

Changes to financial information excel spreadsheet employer guidance (SD55E)

Changes information can only be submitted using this spreadsheet if your organisation doesn't have access to Pensions Online (POL) or Electronic Staff Records (ESR).

If you are unsure of your POL status or need help registering or resetting passwords, please contact the POL Helpdesk at:
nhsbsa.polhd@nhs.net

To successfully amend your members financial data, please follow this guidance carefully. Failure to provide the correct information in the correct format will mean that we cannot make changes to our records and the spreadsheet will be returned to you.

All completed spreadsheets should only be emailed to nhsbsa.directionbodies@nhs.net. Sending your spreadsheet to other or multiple email accounts will delay the processing of your data.

Use this spreadsheet to notify us of any changes to the following:

- Last day of membership
- Employee contributions or their percentage rate
- Employee pay
- Employer contributions
- Employer pay
- Gross Pay
- Disallowed days
- Arrears of contributions
- Midyear contribution rate change

Once the information has been completed it should be submitted by email to: nhsbsa.directionbodies@nhs.net

If there have been any changes to the employment that have not been included on previous annual update, please e-mail nhsbsa.directionbodies@nhs.net advising them of the change. As this spreadsheet should only be used to amend the financial information or leaver details once the record has been updated.

Any changes to employment information can only be actioned where the record has been updated to the current financial year and any changes made following the annual update date should be included on the year end spreadsheet, for the year that the change occurred.

Any changes to the employment can only be reported if the member is changing from whole time to part time or part time to whole. Changes to actual contracted hours are not reported on the member's record, as this change is reflected in the total number of hours worked during the period.

The other change that can occur to the employment is a change of capacity code for all members except members that are employed as a capacity codes 03,08 and 10. To include a change for this member type, the record needs to be closed down on the day before the change occurred and a new joiner form submitted with the date of the change of contract as the date of commencement.

For any change to the member's personal information, for example their name, national insurance number, date of birth or address, please complete the SD55G and send it to nhsbsa.directionbodies@nhs.net

| Column heading | Column title | Max length | Format | Comments |
|----------------|----------------------------------|------------|---------------|--|
| A | Surname | 24 | Alpha | As shown on NHS Pension Records, if different please complete SD55G form. |
| B | Forename | 24 | Alpha | As shown on NHS Pension Records, if different please complete SD55G form. |
| C | Member number | 8 | Numeric | |
| D | Emp ID | 2 | Numeric | Employment identifier held on NHS Pensions Record. |
| E | Employer/Pay reference | 20 | Alpha/Numeric | |
| F | Date of commencement | 8 | DDMMYYYY | Date member commenced the pensionable employment for which you are providing amendments |
| G | Year to be amended | 4 | Numeric | The scheme year for which the information needs amending, for example, 31 May 2020 falls in the 2021 scheme year |
| H | Revised last day of membership | 8 | DDMMYYYY | New date employment ended, if previously incorrect, or has changed since employment closed. |
| I | Revised employee contributions | | Numeric | Revised contributions, if previously incorrect, or have changed since employment closed. |
| J | Revised employee pensionable pay | | Numeric | Revised pensionable pay, if previously incorrect, or has changed since employment closed. |
| K | Revised percentage rate | | Numeric | Revised percentage rate of employee contributions, if previously incorrect, including mid year contribution rate change. |
| L | Revised employer contributions | | Numeric | Revised employer contributions, if previously incorrect, or have changed since employment closed. |

| Column heading | Column title | Max length | Format | Comments |
|----------------|---|------------|--------------------------------------|---|
| M | Revised employer pensionable pay | | Numeric | Revised employer pensionable pay, if previously incorrect or has changed since employment closed. |
| N | Revised employer gross pay | | Numeric | Revised gross pay, if previously incorrect or has changed since employment closed. |
| O | Number of disallowed days | | Numeric | Total number of days the member was in non-pensionable employment and received no pay, due to unpaid leave, unpaid sick, or strike days. If multiple periods of disallowed days during the year, please use multiple lines. |
| P | Disallowed days Start date | 8 | DDMMYYYY | Start date of period of non-pensionable days during the year. |
| Q | Disallowed days End Date | 8 | DDMMYYYY | End date of period of non-pensionable days during the year. |
| R | Revised hours | 4 | Numeric | Changes in the total number of hours actually worked if previously incorrect or have changed since employment closed. |
| S | Arrears amount | 8 | Numeric to two decimal places | Include any outstanding contributions that have not been paid. |
| T | Arrears start date | | DDMMYYYY | The date the arrears started to accrue. |
| U | Arrears end date | | DDMMYYYY | The date accrual of arrears ended. |
| V to AE | These columns enable you to show any changes to tiered contribution rates during the year | | Numeric with percentage sign | Full guidance on the contribution rate is available on our website. |
| V | Period from | | DDMMYYYY | This should be the start of the current scheme year. Or the date the employment commenced, if after the start of the current scheme year |
| W | Period to | | DDMMYYYY | This is the date prior to the change of contribution rate. |
| X | Contribution rate prior to change | | | This is the rate at the start of the scheme year. |

| Column heading | Column title | Max length | Format | Comments |
|----------------|---|------------|---------------|--|
| Y | Employee contributions up to date of change | | Numeric | This is the amount of contributions paid by the member prior to the change of rate. |
| Z | Employee pay up to change | | Numeric | This is the amount of pay the member paid contributions on during the period. |
| AA | Period from | | DDMMYYYY | This is date of the contribution rate at the start of the period example 01042020. Or the date the employment commenced, if after the start of the current scheme year |
| AB | Period to | | DDMMYYYY | This is the date of the contribution rate at the end of the period example 31052020. |
| AC | New contribution rate | | Numeric | This is the new rate (normally at the end of the current scheme year unless there have been multiple changes). |
| AD | Employee contributions following change | | Numeric | This is the amount of contributions paid by the member following the change of rate. |
| AE | Employee pay following change | | Numeric | This is the amount of pay the member paid contributions on during the period following the change of rate. |
| AF | Comments | | Alpha/Numeric | If you want to provide any further relevant information. |