

New Starter Information

New Employee to complete Section 1 and 3 only of the New Starter Questionnaire

SECTION 1 – NEW EMPLOYEE TO COMPLETE

Surname: _____ **First Name(s):** _____
Mr / Mrs / Miss / Ms: _____ **Date of Birth:** _____
Gender: Male / Female **Marital Status:** _____
NI No:

Personal Details

Home Address: _____ **Home Telephone:** _____
 _____ **Work:** _____
 _____ **Mobile:** _____
Postcode: _____ **Email:** _____

Emergency Contact Details (UK Based) *(An emergency contact is the first person medical personnel will get in touch with in an emergency, but your emergency contact may not have the legal authority to act on your behalf unless you explicitly provide that power.)*

Full Name: _____ **Home Telephone:** _____
Relationship: _____ **Mobile:** _____

Next of Kin Details (Can be based UK or Overseas) *(Next of kin is usually defined as a person's closest living blood relative or spouse, someone who may have inheritance rights, and obligations.)*

Full Name: _____ **Relationship:** _____
Country Code: _____ **Country Code:** _____
Home Telephone: _____ **Other Telephone:** _____

Professional Registration

Awarding Body: _____ **Type (i.e. Full, Ltd etc):** _____
Reg No: _____ **Expiry Date:** _____

Salary Payment into Bank / Building Society Account *(All fields in this section are mandatory)*

*** Bank / Building Society Name:** _____ **Branch Name:** _____
Branch Address: _____ **Account Name:** _____
 _____ **Account No:** _____
Postcode: _____ **Sort Code:** - -

This account is with a ***Bank / Building Society** *(*please delete as appropriate)*

Ethnic Origin

Please enter a code from the list below:

- | | | |
|----------------------------|------------------------|-----------------------------------|
| A = White British | F = Mixed Asian | L = Asian Other |
| B = White Irish | G = Mixed Other | M = Black Caribbean |
| C = White Other | H = Indian | N = Black African |
| D = Mixed Caribbean | J = Pakistani | P = Black Other |
| E = Mixed African | K = Bangladeshi | R = Chinese |
| | | S = Any other Ethnic group |

Sexual Orientation: _____ **Religious Belief:** _____

Country of Birth: _____ **Nationality:** _____

Do you consider yourself to have a disability? Yes No

If yes, please give brief details: _____

Name of previous / most recent employer: _____

PAYE New Joiner Declaration*(You need to select only one of the following statements A, B or C— even if you have supplied a P45)*

A	This is my first job since 6 April and I've not been receiving taxable Jobseeker's Allowance, Employment and Support Allowance, taxable Incapacity Benefit, State or Occupational Pension.	Yes / No
B	This is now my only job but since 6 April I've had another job, or received taxable Jobseeker's Allowance, Employment and Support Allowance or taxable Incapacity Benefit. I do not receive a State or Occupational Pension.	Yes / No
C	As well as my new job, I have another job or receive a State or Occupational Pension.	Yes / No

Have you previously served in the Armed Forces? Yes No

If Yes – please circle which Armed Forces you served in Royal Navy / Army / Royal Air Force

Please confirm Rank upon leaving _____

Are you a member of the Reserved Armed Forces? Yes No

If Yes – please circle which Armed Forces you serve in Royal Navy / Army / Royal Air Force

New Employee Signature: _____

Date _____

Student Loan

For more guidance about repaying go to www.gov.uk/repaying-your-student-loan.

1 Do you have one of the Student Loan Plans described below which is not fully repaid?

Yes If Yes, go to question 2

No If No, go to question 5

2 What type of Student Loan do you have?

Plan 1 Plan 2 Both

3 Did you complete or leave studies before 6th April?

Yes If Yes, go to question 4

No If No, go to question 5

Student Loan Plans

You'll have a Plan 1 Student Loan if:

You lived in Scotland or Northern Ireland when you started your course (undergraduate or postgraduate)
You lived in England or Wales and started your undergraduate course before 1 September 2012

You'll have a Plan 2 Student Loan if:

