



# NHS Pensions Online (POL) Guide

## 1. What is Pensions Online?

Pensions Online is a facility available to National Health Service Business Services Authority (NHSBSA) employers, General Practitioner (GP) Practices and some Direction employers who have access to the NHS Net (or Welsh VPN). It allows access to the following NHSBSA Pensions functionality for members of the NHSBSA Pension Scheme:

- Create new pensionable employments via Electronic (E)-Forms
- Electronic submission of contributions and pay details via E-Forms
- Electronic amendment of contribution and pay details via E-Forms
- Calculation of estimates of benefits via Memberzone
- Calculation of cost to purchase Additional Membership via Memberzone
- View membership history for your current members via Memberzone
- Submission of application forms to claim retirement benefits via E-Forms
- Submission of application forms to claim refunds of contributions via E-Forms
- View a list of your current Scheme members – via E-Forms
- View details of where your members records are updated to – via E-Forms
- Resolve errors that have been created on member updating forms – via Error Handling
- Amend personal details for your Scheme members, i.e. surname, address – via EForms SD55G.

If you do not have access to the NHS Net or Welsh VPN then you will not be able to access any of the above.

### **Did you know that you can:**

- Use the SD55E E-Form to check the contribution and pay details that you have submitted for an employment that has been closed.
- Use the ADP4 in E-Forms to view a list of your current members to check if this is correct or any leaver forms are outstanding.
- Use the ADP4 to check if a joiner form for a new member has processed and obtain their membership (SD) number.
- Check the date to which your current members records have been updated, also via the ADP4 or Non-Updated Records.

### **Did you know that you cannot:**

- Make changes to pensionable employment start dates.
- Change the reason for termination code.
- Use a temporary National Insurance number when submitting a new joiner form. Leave this field empty and a 'ZZ' National Insurance number will be allocated by NHSBSA Pensions.

Not entirely accurate, can Rewind and redo Not relevant to POL **Additional information**

- If you have submitted a form that has not processed successfully within 24 hours this means that an error has been produced and you should check 'Error Handling'. If there is no error allocated to the Employer but it is allocated to NHS Pensions then this means that the error is a type needed to be resolved by NHSBSA Pensions and you can email them at [datamanagement@nhsbsa.nhs.uk](mailto:datamanagement@nhsbsa.nhs.uk) to investigate.
- From 1 October 2011 any amendments that can be carried out via Pensions Online will be returned to the originator for completion with a brief explanation of the correct action to take. It is important to us that employers registered to use Pensions Online make full use of the Pensions Online tools we have made available.
- If you have any suggestions for improvements to Pensions Online tools we are happy to give them our full consideration.
- The Pensions Online Helpline number is 0870 011 7108 (POL queries only)
- The Employers Helpline number is 0300 3301 353
- The NHS Net Support Team number is 01392 251289 (NHS Net queries only)

### When contacting NHSBSA Pensions by email please state the following details:

- Membership (SD) number
- Member's surname
- Your EA code
- The date of commencement of the employment
- Payroll /Electronic Staff Record (ESR) reference number

**Important note:** For security reasons do not include the member's National Insurance number or address in an email.

If you already have access to the NHS Net or Welsh VPN then you can use Pensions Online by logging on to our website.

You have access to the NHSBSA Pension's website which includes a link to Pensions Online via the **Employer Hub – Pensions Online** page.

## Pensions Online

Pensions Online (POL) is an online tool based on the internal NHS Network (N3) which gives employers the facility to update and amend member's records.



### Pensions Online downtime

Please note that at times we may need to take Pensions Online (POL) offline at short notice. Updates will be provided on our website when possible. We apologise for any inconvenience this may cause.

### Pensions Online estimate calendar length service more than 40 years

You will need to refer any cases to NHS Pensions, where an estimate has been processed on Pensions Online and the calendar length service exceeds 40 years and above. Please email the member's name and membership (SD) number to [nhsbsa.pensionsemployers@nhs.net](mailto:nhsbsa.pensionsemployers@nhs.net) with the heading Maximum service. It is important that you do not issue the estimate to the member until NHS Pensions has confirmed that it is ok to do so.

Appendix to be included with all estimate requests where the member exceeds £250,000 after lump sum commutation.

