

**Application for valuation of NHS Superannuation Benefits:  
Individual Protection 2016**

To obtain a valuation of your pension benefits at 5 April 2016 in order to apply to HMRC for Individual Protection 2016.

Please provide the following information:

**PART 1 – To be completed by member**

Superannuation number:	<input type="text"/>
Member surname	<input type="text"/>
Member forenames	<input type="text"/>
National insurance Number	<input type="text"/>
Members address	<input type="text"/>
Telephone number	<input type="text"/>
Email address	<input type="text"/>
Payroll reference if known	<input type="text"/>

Please sign and date this form below and forward to your NHS Payroll Department to complete Part 2 and forward to SPPA.

Member signature \_\_\_\_\_ Date \_\_\_\_\_

**PART 2 – To be completed by employer**

This member has advised SPPA they intend to apply to HMRC for Individual Protection 2016 to safeguard their pension entitlement against a tax charge. This protection is granted by HMRC on the actual value of their pension at 5 April 2016. SPPA are required to provide such members with highly accurate estimates of their pension value at this date and we therefore require the relevant pay details.

For **1995 section** members, SPPA require the pay details for the 3 years up to 05/04/2016 on page 2 (whole time members) or page 3 (part time members).

For **2008 section** members, SPPA require the annual return information for 01/04/2015 to 31/03/2016, plus the earnings from 01/04/2016 – 05/04/2016 on page 4.

Please also complete and sign the declaration on page 5 and return to SPPA.

**SECTION 2A – WHOLE TIME OFFICER**

**1995 Section members only**

**WHOLE TIME OFFICER**

Details of service and pensionable pay for the 365 days up to 05/04/2016 (including Domiciliary Consultation fees paid)

Period to which pensionable pay relates (365 days) with dates if rates change  (1)	No of days Contributing		Pay(pensionable pay) (i.e. that on which employer's contributions are based)		Dates of unpaid leave during the annual period in column (1)  (6)
	Cont'  (2)	Non Cont'  (3)	Pay exclude other superannuable payments' (OSP's)  (4)	OSP's  (5)	
Final Year					
2 <sup>nd</sup> Year					
3 <sup>rd</sup> Year					

Total annual pensionable pay (4) + (5)	Final Year	2 <sup>nd</sup> Year	3 <sup>rd</sup> Year

**SECTION 2B – PART-TIME OFFICER & BANK WORKERS**

**1995 Section members only**

PART-TIME OFFICER Part-time fraction for contracted hours i.e. 20/37.5

**PART-TIME OFFICER & BANK WORKERS**

Details of service and pensionable pay for the 365 days up to 05/04/2016 (excluding Domiciliary Consultation fees paid)

Period to which pensionable pay relates (365 days) with dates if rates change  (1)	No of days contributing		Basic Part-time pensionable pay (i.e. that on which employers contributions are based)			No of hours (estimate/ actual hours) worked during period in col (1)  (6)	Standard whole time hours for period in col (1)  (7)	Annual whole time equivalent pensionable pay for col (4) with dates of change similar to col (1)  (8)
	Cont'	Non Cont'	Actual pay exclude OSP's  (4)	OSP's to be uprated by SPPA  (5a)	OSP's not to be uprated by SPPA  (5b)			
Final Year								
2 <sup>nd</sup> Year								
3 <sup>rd</sup> Year								

	Final Year	2 <sup>nd</sup> year	3 <sup>rd</sup> Year
Total annual pensionable pay (4) + (5)			
Domiciliary Consultation fees			

## SECTION 2C – 2008 Section members only

Inclusive date to which earnings will be paid  
(please include any period of untaken annual leave)

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Earnings details for the year 01/04/2015 to 31/03/2016 (required for all whole time and part-time staff)

Day		Month		Year		Total superannuable pay	Number of days worked	Non con days	Dates of unpaid leave
3	1	0	3	1	6				

## Earnings details for the part year from 01/04/2016 to 05/04/2016

### Whole time officer

Day		Month		Year		Total superannuable pay	Number of days worked	Non con days	Dates of unpaid leave
0	1	0	4	1	6				
to									
0	5	0	4	1	6				

Annual rate of salary at 05/04/2016

£

### Part time officer

### Part time fraction for contracted hours i.e. 20/37.5

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Day		Month		Year		Total superannuable pay (inc OSP payments)	Projected days worked	Non con days	Whole time equivalent
0	1	0	4	1	6				
to									
0	5	0	4	1	6				

Annual rate of salary at 05/04/2016

£

## Employers Declaration

To the best of my knowledge all information given in this form is correct and signed and dated by the member.

Signature	<input type="text"/>
Official designation	<input type="text"/>
Name (in BLOCK LETTERS please)	<input type="text"/>
Employing Authority	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	Post Code <input type="text"/>
Telephone No	<input type="text"/>
Email address	<input type="text"/>
Date	<input type="text"/> / <input type="text"/> / <input type="text"/>

**Please return form to SPPA, 7 Tweedside Park, Tweedbank, Galashiels, TD1 3TE**