You lived in England or Wales and started your Undergraduate course on or after 1 September 2012
Your loan is a Part Time Maintenance Loan
Your loan is an Advanced Learner Loan
Your loan is a Postgraduate Healthcare Loan

4 Are you repaying your Student Loan directly to the Student Loan Company by Direct Debit?

Yes

No

Postgraduate Loan

For more guidance about funding and repaying go to www.gov.uk/funding-for-postgraduate-study

5 Do you have a Postgraduate Loan which is not fully repaid?

Yes If yes, go to question 6

No If No, go to the Declaration

6 Did you complete or leave your Postgraduate before 6th April?

Yes If Yes, go to question 7

No If No, go to the Declaration

You'll have a Postgraduate Loan if:

You lived in England and started your Postgraduate Master's course on or after 1 August 2016.
You lived in Wales and started your Postgraduate Masters course on or after 1 August 2017
You lived in England or Wales and started your Postgraduate Doctoral course on or after 1 August 2018

7 Are you repaying your Postgraduate Loan direct to the Student Loans Company by Direct Debit?

Yes

No

Signature

Date

Section 1 Completion notes

National Insurance

You pay National Insurance contributions to qualify for certain benefits and the State Pension. You pay mandatory National Insurance if you're 16 or over and are either:

- an employee earning above £184 a week
- self-employed and making a profit of £6,515 or more a year.

You have a National Insurance number to make sure your National Insurance contributions and tax are recorded against your name only.

It's made up of letters and numbers and never changes.

You can find your National Insurance number:

- on your payslip
- on your P60
- on letters about your tax, pension, or benefits

You can [apply](#) for a National Insurance number if you do not have one or find your National Insurance number if you've lost it.

National Insurance contributions relief – Veterans

In April 2021 HMRC introduced a zero rate of employers Class 1 National Insurance contributions on the earnings of a qualifying veteran. Relief is available for any civilian employment. A civilian employment is one that is not part of the armed forces and includes employments with organisations that may have strong links to HM Armed Forces, such as the Ministry of Defence or NATO. Employment with a reserve organisation is not considered as civilian for the purpose of this relief and do not trigger the qualifying period.

Further Information can be found via <https://www.gov.uk/guidance/claim-national-insurance-contributions-relief-for-veterans-as-an-employer>

North West Collaborative Bank

Join the **North West Collaborative Bank today!** This enables you to work bank shifts across multiple Trusts in the North West. Further information about the Collaborative Bank and the Trusts you can work shifts at can be found via this [link](#).

It only takes 2 minutes to download the app. Please select to join **North West Doctors in Training Collaborative Bank** from the Trust list



If you have any questions, please contact the team via nw.collaborativebank@sthk.nhs.uk or 0151 290 4438

SECTION 2 – FOR OFFICE USE ONLY EMPLOYMENT SERVICES INPUT ONTO ESR AND FORWARD TO PAYROLL SERVICES

Assignment Details

Job Reference No: _____

Job Title: _____ Grade: _____

Department / Ward: _____ Site: _____

Salary: £ _____

Contract Hrs per week: _____ Bank Auto Enrolment: Yes No

Medical Staff Only:

Contracted Sessions per week: _____ (P.A) On Call Supplement: _____ %
(Consultant & SAS only)

Banding Supplement: _____ % Other Allowances: _____ %
(NTG 2002 contract) (Please specify)

Contract Details (for office use only)

Contract Type: _____ Fixed Term End Date: _____
(Permanent/ Fixed Term / Bank or Casual / Locum / Honorary)

Start date in Post: _____ NHS Start Date: _____

Prof Reg Verified? D.O.B Verified? Work Permit Verified? Working Time Opt Out?

(please tick all that apply)

Bank Enrolment: Yes No

eSVL Pay point : _____ Supervisor*: _____

Enter this so that staff appear on the correct SVL. MUST be entered for ESR Manager to use Self Service

Comments / Extra Info:

Section Completed By: _____ Date: _____
(Print name)

FORWARD TO PAYROLL SERVICES

SECTION 3 – NEW EMPLOYEE TO COMPLETE

St Helens & Knowsley Teaching Hospitals NHS Trust Pensions Questionnaire

As part of the recruitment process, all new employees, staff transferring in from another NHS employer and existing NHS employees must complete this questionnaire as fully as possible.

