

NHS Pensions - Application for previous public service membership to qualify in the 1995/2008 NHS Pension Scheme

The public service pensions remedy, also known as McCloud, is designed to put right the decision by the Court of Appeal which found that some changes made to public service pension schemes in 2015 discriminated against younger members based on age. Some members who joined the NHS Pension Scheme for the first time, or returned after a break of more than 5 years, from 1 April 2012 may qualify for membership in the 1995/2008 Scheme and therefore be eligible for the public service pensions remedy if they have previous membership of another public service sector pension scheme. More information about this can be found at www.nhsbsa.nhs.uk/public-service-pensions-remedy-mccloud/public-services-pension-remedy-mccloud-remedy

Use this form to notify us, NHS Pensions, of your previous membership of another public service pension scheme so that we can determine whether you are eligible for the public service pensions remedy. You should only complete this form if you have not previously submitted a PPSM1 form and have not transferred in service from the other public service pension scheme.

If you have pensionable service in a previous public service pension scheme, other than the NHS Pension Scheme (England and Wales), you should complete Parts A, B and C of this form.

You then need to send it to your previous public service pension scheme administrator who will complete Parts D and E before returning the form to you. If they are unable to complete parts D and E you must provide supporting evidence to show you have pensionable membership in your previous scheme.

When the form is complete send it to us by email to McCloudPPSM@nhsbsa.nhs.uk or by post to NHS Pensions, PO Box 683, Unit 5, Newcastle Upon Tyne, NE5 9EE.

How we use your information

For more information about how the NHSBSA processes your personal data, see our privacy notice - www.nhsbsa.nhs.uk/our-policies/privacy/nhs-pensions-privacy-notice

Part A: To be completed by member – About you and your NHS job immediately after 31 March 2012

Title	Address
<input type="text"/>	<input type="text"/>
Surname	
<input type="text"/>	
Other names	
<input type="text"/>	
Membership number	
<input type="text"/>	
Date of birth	Email address
<input type="text"/> <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>
National Insurance number	Start date in NHS after 31 March 2012
<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Part B: To be completed by member – About your previous public service pension scheme membership

Please tell us about your pensionable employment with your previous public service pension scheme membership that was immediately before the start date in the NHS in Part A.

(a) Name of public service pension scheme	<input type="text"/>
(b) Employer while a member of this scheme	<input type="text"/>
(c) Start date of previous scheme membership	<input type="text"/> <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
End date of previous scheme membership	<input type="text"/> <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
(d) Previous Scheme Membership number (if known)	<input type="text"/>
(e) Have you received a refund for this period of membership?	<input type="checkbox"/> Yes <input type="checkbox"/> No
(f) Have you transferred the benefits to another pension provider?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If 'Yes' give the name of the scheme the benefits were transferred to	
<input type="text"/>	
Date of transfer	<input type="text"/> <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
(g) Were you receiving a pension for the period of membership at (c) on the first day you joined, or re-joined, the NHS Pension Scheme following this period?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If 'Yes' confirm the date you started to receive your pension	<input type="text"/> <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Part C: To be completed by member – Declaration

I declare that the information I have provided is correct.

Signed by member

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Date

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Important

Read the important information page before sending this form to your previous public service pension scheme administrator for verification of Part B and completion of Parts D and E.

You should keep the Important Information page until the scheme administrator has returned this form back to you.

Only return the form to us, NHS Pensions, if your previous public service pension scheme administrator has ticked 'Yes' to question 1 in Section D.

If they have ticked 'No' to question 1 in Section D then you are not affected by the change to public service pension schemes and there will be no further action for you to take.

Part D: To be completed by the public service pension scheme administrator in relation to the - previous public service pension scheme membership before joining the NHS Pension Scheme

The person named in Part A has sent you this form because they are asking for their membership to be considered as remediable service under the Public Service Pensions and Judicial Offices Act 2022. Please verify the information in Part B and make any corrections in Part D before completing the declaration in Part E.

Return this form to the member. **Do not send this form to NHS Pensions.**

1. We confirm that on or before 31 March 2012 the person was a member of the public service pension scheme confirmed in Part E. ☐ Yes ☐ No

If 'Yes' go straight to Q.2. If 'No' complete Part E

2. We confirm that all the information given in Part B is correct. ☐ Yes ☐ No

If 'Yes' complete Part E. If 'No' go straight to Q.3.

