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Special Class Status

Special Class and GP practices

- GP Practice staff were allowed to join the NHS Pension Scheme on the 1 September 1997
- In circumstances where a break in membership occurred prior to 1 September 1997 due to employment with a GP Practice, NHS Pensions will ignore the period from 6 March 1995 to 31 August 1997 when determining eligibility for retention of special class
- Members must be in a special class role on 6 March 1995 for retention to be considered

Male Nurses and Special Class

Special Class status for male members does not apply to service prior to 17 May 1990. For pension benefits prior to 17 May 1990 the member can choose to either:

- Take the pre 17 May 1990 benefits at age 55, which would be actuarially reduced to take into account them being paid early

Or

- Defer the pre 17 May 1990 benefits until age 60

This should be clearly indicated on completion of benefits application forms AW8/AW8P

Transitional Special Class members

A transitional 1995/2015 member may:

- Retain Special Class status in respect of their 1995 Section benefits only
- Claim the 1995 Section pension in full from age 55 and be eligible for final salary link so long as they spent the last five years of pensionable employment (leading up to retirement) in Special Class and did not have a break in pensionable employment exceeding five years
- Claim the 2008/2015 scheme benefits at the same time, subject to reduction or defer their 2015 scheme benefits until they reach NPA
- Members with special class status claiming benefits from the 1995 section cannot re-join the 2015 scheme

Eligibility to Special Class following a break

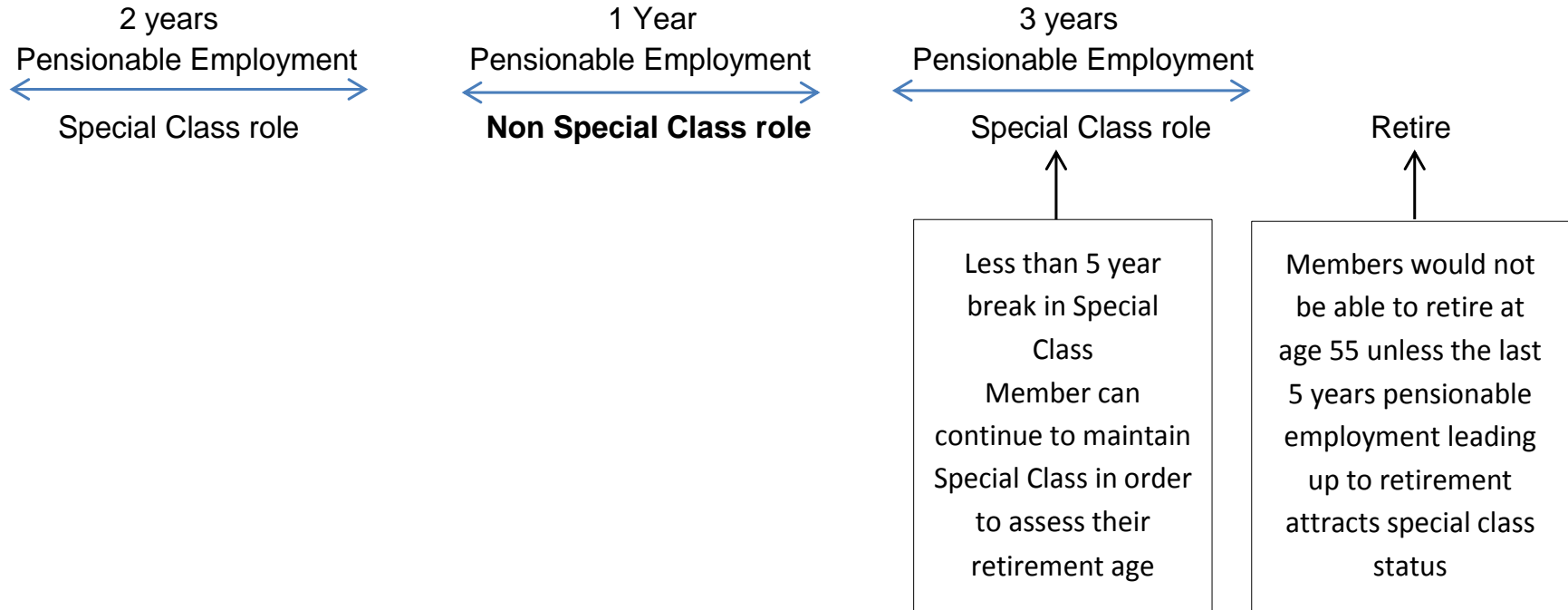
Members in pensionable employment on 6 March 1995

