Pay (TPP) figure, which is the best of the last three years.

As we are now at the end of the protection period you will be able to submit preservation details for both the beginning of the protection period, if not already submitted via the manual spreadsheet, and the end.

You will only be able to submit details electronically where

- The members’ employment spanned 31.03.2006
- They have been employed with you for at least 365 days at the preservation date.
- They have at least two years qualifying membership at its’ calendar length at the preservation date entered.

You can submit details for members who are no longer employed with you, providing they were in pensionable employment with you on the preservation date(s) and meet the above criteria.

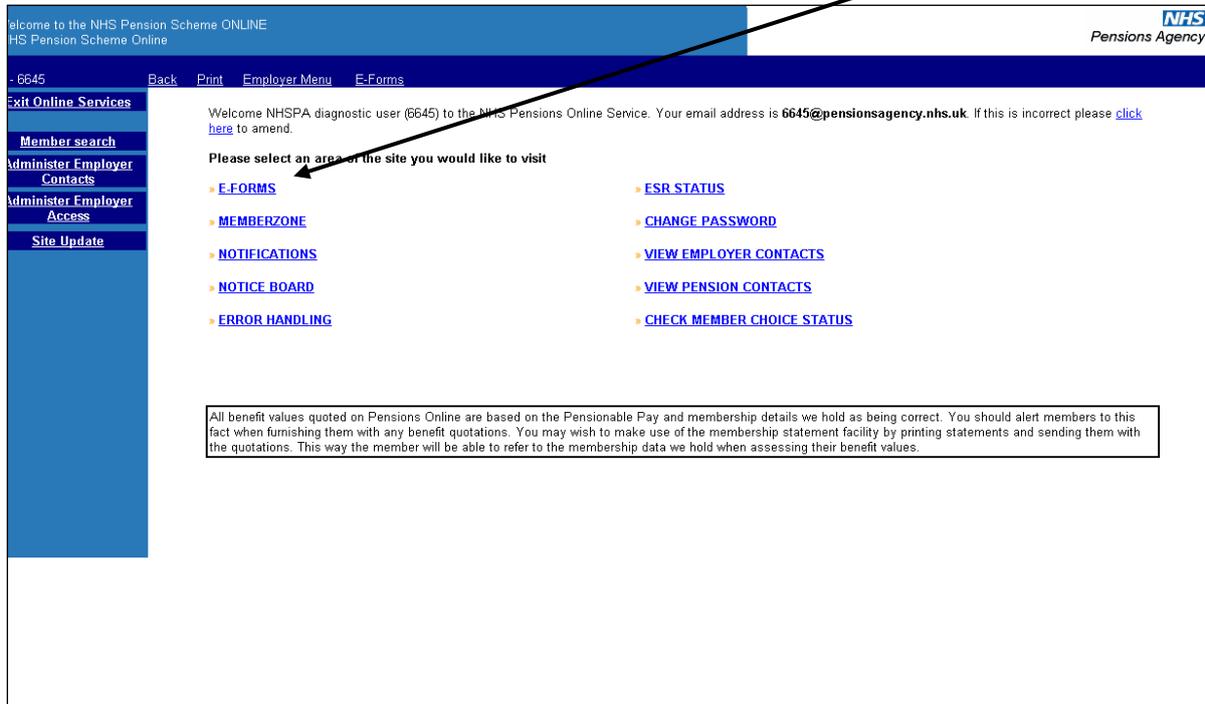
Where the employment remains the same but the responsible employer has changed, The NHSBSA may hold the revised EA Code from the actual employment start date and not from the date of change of responsible employer (unless the employment was closed and re-opened with the new employer). If this is the case the new responsible employer must submit the preservation details.



This form is only for the submission of preservation details for scheme members affected by the agenda for change review. It **must not** be used to submit preservation details for any other reason.