3. We confirm that information given in Part B is incorrect and is amended as follows:

(an entry is only necessary where Part B has been completed incorrectly)

(a) Name of Public Service Pension Scheme

(b) Start date of previous scheme membership

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End date of previous scheme membership

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- (c) Member received a refund for their period of membership? ☐ Yes ☐ No

- (d) Member transferred their benefits to another pension provider? ☐ Yes ☐ No

If 'Yes' give the name of the scheme the benefits were transferred to

Date of transfer

		/			/				
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- (e) Member is receiving a pension from the public service pension scheme confirmed in Part E. ☐ Yes ☐ No

If 'Yes' please confirm the date they started to receive this pension

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Part E: To be completed by the public service pension scheme administrator – Declaration

I certify that the information provided in Part D of this form is correct and may be used by NHS Pensions to determine whether the person named in Part A qualifies for remediable service under the Public Service Pensions and Judicial Offices Act 2022.

Name of public service pension scheme

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Address of administrator / sub administrator

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Signed by administrator / sub administrator

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Name (please print)

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Position

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Contact email address

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Date signed

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Important Information

You should complete the application to be considered for membership in the 1995/2008 NHS Pension Scheme if after 31 March 2012 you:

- joined the NHS Pension Scheme for the first time or rejoined following a break of 5 years or more, and
- had previous pensionable membership with an eligible public service pension scheme in the five years leading up to your NHS Pension Scheme membership.

You should ignore the rest of this letter unless you were in pensionable membership with one of the following eligible UK public service pension schemes:

- NHS Pension Scheme (Scotland and Northern Ireland only)
- Local Government Pension Scheme
- Teachers' Pension Scheme
- Civil Service Pension Scheme
- Armed Forces Pension Scheme
- Fire and Rescue Workers' Pension Scheme
- Police Forces' Pension Scheme
- Judicial Pension Scheme

If your previous public service membership was with NHS Pensions (England and Wales) and you rejoined following a break of less than 5 years then your eligibility has already been assessed and you do not need to complete this form.

Only complete the form if your previous membership was in one of the eligible UK public service pension schemes listed above and at least one of the following applies:

- you have not had a break of more than 5 years between leaving your previous public service pension scheme and joining the NHS Pension Scheme
- you have not previously submitted a PPSM1 (Previous Public Service Membership) form
- were not receiving a pension from your previous public service pension scheme on the day you joined or rejoined the NHS Pension Scheme
- you did not receive a refund of contributions from your previous public service pension scheme
- you have not transferred out your previous public service pension benefits to a registered pension scheme that is not a public service pension scheme, have transferred out your previous public service pension benefits to another public service pension scheme, not including the NHS Pension Scheme (England and Wales)

Part A

Provide all the information requested.

Part B

Answer each question.

If you have ticked 'Yes' to (e) or (g) in Part B and the date you received your refund or started to receive your pension from your previous public service pension scheme was before you joined or rejoined the NHS Pension Scheme shown in Part A then you do not qualify for the public service pensions remedy with the NHS Pension Scheme (England and Wales) and you have been assigned to the right NHS Pension Scheme. Your previous public service pension scheme may contact you if you qualify for the public service pensions remedy with their scheme. **You do not need to send the form to your previous public service pension scheme administrator or NHS Pensions.**

If you have ticked 'Yes' to (f) in Part B and the pension scheme or arrangement you have transferred your previous public service pension scheme benefits to is not an eligible public service pension scheme (see list on previous page) then you do not qualify for the public service pensions remedy with the NHS Pension Scheme (England and Wales) and you have been assigned to the right NHS Pension Scheme. Your previous public service pension scheme may contact you if you qualify for the public service pensions remedy with their scheme. **You do not need to send the form to your previous public service pension scheme administrator or NHS Pensions.**

If you have transferred your previous public service pension scheme benefits into the NHS Pension Scheme (England and Wales) we have already determined whether you qualify for the public service pensions remedy and membership in the 1995/2008 Scheme. **You do not need to send the form to your previous public service pension scheme administrator or NHS Pensions.**

Send the form, including Parts A, B and C, to your previous public service pension scheme administrator and ask them to verify the information you have provided in Part B by completing Parts D and E. Ask them to return the completed form to you. They should not send this form to NHS Pensions.

Part C

Sign and date the declaration.

Part D

Ensure your previous public service pension scheme administrator has answered questions 1 and 2 in Part D and, where required, provided answers to question 3.

If your previous public service pension scheme administrator ticked 'Yes' to question 1 at Part D then you should send the form to us by email to McCloudPPSM@nhsbsa.nhs.uk or by post to:

NHS Pensions
PO Box 683
Unit 5
Newcastle Upon Tyne
NE5 9EE

If your previous public service pension scheme administrator has ticked 'No' to question 1 then you do not need to do anything more as you are not affected by the change to public service pension schemes. **You do not need to send the form to NHS Pensions.**

Part E

Ensure that your previous public service pension scheme administrator has signed and dated the declaration.

More Information

You can read more about the changes to public service pension schemes and the remedy at www.nhsbsa.nhs.uk/public-service-pensions-remedy-mccloud