### Pensions Online administration guides

- 01. What is Pensions Online
- 02. Frequently Asked Questions
- 03. Registration Process
- 04. Signing in
- 05. Member search
- 06. Site update
- 07. Administer employer access
- 08. E-Forms view
- 09. Automated forms view

### Joiners

[Transferring into the Scheme](#)

[Increasing benefits](#)

[Membership, contributions and pay](#)

[Options on leaving the Scheme](#)

[Retirement](#)

[Family benefits and life assurance](#)

[Divorce or dissolution of a civil partnership](#)

[Tax information](#)

[Factors](#)

[Electronic Staff Record \(ESR\)](#)

[Pensions Online](#)

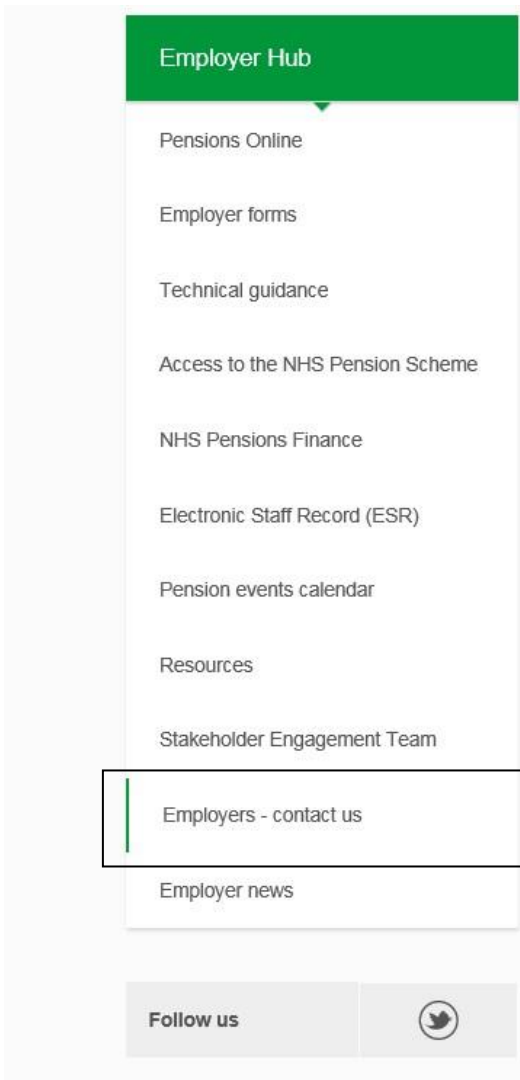
[Contact us](#)



**Log in to Pensions Online**



Selecting the page **Employer Hub – Contact us** takes you to NHSBSA Pensions contact details page that holds further links to contact NHS Pensions, Pensions Online (POL) helpdesk, Equinity Paymaster, NHSBSA Pensions Scheme Finance and order forms.



By selecting the **Log in to Pensions Online** link you are then taken to the Pensions Online log in screen:

- [Exit Online Services](#)
- [PC Requirements](#)
- [Site Update](#)

POL (Pensions Online) is an online tool based on the internal NHS Network (N3) which gives employers the facility to update and amend member's records.

Please check for any newly posted messages below before accessing POL.

All messages will be reviewed regularly and removed when no longer required.

**IMPORTANT INFORMATION PLEASE READ**

Date posted:	March 2018
Subject:	TRS Annual Refresh
Message:	The Pensions data cut for the TRS annual refresh will take place after 7pm on Friday 22nd June 2018 in order to commence the refresh process to have statements ready for view at the end of August 2018.
Date posted:	March 2018
Subject:	Important HMRC changes for providing certificates of protection from lifetime allowance charges
Message:	HMRC have amended their processes for providing certificates of protection from lifetime allowance charges, this change has lengthened the certificate number from 8 to 15 digits which will no longer fit in the appropriate field. Until updates can be made will you please enter the last 7 numeric digits from the member's reference number e.g. HMRC confirm the "reference number is IP1412345678901Z" so enter 5678901Z. A copy of the confirmation from HMRC <b>Must</b> be sent to NHS Pensions. This will ensure NHS Pensions has the correct information to be able to calculate the members benefits. Thank You.

Please select one of the following options:

- Employers:
- > [Register](#)
  - > [Sign In](#)
  - > [Frequently Asked Questions](#)

This page also includes links to the following:

**Please select one of the following options:**

**Employers:**

- > [Register](#)
- > [Sign In](#)
- > [Frequently Asked Questions](#)