## How do I access this form?

Log into Pensions Online in the normal way and select the link to E-Forms:



Welcome to the NHS Pension Scheme ONLINE  
NHS Pensions Agency

6645 Back Print Employer Menu E-Forms

Exit Online Services

Member search

Administer Employer Contacts

Administer Employer Access

Site Update

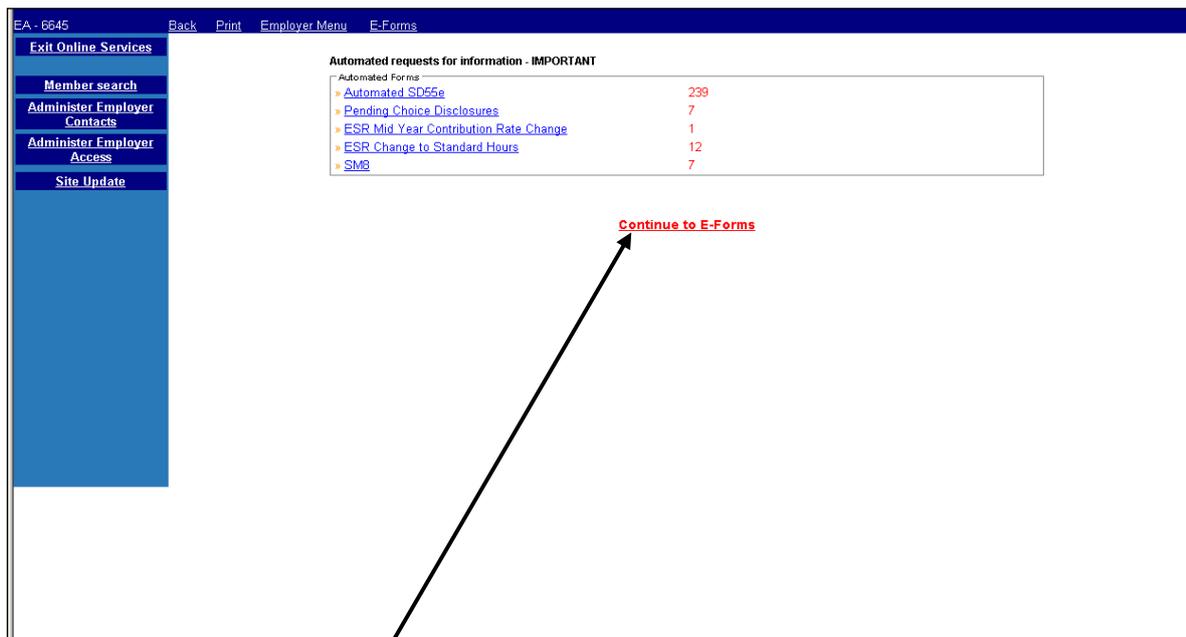
Welcome NHSPA diagnostic user (6645) to the NHS Pensions Online Service. Your email address is 6645@pensionsagency.nhs.uk. If this is incorrect please [click here](#) to amend.

Please select an area of the site you would like to visit

- [E-FORMS](#)
- [MEMBERZONE](#)
- [NOTIFICATIONS](#)
- [NOTICE BOARD](#)
- [ERROR HANDLING](#)
- [ESR STATUS](#)
- [CHANGE PASSWORD](#)
- [VIEW EMPLOYER CONTACTS](#)
- [VIEW PENSION CONTACTS](#)
- [CHECK MEMBER CHOICE STATUS](#)

All benefit values quoted on Pensions Online are based on the Pensionable Pay and membership details we hold as being correct. You should alert members to this fact when furnishing them with any benefit quotations. You may wish to make use of the membership statement facility by printing statements and sending them with the quotations. This way the member will be able to refer to the membership data we hold when assessing their benefit values.

You will then see the list of automated e-forms for action, as follows:



EA - 6645 Back Print Employer Menu E-Forms

Exit Online Services

Member search

Administer Employer Contacts

Administer Employer Access

Site Update

Automated requests for information - IMPORTANT

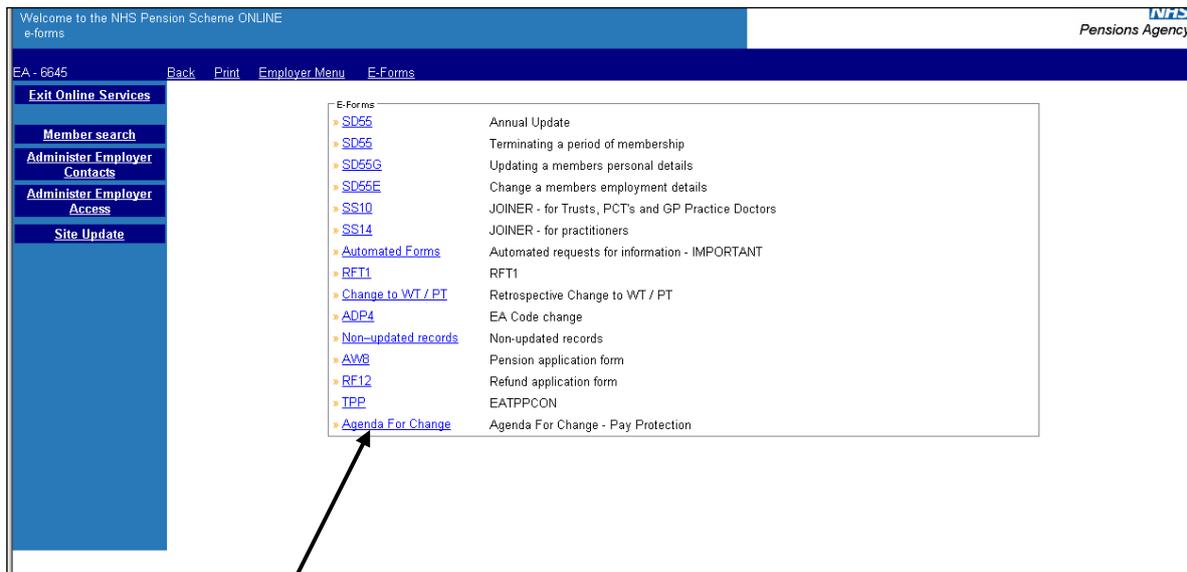
Automated Forms

<a href="#">Automated SD55e</a>	239
<a href="#">Pending Choice Disclosures</a>	7
<a href="#">ESR Mid Year Contribution Rate Change</a>	1
<a href="#">ESR Change to Standard Hours</a>	12
<a href="#">SMG</a>	7

[Continue to E-Forms](#)

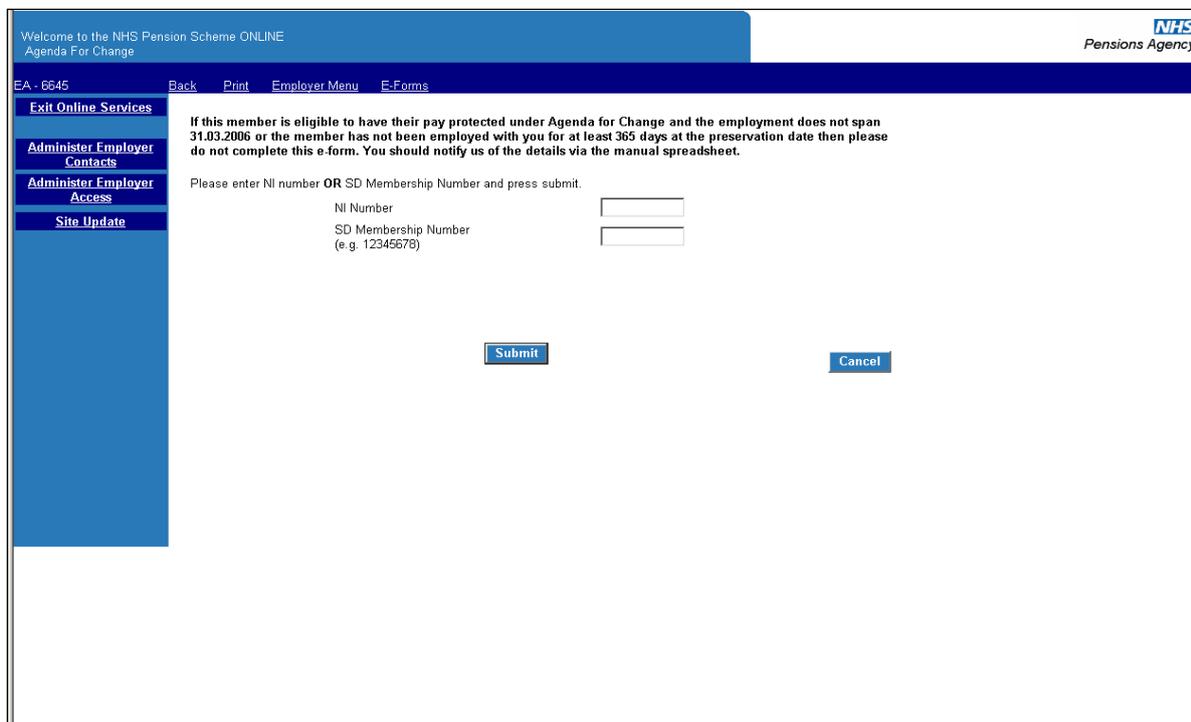
Select "continue to E-Forms"

