

**NHS PENSION SCHEMES
2015/08**

WHO SHOULD READ: HR and Payroll Managers
GP Practice Managers
Direction Bodies
Practitioner Services Division

ACTION: To read and circulate as appropriate

SUBJECT: Mental Health Officers and Special Class members – reporting procedures

The purpose of this circular is to clarify the reporting procedures for members assessed to have Mental Health Officers status or Special Class status

It is the responsibility of NHS employers to decide whether a member may be entitled to Mental Health Officer (MHO) or Special Class (SC) status. These statuses are only applicable to 1995 section members of the scheme. Guidance on the qualifying criteria is available in the [employers guide](#).

When a member starts employment employers must consider a number of things before submitting the NSR01 starter form.

The first thing to consider is the member's date of birth. Members born on or after 1 April 1979 have no entitlement to MHO or SC Status. The "type of employment" (Group Code) should be marked as "01 – Officer" on the NSR01 form.

The next thing to consider is whether the member has previous service which gives entitlement to the 1995 section of the scheme. If the employer confirms that the member has no previous service, they should mark the group code as "01-Officer" on the NSR01 form.

If the member was born before 1 April 1979 and it is unclear whether the member has previous membership giving entitlement to the 1995 section, the employer must assess whether the post qualifies for MHO/SC status. If the post qualifies, employers should record the group code as below on the NSR01 starter form.

- 03 – MHO
- 04 – MHO/Physio/Health Visitor
- 05 – MHO (Manual)
- 06 – Special Class
- 08 – MHO/Doctor/GP Trainee
- 12 – Max P/T Specialist (MHO)

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- 14 – P/T Specialist (MHO)

When the NSR01 data is loaded to the Pension Administration System (PAS), SPPA runs a consistency check to confirm whether the member has entitlement to MHO/SC status. We will only apply MHO/SC to members of the 1995 section of the scheme. If the member is in the 2008/2015 section of the scheme, we will adjust the group code reference to 01 (Officer). We will confirm this by updating the active lists that we plan to send to employers on a quarterly basis. Employers should use this active list to update any changes.

Whilst it is the responsibility of employers to assess whether the post qualifies for MHO/SC status, SPPA will ultimately assess the member's entitlement and notify employers if MHO/SC status is not appropriate.

Changing jobs

It is important to remember that it is the post that qualifies for MHO/SC status and not the individual. Therefore, if a member changes post, an assessment must be made on the new post. If the new post does not attract MHO/SC status, a NSR04 form should be submitted to confirm the date the member changed status.

If the new post is with a new employer, the previous employer should send the routine NSR02 form and the new employer will submit a NSR01 after assessing the post.

Secondments – Mental Health Officers

Under the scheme regulations, if a member is on secondment or in training in a post that does not attract MHO status, MHO status can be retained during the period, providing the member returns to MHO duties within 12 months. If the member does not return to MHO duties within 12 months, the MHO status is lost for the whole period of the secondment or training. As there is no facility to report secondments on the NSR forms it is important that employers advise SPPA in writing that the member is going on secondment. The employer should include in the letter the expected duration of the secondment. Employers should also confirm in writing the date that the secondment/training finished. This will allow us to re-instate MHO status if appropriate.

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18 June 2015

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