The NHS Pension Scheme legislation requires employers to contractually enrol all new eligible employees into the NHS Pension Scheme on commencement of their employment. The Pensions Act 2008 requires those employees who cannot join the NHS Pension Scheme to be automatically enrolled into an alternative pension scheme. In order to ensure that you are correctly enrolled your employer needs to establish your current NHS pension status.

Please note that the information provided will only be used for local and central pensions / payroll administration purposes and determining eligibility criteria.

Please use the completion notes whilst completing the form.

Employer name

Your full name

Previous surname(s)

National Insurance number

Date of Birth / /

Email address

What is Your Job Role / Title

Date new role will start / /

Q 1	Have you ever had employment which is covered by the NHS Pension Scheme (agency work is not applicable)	Yes <input type="checkbox"/> Go to Q 2	No <input type="checkbox"/> Go to Q10
------------	---	---	--

Q 2	Is this an employment that will continue at the same time as your new role?	Yes <input type="checkbox"/> Go to Q4	No <input type="checkbox"/> Go to Q4
------------	---	--	---

Q3	What date did you leave your last employment with the NHS?		Go to Q4
-----------	--	--	----------

Q4	Please indicate contract type of this other employment(s)	Full Time <input type="checkbox"/> Go to Q5	Part time <input type="checkbox"/> Go to Q5	Bank <input type="checkbox"/> Go to Q5	Self employed <input type="checkbox"/> Go to Q5
-----------	---	---	---	--	---

Important: if you change your hours or leave your other employment(s) it is your responsibility to advise the Payroll team as this may affect your eligibility to a pension scheme.

Q5	Please provide the name and contact details of your other employer(s) along with how many hours you are (or were) contracted to work. If necessary please continue on a separate sheet.		
	Name	Contact details	Contracted hours
	Go to Q6		

Q6	When you were previously a member of the NHS Pension Scheme did you claim any retirement pension benefits (other than on redundancy or interest of efficiency grounds)?	Yes <input type="checkbox"/> See Below	No <input type="checkbox"/> Go to Q7
Please Indicate which NHS retirement benefit you are in receipt of <input type="checkbox"/> Ill health <input type="checkbox"/> Retirement (Early or Age) <input type="checkbox"/> Drawdown (partial retirement)			
Please indicate which Section or Scheme you were a member of: <input type="checkbox"/> 1995 Section <input type="checkbox"/> 2008 Section <input type="checkbox"/> 2015 Scheme <input type="checkbox"/> Not Known			

Q7	Have you previously been made redundant from an NHS employment?	Yes <input type="checkbox"/> See Below	No <input type="checkbox"/> Go to Q8
-----------	---	---	---

Date of redundancy

		/			/				
--	--	---	--	--	---	--	--	--	--

Did you take an NHS Pension?

Yes <input type="checkbox"/> See below	No <input type="checkbox"/> See below
---	--

Which NHS Pension Scheme did You take your benefits from?

<input type="checkbox"/> 1995 Section	<input type="checkbox"/> 2008 Section	<input type="checkbox"/> 2015 Scheme	<input type="checkbox"/> Not Known
---------------------------------------	---------------------------------------	--------------------------------------	------------------------------------

Name of NHS employer made redundant from

Q8	Do, or did you, have any NHS Money Purchase Additional Voluntary Contribution (NHS MPAVC) arrangements in place through the NHS Pension Scheme with Equitable Life, Prudential or Standard Life?	Yes <input type="checkbox"/> No <input type="checkbox"/>
-----------	--	--

Please contact your NHS MPAVC provider if you wish to continue to pay your additional contributions. You will need to advise them of your new employer so they can provide details for payroll deductions to continue. (Go to Q9)

Q9	Do you have an Added Years contract, Additional Pension purchase or Early Retirement Reduction Buy Out (ERRBO) in place?	Yes <input type="checkbox"/> See below	No <input type="checkbox"/> See below
-----------	--	---	--

If your answer is 'yes; please provide us with a copy of your contract. Go to Q10