- Members can maintain special class status providing they do not incur a break of 5 years or more in **pensionable employment**
- A break in pensionable employment is not the same as a break in Special Class Status

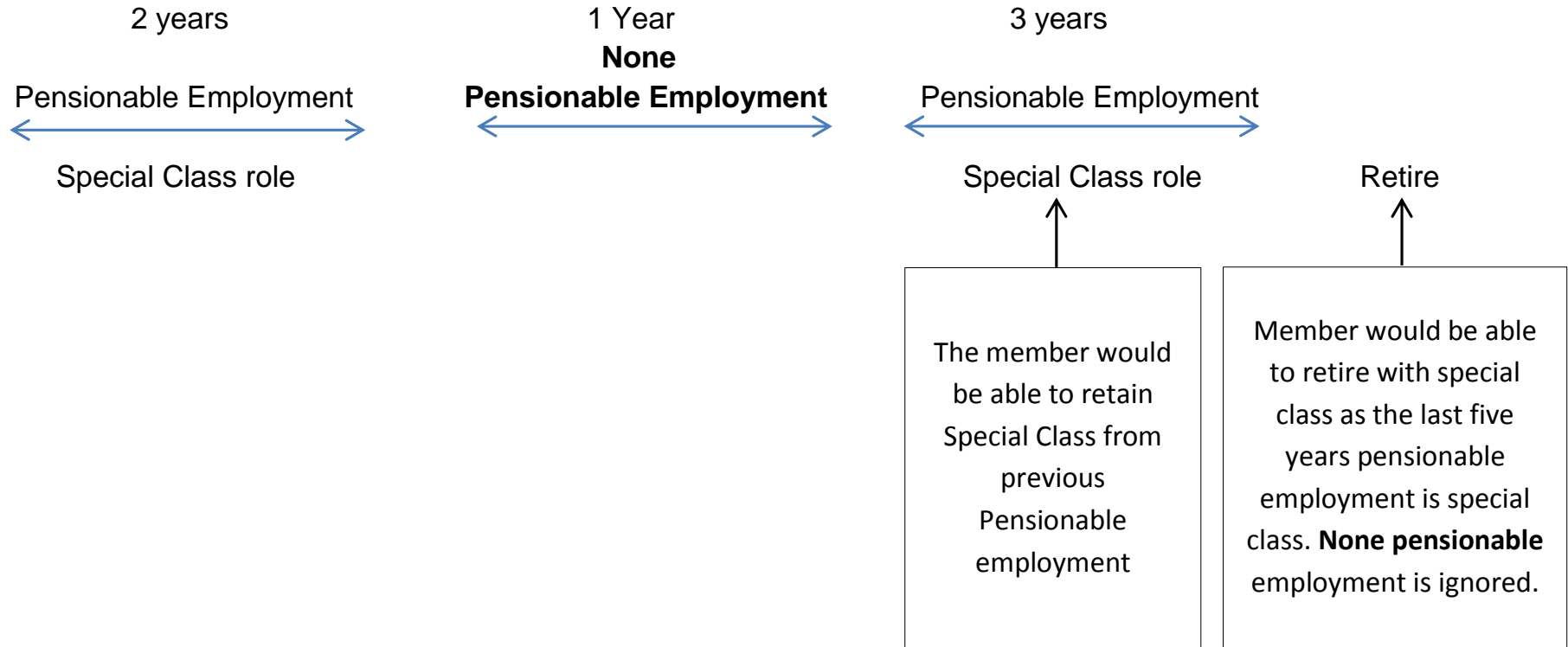
Therefore members may have a break from a special class role for more than 5 years, but as long as they have not had a break in pensionable employment of any one period of 5 years or more, special class may be maintained if they later moved back to a special class role.

- Members who have had a break of 5 years or more in pensionable employment will lose the right to retain special class status

What does this mean?



