

A decorative horizontal bar at the top of the page, featuring a blue background with a green gradient on the left side.

NHS Pensions Online (POL) Guide

38. Check Member Choice Status

The screenshot shows the NHS Pensions Agency website interface. At the top, it says 'Welcome to the NHS Pension Scheme ONLINE' and 'Welcome'. The NHS Pensions Agency logo is in the top right. Below the header, there are navigation links: 'EA - 5812', 'Back', 'Print', 'Employer Menu', and 'E-Forms'. A left-hand menu contains 'Exit Online Services', 'Member search', and 'Site Update'. The main content area displays a welcome message and a list of links under the heading 'Please select an area of the site you would like to visit'. The links are: E-FORMS, MEMBERZONE, NOTIFICATIONS, NOTICE BOARD, ERROR HANDLING, ESR STATUS, CHANGE PASSWORD, VIEW EMPLOYER CONTACTS, VIEW PENSION CONTACTS, CHECK MEMBER CHOICE STATUS, and CHANGE FACODE. An arrow points to the 'CHECK MEMBER CHOICE STATUS' link. Below the links, there is a disclaimer box: '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.'

The link to check members Choice Status is located on the main employer menu.

The Choice Status will show the stage the member is at within the Choice process.
The message will be one of the following:

- Member has chosen not to participate in Choice
- Member selected for statement production
- Member statement calculations complete
- Member is currently not eligible for a Choice
- Member statement ready for printing
- Member statement ready for dispatch
- Member statement returned or not delivered
- Member Choice disregarded – AW8 not received in time
- Member left during disclosure period
- Member left during statement production
- Member no longer excluded
- Member needs new statement
- Member has chosen to remain in 1995 scheme
- Member has chosen to move to 2008 scheme
- Member remains in 1995 scheme
- Member choice of 2008 scheme enacted
- No Choice record found

Important – You should use the new functionality to check the members Choice status before processing an estimate of benefits through Memberzone.

Memberzone **must not** be used to calculate any estimates of pension benefits for any member with a Choice Status of 'Member has chosen to move to 2008 Section'.

In these circumstances you should send the request to The NHSBSA for calculation 'marked 2008 Choice transferee'.

You should also use the new functionality to check the members' Choice status before processing an AW8 form through Pension Online.

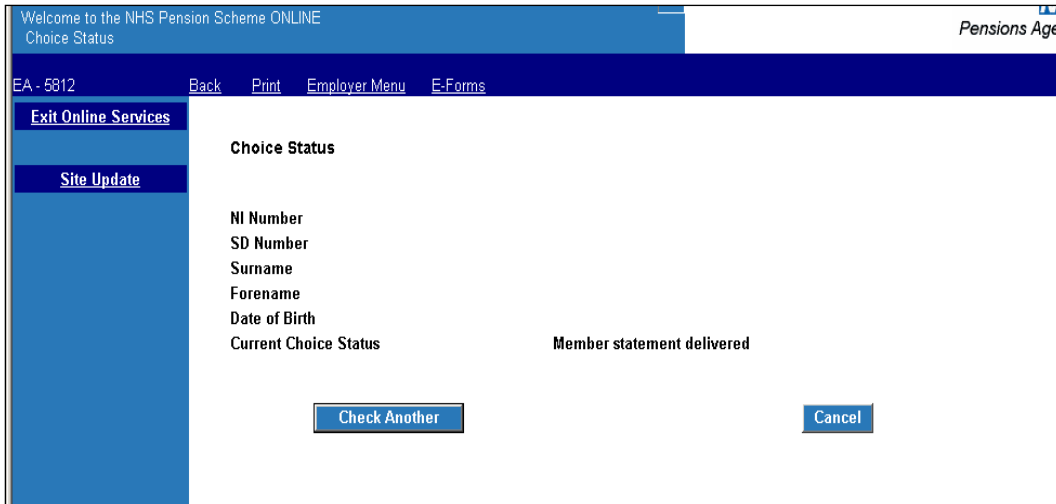
Pension Online **should not** be used to submit an AW8 for any member with a Choice Status of 'Member has chosen to move to 2008 Section'. In these cases send the AW8 form to The NHSBSA marked '2008 Section member'.

Once the link is selected you will be asked to input either their SD reference number or National Insurance Number.

The screenshot shows a web interface for checking member choice status. The page title is 'Welcome to the NHS Pension Scheme ONLINE' with a sub-header 'Choice Status'. The NHSBSA logo and 'Pensions Agency' are in the top right. A navigation bar includes 'EA - 5812', 'Back', 'Print', 'Employer Menu', and 'E-Forms'. A sidebar on the left has 'Exit Online Services' and 'Site Update'. The main form area is titled 'Choice Status' and contains two input fields: 'NI Number' and 'SD Number'. At the bottom of the form are 'Submit' and 'Cancel' buttons.

You will only be able to view the status for members who are currently in an open employment with you.

Once a valid reference number has been entered the members' Choice status will be displayed:



On the above example the members choice statement has been delivered.

If you wish to check the status for another member select “Check Another” and you will be asked to input the SD or NI number.

If status is ‘no Choice record found’ the member has either not been selected for the Choice Exercise or has been selected but there is a data error outstanding.

On the example below the member did not commence pensionable employment in the NHS until after 01.04.2008 and “Choice” is not therefore relevant.