Q10	In your new post will you be applying for Mental Health Officer status (MHO)?	Yes <input type="checkbox"/> See below	No <input type="checkbox"/> See below
------------	---	---	--

If you had previous MHO status please provide the date the role ended

		/			/				
--	--	---	--	--	---	--	--	--	--

If you never held MHO status your new post will not qualify for this status. (Go to Q11)

Q11	Do you have any previous pension rights that you might be interested in transferring in to the NHS Pension Scheme?	Yes <input type="checkbox"/> See below	No <input type="checkbox"/> See below
------------	--	---	--

If your answer is 'Yes', you should download the Transfer In Guide and application pack from our website at: www.nhsbsa.nhs.uk/nhs-pensions. However, it is important to note that this can only be done in the first 12 months of joining the Scheme for members of the 1995 Section, or within the first 12 months of becoming eligible to join the 2008 Section or 2015 Scheme. (Go part 2)

Part 2 Declaration

I confirm I will inform my employer (or Employing Authority) if my employment position with other NHS organisations changes.

Signature _____

Date

--

Please make sure this form is provided by the commencement of your employment to enable the correct assessment of your pension position.

This form should be returned to:

Employer stamp

--

How we use your information

The NHS Business Services Authority – NHS Pensions will use the information provided for administering your NHS Pension Scheme membership and processing payment of your NHS pension benefits. We may share your information to administer and pay your NHS pension, enable us to prevent and detect fraud and mistakes, for debt collection purposes, or as required by law. For more information about who we share your information with and how long we keep your personal data and your rights, please visit the website at www.nhsbsa.nhs.uk/yourinformation

Section 3 Completion notes

These completion notes are provided to assist you in completing the new joiner questionnaire. Please complete the questionnaire as fully as possible so that the correct assessment can be made.

Q1 – This question is to establish if you have any previous NHS Pension Scheme membership at the date of starting this new employment.

Q2 – This is to establish whether you will have any other NHS employments at the same time as your new role.

Q3 – This is to ensure you do not have an overlapping employment.

Q4 – You can only be pensionable in this Scheme up to whole time, therefore it is important that your employer knows how many hours you work in your other employment(s). Please make sure that you keep your employer/payroll informed if the situation changes.

Q5 – If you are continuing to work in another NHS post we need to know who your other NHS employment is with. This is importantly as there are reasons why you may not be eligible for the NHS Pension Scheme in two employments. The name of your other employer may be the same as an employment agency; this does not count as NHS employment.

Q6 – If you are in receipt of any NHS pension benefits then you may not be eligible to rejoin the NHS Pension Scheme. However, by providing the information requested we will be able to make the correct assessment. We ask you to identify which Section or Scheme you were in (1995 Section, 2008 Section or 2015 Scheme) but if you are unsure then please tick the 'Not known'.

Q7 – NHS Service that has been counted in the calculation of a redundancy payment needs to be declared to ensure the correct assessment of your service. If you are in receipt of an NHS Pension as a result of redundancy, this will impact the assessment.

Q8 – If you have Additional Voluntary Contribution (AVC) arrangements with either Equitable Life, Prudential or Standard Life through the NHS Pension Scheme then you need to inform the AVC provider that you are changing employer to ensure continuity can be considered,

Q9 – If you have either Added Years, Additional Pension purchase or Early Retirement Reduction Buy Out (ERRBO) through the NHS Pension Scheme it is essential that you confirm the details and provide a copy of the contract that was provided to you when you commenced the arrangement to ensure continuity of the arrangement.

Q10 – Please note that the Mental Health Officer (MHO) status no longer applies to any post commenced after 6 March 1995. However, if you have previously held a post (in the last five years) that attracted MHO status and you believe the new post also qualifies for MHO status then you need to indicate this by ticking 'Yes' and completing the details of the previous employment.

Q11 – You may be able to transfer other pensions into the NHS Pension Scheme, however it is important to note that this can only be done:

- In the first 12 months of joining the Schema if you are a member of the 1995 Section
- Within the first 12 months of becoming eligible to join the 2008 Section.
- Within the first 12 months of becoming eligible to join the 2015 Scheme.