What does this mean?



Eligibility to Special Class following a break cont...

- Deferred members who held special class on 6 March 1995, may qualify for special class status on re-joining 1995 section in a role which attracts the status. Previous members returning to pensionable employment following a break of five years or more will not be eligible for special class.
- If the member had transferred benefits out of the Scheme, received a refund or retired as a special class member prior to 6 March 1995 then they are not eligible for the status on returning to NHS pensionable employment
- Special class status does not apply to membership in the 2008 section or 2015 scheme

Retaining Special Class Status

If you are unsure whether a post attracts special class status you should contact NHS Pensions providing a copy of the members specific job description and any other information that is relevant to the post.

- NHS pensions has the right to investigate and consider retention for potentially eligible special class posts and make the final decision
- Members moving to a Senior Nurse Management post must continue to hold a nursing qualification that is essential for that role
- A member must have held special class status in the post directly before the post they wish to retain the status
- If a member does not hold special class for previous post (s) retention of special class will be rejected unless further supporting evidence can be submitted

Retention of Special Class Status

Nursing Grades

- We will automatically apply special class status when we receive the joiner form if a member is eligible and fulfils the criteria. No further action required

Nurse manager grades

- If the employment immediately prior to the current post is eligible for special class and retention is applicable, submit the joiner form showing capacity 01 instead of 04 for a nurse manager post. No further action is then required

Applying for retention of Special Class Status

- You should continue to record capacity 04 on the joiner form if special class status is not confirmed or known in the previous employment or you are unsure whether special class applies
- Please contact us to check whether the status was previously held in the employment immediately prior to the period being queried
- Complete and send SMR form to enable us to consider retention of special class status
- Applications for retention of special class status will not be excepted without a complete SMR form.
- Separate forms will be required for any successive change in job role

Retirement

Members may retire at age 55 providing:

- They have special class status at retirement and have spent the whole of the last 5 years of **pensionable employment** leading up to retirement as a special class member
- If they leave pensionable employment before age 55 and do not return benefits will become deferred and the normal retirement age will be 60

Retirement – Bank Staff

- Special Class (SC) status is applicable for all **eligible** members regardless of the number of hours worked
- For pension purposes, nurse bank employment must be terminated on the last day of active (pensioned) employment
- Retirement from age 55 as a SC member is only possible where SC status was held in active employment immediately prior to retirement

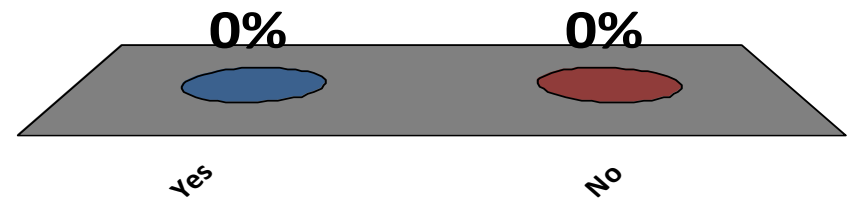
Bank employment				
	Last day 'on the bank	Last pensioned day	Age 55	Retirement as SC member?
Member A	30/01/2018	30/01/2018	31/01/2018	Yes
Member B	30/01/2018	29/01/2018	31/01/2018	No – normal retirement age is 60

Quiz time

If the member has two posts and one is Special Class
can they retire at age 55?

A. Yes

B. No



Answer A Yes

- If a member holds two posts and only one is Special Class Status they can still retire (from both posts) at age 55 subject to them holding the Special Class role for the last 5 years of pensionable employment prior to their retirement date up to and including the day before their 55th birthday

Is a break in pensionable employment the same as a break in Special Class?

A. Yes

B. No

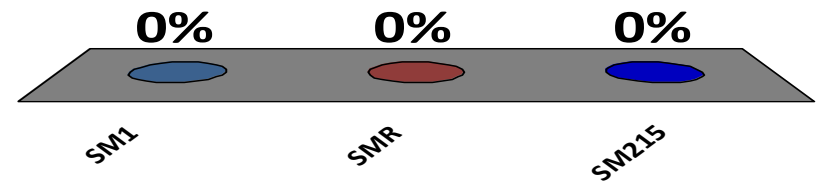


Answer B. No

- A break in Pensionable employment is when the member is not in the Pension Scheme (not contributing) or Non Pensionable employment
- A break in Special Class is where the member moves to a role where Special Class status is not applicable but they are still in the pension scheme

What is the name of the form you need to complete for retention of Special Class?

