

## **New Joiner Questionnaire - Process**

The New Joiner Questionnaire (NJQ) captures details from new employees regarding their current status within the HSC Pension Scheme and eligibility for an alternative pension scheme. The information provided enables the employer to ensure the member is registered to the correct scheme (1995, 2008 section or 2015 scheme).

New starts are made aware of the NJQ when they receive the conditional offer letter which is issued by the Recruitment and Selection Shared Service Centre (RSSSC). The NJQ should be completed by the new start and returned to their Human Resources (HR) department – the return address is detailed on the NJQ. It is essential that when RSSSC issues the NJQ they use the link to the questionnaire held on the HSC Pension Scheme website as this form can be periodically updated. It is the employer's responsibility to ensure that they retain a copy of the NJQ, if this is returned, or the Opt Out form (SD502) and each organisation should agree their own internal processes.

The employer must also provide the new start with a copy of, or access to the Scheme Guide at the earliest opportunity. New starts currently receive this information when they receive their conditional offer letter as they are directed to the New Employee Information Leaflet which provides information on the HSC Pension Scheme. It is for each organisation to determine what further information, if any, they send to a new start but if they are sending further information on the Pension scheme it would be good practice to include a link to or copy of the DG3 and PN1 nomination forms.

The completed NJQ should be returned to HR and HR should review the information provided by the new start, and if necessary the completed form should be sent to the Payroll Shared Service Centre (PSSC). Please note the NJQ states that if the completed form is not returned by the new start, they will automatically be opted into the 2015 HSC Pension Scheme.

If the **new start answers yes to questions 1,2,3,4,6 or 8** then PSSC need a copy of the form to take the appropriate action on the employee's record. PSSC will need to use a unique identifier, which should be provided by the new start, to search HRPTS in order to review previous employment records to ensure the new start is opted into the correct scheme.

It is important that HR retain the original copy in the event of disputes or queries raised by the member in the future.

### **Actions for HR**

- Ensure the new start receives information about the Pension Scheme by issuing the Scheme Guide.
- Ensure if the NJQ is returned there is a copy on the new start's file.
- Review the form and forward a copy to PSSC if the new start answers yes to questions 1,2,3,4,6 or 8.

### **Actions for the Payroll Shared Service Centre (PSSC)**

When PSSC receive the NJQ the following questions should be reviewed before setting up pension scheme deductions for the member:

- Q1, Q2, Q3 - Check any other employment the employee may hold to ensure they do not exceed the whole time equivalent hours permitted for scheme membership and amend accordingly.
- Q4, Q6 - If the employee is receiving HSC Pension Scheme benefits check if the employee meets the eligibility criteria to be a member of the scheme and action accordingly.
- Q7, Q8 - If the employee has answered Yes to Q7 and or Q8 check the employee's previous records to ascertain the correct contribution rates to be applied and ensuring continuity of the contracts.

A new start may choose to opt out of the HSC Pension Scheme and if that is the case they should send an SD502 Form to PSSC. PSSC should ensure Pension Contributions are not deducted from the employee's salary. Details of the Name, NI Number, Salary, Age, Gender and Reason for Opting Out should be recorded for reporting purposes. PSSC should ensure the Opt out forms are filed on the personnel file and can be accessed by employer if necessary.

Reports detailing opt out information such as the reasons for opt out, should be available via HRPTS.

### **Actions for HSC Pension Service**

If a member requests a transfer of benefits into the HSC Pension scheme, HSC Pension Service will issue the Transfer of Benefits Guide and associated documentation and complete this process and update the member's record accordingly.

HSC Pension Service should collate data from PSSC quarterly for presentation to Pension Scheme Board and completion of Biennial report.