

Guidance on Estimate of Benefits

In the autumn of 2016 HSC Pension Service will be issuing Annual Benefit Statements (ABS) to all HSC Pension Scheme members. Going forward, ABS will be available for members to view through Member Self Service. The ABS will provide members with information on their benefits accrued up to the end of the previous financial year.

If a member is within 5 years of their Normal Retirement Age (NRA) they can request 1 estimate per year free of charge. If a member has requested more than one estimate in a year they will be charged £30 for each subsequent estimate.

If a member contacts you to request an estimate of benefits, you should check that they are within 5 years of their NRA and if so inform them that they should [complete the Request For A Pension Estimate Form available at the Request an Estimate](#) section of the scheme website [and](#) submit the form to Payroll Shared Services (PSS) at tsr_pensions.ssc@hscni.net

If a member is more than 5 years from their NRA HR should inform the member that they will be receiving an ABS each autumn and direct them to the [Calculators](#) section of the scheme website.

Actions for the Payroll Shared Service Centre (PSSC)

1. On receipt of an estimate of benefits request PSSC should confirm which scheme the employee is a member of.
2. PSSC should complete Form [EST1](#) which is available from the HSC Pension Service website.
3. All relevant pensionable pay details should be included on the form, taking care to check if the employee is a transitional scheme member and details for multiple schemes are required.
4. If the employee has had a part time working pattern from April 2013 the part time hours worked each year should be recorded on the EST1 form.
5. The completed EST1 form should be forwarded to HSC Pension Service via hscpensions@hscni.net

Actions for HSC Pension Service

1. HSC Pension Service will calculate the estimated benefits and inform the member or HR within 20 working days providing there is receipt of all the required information.

In the cases of terminal illness and agreed early retirements, only HR will be informed.

Estimate of Benefits Request