- A. SM1
- B. SMR
- C. SM215

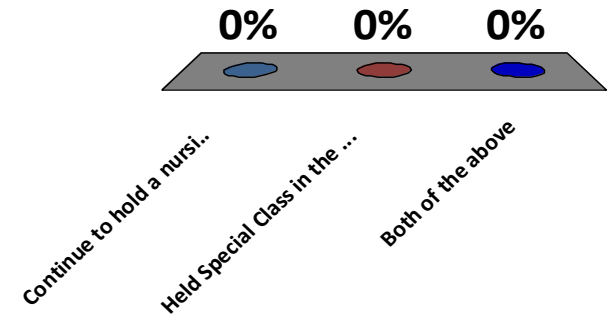


Answer B. SMR Form

- SMR form is used for retention of Special Class
- SM1 is used for MHO Status (non automatic grades)
- SM215 is used for the request for MHO Status for Clinical Psychologists

To retain Special Class as a nurse manager, what would the member would need to?

- A. Continue to hold a nursing qualification which is essential to the role
- B. Held Special Class in the post directly before the post they wish to retain it in
- C. Both of the above



Answer C. Both of the above

- Continue to hold a nursing qualification which is essential to the role and is stated in the person specification of that role
- Held Special Class in the post directly before the post they wish to retain it in

If a member held Special Class from 1989 -2001, then held a non Special Class post from 2003-2012, then moves to a Special Class role in 2013.

Is the member eligible for Special Class in the most recent post?

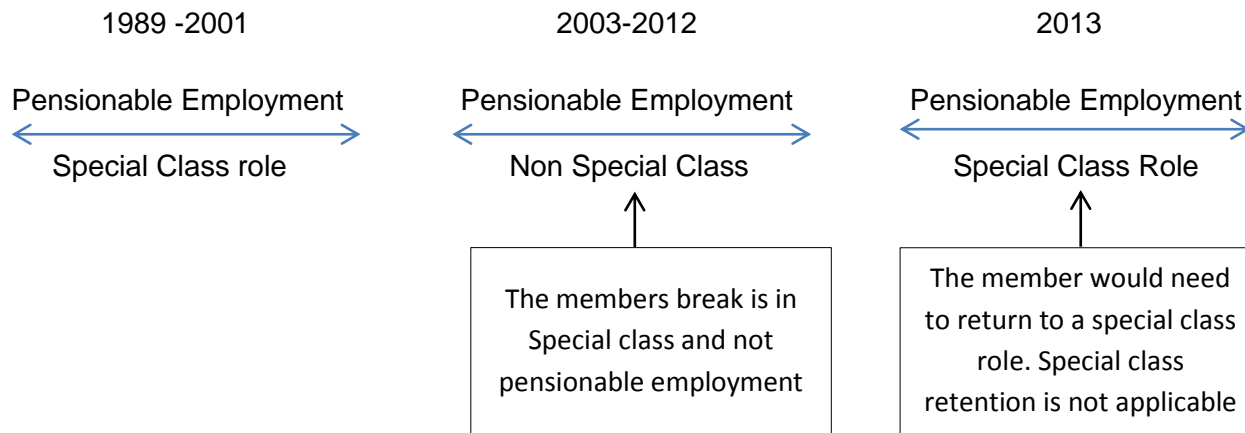
A. Yes

B. No



Answer A Yes

- As the member has not had a break in **pensionable employment** of more than 5 years, the member is eligible to continue to maintain Special Class.



If a member held Special Class from 1989 -2001, then held a non Special Class post from 2003-2012, then moves to a Special Class role in 2013 and retires in 2015.

Is the member eligible to retire with Special Class?

A. Yes

B. No



Answer B No

- As the member last 5 years of pensionable employment was not in a **special class role** the member is not entitled to retire at 55 as Special class.