This will then take you to the full list of E-Forms, as follows:



The "Agenda for Change" form is at the bottom of the E-Forms list.

After selecting this link you will be asked to enter either the SD reference number or the National Insurance number for the member whom you wish to enter preservation details:



If you enter details for a member who does not have an employment spanning 31.03.2006 you will receive the following on-screen message:

Welcome to the NHS Pension Scheme ONLINE  
Agenda For Change

EA - 6645    Back    Print    Employer Menu    E-Forms

**Exit Online Services**

**Administer Employer Contacts**

**Administer Employer Access**

**Site Update**

If this member is eligible to have their pay protected under Agenda for Change and the employment does not span 31.03.2006 or the member has not been employed with you for at least 365 days at the preservation date then please do not complete this e-form. You should notify us of the details via the manual spreadsheet.

Please enter NI number OR SD Membership Number and press submit.  
**\*\*No employment(s) spanning 31/3/2006 has been found with your EA for the NINO entered.**

NI Number

SD Membership Number (e.g. 12345678)

Where a valid entry is made you will be taken to the full form for completion:

Welcome to the NHS Pension Scheme ONLINE  
Agenda for Change

EA - 6714    Back    Print    Employer Menu    E-Forms

**Exit Online Services**

**Site Update**

Full names (Surname/Forenames):

Payroll Reference Number:

Employment ID: 1

National Insurance Number:

SD Number:

EA Code: 6714

Start Date Of Employment: 06/06/2005

End Date Of Employment: 12/01/2007

Effective Date Of Existing AFC:

🔔 Preservation Date (DD/MM/YYYY):

🔔 Actual TPP:

🔔 Notional Whole Time TPP:

🔔 TPP Period Start Date (DD/MM/YYYY):

🔔 TPP Period End Date (DD/MM/YYYY):

## How to complete the form

Each field is supported by help text, which is accessed by clicking on “?”.

### Preservation Date:

This is a mandatory field and must be within the employment start date and latest cyclic update or termination date.

#### Example 1

If the members record has only been updated to 31.03.2005 and the preservation date you enter is 31.03.2006, you will receive an onscreen message:

*“Preservation date entered is not within the employment dates – please check your entry. If correct, this employment requires updating before you can submit Agenda for Change details – please submit SD55 via E-Forms before continuing.”*

You will then be given the option to amend the date you have entered if an error has been made, or cancel your action.

Once the SD55 update has processed to the member record you will then be able to successfully submit the Agenda for Change preservation details.

#### Example 2

If employment with you started on 01.05.2006 and the member was in the same employment that was the responsibility of a different employer before that date; and you entered a preservation date of 31.03.2006, you will receive the following onscreen message:

*“Preservation date must be within the dates of employment for this employment ID.”*

You will then be given the option to amend the date you have entered or cancel your action.

If the preservation date you have entered is correct then you will need to cancel your action and make arrangements with the previous employer to submit the Agenda for Change preservation details. If a further preservation applies at the end of the Protection Period (01.04.2011) you will be able to submit these details yourself.

Where the member has not accrued at least 2 years qualifying membership at the date entered they are not entitled to have their membership preserved and you will receive an onscreen message advising of this fact. You will not be able to continue with the Agenda for Change preservation.

If the member has not been in pensionable employment with you for at least 365 days at the preservation date you cannot submit details via Pensions Online and will receive an onscreen message requesting that you submit the details via the manual spreadsheet.

If you are submitting Agenda for Change Preservation details at the end of the protection period in 2011 and there is not 5 years between this date and the preservation date at the beginning of the protection period, you will be asked to confirm the date you have entered.

### **Actual Total Pensionable Pay (TPP)**

This field must be completed in all cases. If the figure you enter is greater than £70,000 you will be asked to check the amount before continuing.

### **Notional Whole Time Total Pensionable Pay (TPP)**

This field must be completed in all cases where the member is part time for any period within the TPP year. If you complete the field when the member is not p/t during the TPP period you will receive the following onscreen message:

*“The employment is not p/t within the TPP year – this field should not be completed, please delete your entry.”*

If a notional w/t TPP is applicable and you receive the above message then we have not been advised of the change to p/t and you will need to cancel your action and submit the change to p/t details together with any annual hours worked.

Once the members pension record is updated with the change details you will be able to complete & submit the Agenda for Change preservation form.

If the member is p/t and you do not complete the field you will receive a message asking you to make an entry before being able to continue.

Likewise if you do not complete this field and you receive a message asking for the details this is because the member changed to p/t within the TPP period.

If the change to p/t was submitted in error you will need to cancel your action, advise The NHSBSA of the correct employment details, i.e. confirmation that the change to p/t should be deleted (or the date amended) etc. Once The NHSBSA records have been amended you will be able to complete & submit the Agenda for Change preservation form.

If you submit a figure in excess of £70,000 you will be asked to confirm your entry before continuing.

## Total Pensionable Pay (TPP) Period Start Date:

This field must be completed in all cases and the date entered must be within the employment start date and cyclic update or termination date. It must also be no more than 3 years 364 days\* before the Preservation Date you entered.

\* This is to allow for any disallowed days within the TPP year

This date must also be before the TPP Period End Date and must not be after the Preservation Date you have entered.

If these criteria are not met you will receive an onscreen message asking you to revise the date you have entered before being able to continue.

## Total Pensionable Pay (TPP) Period End Date

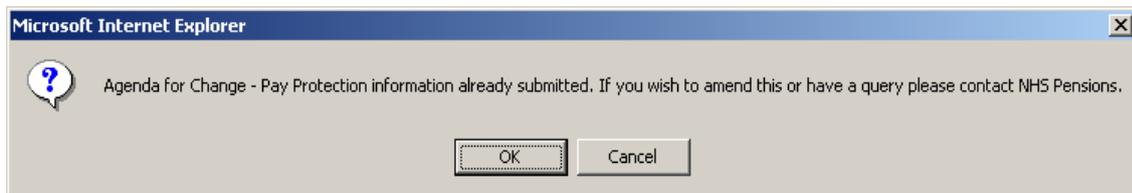
This field must be completed in all cases and the date entered must be within the employment start date and cyclic update or termination date.

It must also be no more than 3 years before the Preservation Date and must not be later than the Preservation Date you have entered.

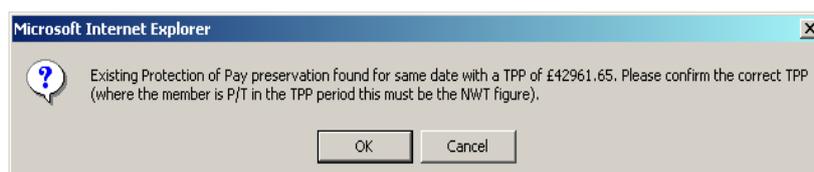
If these criteria are not met you will receive an onscreen message asking you to revise the date you have entered before being able to continue.

## Submitting Details:

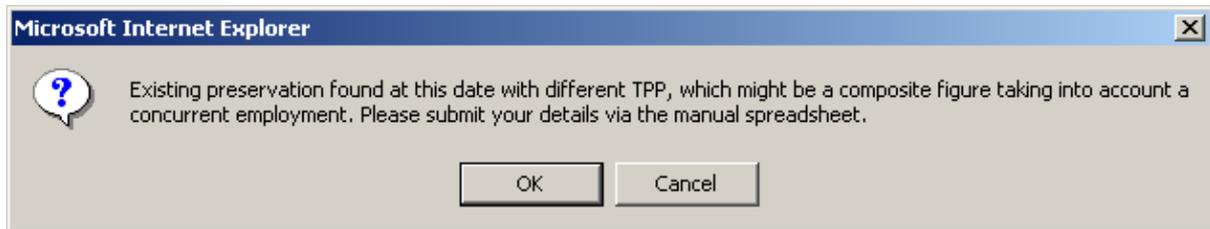
When you click "submit" a further check is made to determine whether The NHSBSA already hold an Agenda for Change preservation for the same preservation date. If one is held the details will not process and you will receive the following on screen message:



Details of Agenda for Change Preservations have previously processed as Voluntary Protected Pay or Reg R (9) preservations, and if you now submit these details again and the Agenda for Change submission shows the same preservation date but a different TPP, you will receive the following message to confirm which details are correct:

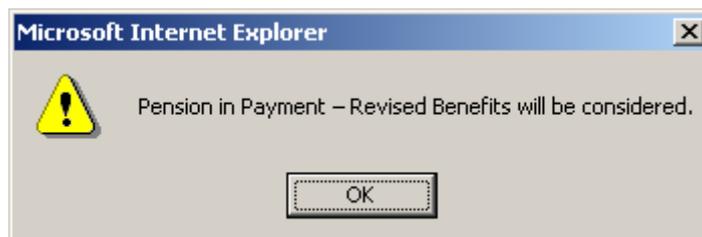


Where an existing VPP (Voluntary Protected Pay) or Reg R (9) preservation is found with the same date but there are concurrent p/t employments, you will receive the following on screen message:



### Member is already on Pension, has Transferred Out or Died:

If at the time of submitting the preservation details the member has already retired and is in receipt of benefits; has transferred membership to another pension scheme; has transferred membership from the 1995 Section to the 2008 Section of the NHS Pension Scheme or has died, you will receive a message confirming that the benefits in payment, or transfer calculation will be revised:



The NHSBSA will the re-calculate the benefits and where a split benefit calculation is more beneficial a sub award or revised transfer value will be paid.



## Preservation at the end of the protection period in 2011

You will be able to submit further Agenda for Change preservation details if the member has still suffered a reduction in pay at the end of the protection period.

The details requested are the same but there will be some additional validation checks as follows:

### Preservation Date:

Members are eligible for a further preservation of pay if they have still suffered a reduction at the end of the 5-year protection period. On such cases the effective date (deemed date following the TPP period) of the existing AfC preservation will be populated on the e-form. Generally this will be 01.04.2006 and you will receive an on-screen warning message if the preservation date for the end of the protection period is before 01.04.2011, asking you to confirm the date you have entered, as shown on the example screen below.

In some cases where the TPP periods for the preservation(s) are not immediately prior to the preservation date and are in an earlier financial year the warning message may be displayed. If the dates you have entered are correct then tick the check box alongside the TPP Period End Date field.

The screenshot shows the 'Agenda for Change' form in the NHS Pension Scheme ONLINE system. The form is titled 'Welcome to the NHS Pension Scheme ONLINE Agenda for Change' and includes the NHS Pensions Agency logo. The form ID is 'EA - 6817'. The form contains the following fields and values:

Full names (Surname/Forenames):	
Payroll Reference Number:	
Employment ID:	2
National Insurance Number:	
SD Number:	
EA Code:	6817
Start Date Of Employment:	01/09/2002
End Date Of Employment:	
Effective Date Of Existing AFC:	01/04/2006
Preservation Date (DD/MM/YYYY):	31/03/2008
Actual TPP:	29000.00
Notional Whole Time TPP:	
TPP Period Start Date (DD/MM/YYYY):	01/04/2007
TPP Period End Date (DD/MM/YYYY):	31/03/2008 <input type="checkbox"/>

A red warning message is displayed below the TPP Period End Date field: **\*\* Please confirm the date you have entered as there should be 5 years between the Agenda for Change Preservation dates at the start and end of the protection period.**

At the bottom of the form, there are 'Submit' and 'Cancel' buttons.

Where benefits are already in payment; a transfer has been made or the member has died; benefits will be recalculated as mentioned on the previous page.

Once the data has been accepted for submission you will receive a confirmation screen as shown on the previous page.