

## Type 2 Medical Practitioner Self Assessment form for scheme years 2009/10 to 2014/15:

This form should only be completed by GPs in England & Wales who have not already completed and submitted a Type 2 self-assessment form for one or more of the scheme years 2009/2010 to 2014/15 inclusive. The form is not to be used for any other purpose.

If you have submitted a form for some of those years please complete the missing years only. Any requests for earlier years forms can be requested at [nhsbsa.practitioners@nhs.net](mailto:nhsbsa.practitioners@nhs.net)

### **Please read these notes carefully before completing the form.**

#### **Part 1**

Please complete boxes A – E in full. This is to ensure that Primary Care Support England (PCSE) for work in England and LHB for work in Wales, are able to reconcile the payments and the forms, and update your pension record accordingly.

If you were on paid maternity, paternity or sick leave for any period from 01/04/2009 to 31/03/2015, PCSE will contact you or the practices direct for further information.

#### **Part 2**

If you have not worked continuously (i.e. if you have had ANY breaks of 1 month or more) as a Type 2 GP from 01/04/2009 to 31/03/2015, please complete Part 2 for each year as much as possible.

If you need more space then please enter the information on the “Additional Information” sheet attached.

If you have worked continuously without any breaks, please go to Part 3

#### **Part 3**

Part 3 needs to be completed for each year that you are claiming NHS Pension Scheme membership.

**Box 1** – please enter all the type 2 GP pay you have paid pension contributions on. Type 2 work is:

Salaried GP in a practice  
Assistant GP in a practice  
OOH work via SOLO forms  
GPwSI work via SOLO forms  
Appraisal work via SOLO forms  
CCG work via SOLO forms

**Box 1a** – Enter the contributions already paid

**Box 1b** – This box calculates the contributions due based on the tiered contributions rate in box 4d. This box self populates.

**Box 1c** – This box calculates the amount of contributions either over or under paid based on the figures in boxes 1 and 1a

**Box 2** – Enter all the type 1 pay that you paid pension contributions on. Type 1 work is your share of the pensionable profits from:

A Partnership  
Limited company where you are a shareholder  
Sole trader where you are the holder of an APMS or GMS contract or a PMS agreement.

**Box 2a** – Enter the contributions already paid

**Box 2b** – This box calculates the contributions due based on the tiered contributions rate in box 4d. This box self populates.

**Box 2c** – This box calculates the amount of contributions either over or under paid based on

**Box 2c** – This box calculates the amount of contributions either over or under paid based on the figures in boxes 1 and 1a

**Box 3** – Please enter all the Locum pay that you have pensioned via Locum forms A & B.

**Box 3a** – Enter the contributions already paid

**Box 3b** – This box calculates the contributions due based on the tiered contributions rate in box 4d. This box self populates.

**Box 3c** – This box calculates the amount of contributions either over or under paid based on the figures in boxes 1 and 1a

**Box 4** – This is the total of your GP NHS pensionable pay and will self-populate.

**Box 4 a** - This is the total contributions paid and will self-populate

**Box 4b** - This is the total amount of contributions owed and will self-populate

**Box 4c** – This is the total contributions overpaid (in black) or underpaid (in red)

**Box 4d** – This is the contribution rate based on the income entered in boxes 1, 2 and 3.

When you have completed the form, please sign and date the declaration page.

#### **Send the completed form to PCSE of your LHB**

**Arrears of contributions:** If the amount in box 4c is in red you will owe arrears of contributions for the relevant year. You must pay these arrears to PCSE/LHB immediately in the form of a cheque attached to the form.

**Overpayment of contributions:** if the amount in box 4c is in black you will have overpaid pension contributions and PCSE/LHB will contact you directly about this.

**Added Years/Additional Pension:** If you have an Added Years or Additional Pension contract you must ensure that you have paid the additional contributions.

Added Years contributions are paid in **every** post whereas Additional Pension contributions are paid through the one main pensionable post.

Prior to 1 April 2008, members who first joined the Scheme on or after 1 June 1989 were subject to the pensionable earnings cap; i.e. the member could only pension NHS earnings in the NHS Pension Scheme up to a prescribed limit.

If a member joined before 1 June 1989 but had a break in pensionable employment of more than a year which ended after 1 June 1989 and before 1 April 2008 they were also subject to the cap.

With effect from 1 April 2008, the earnings cap has been removed and mainline employer and tiered employee contributions are to be based upon full NHS pensionable earnings.

However, if a Practitioner who was previously subject to the cap is buying added years under an agreement that started before 1 April 2008 those Added Years remain subject to the cap. The pensionable pay in respect of capped Practitioner Added Years contributions is as follows:

Year 2009/10 £123,600.00  
Year 2010/11 £123,600.00  
Year 2011/12 £129,600.00  
Year 2012/13 £137,400.00  
Year 2013/14 £141,000.00  
Year 2014/15 £145,800.00

Any Added Years agreements starting on or after 1 April 2008, are **not** subject to the earnings cap and contributions will be payable on the full actual NHS pensionable earnings.

If you (or your accountant) have any questions please contact NHS Pensions using the following email address: [nhsbsa.practitioners@nhs.net](mailto:nhsbsa.practitioners@nhs.net). Please note that we cannot completed the form for you.

**TYPE 2 MEDICAL PRACTITIONER - 2009/2010 to 2014/15 SELF ASSESSMENT FORM**

**Part 1**

Please state your full name  
Current address

|  |
|--|
|  |
|  |
|  |
|  |
|  |
|  |

**Box  
A**

E-Mail address

State your NHS Pension Scheme reference number

**B**

State your National Insurance number

**C**

State your host Area Team (England) or LHB (Wales) for the following years

|                  |  |
|------------------|--|
| <b>2009/2010</b> |  |
| <b>2010/2011</b> |  |
| <b>2011/2012</b> |  |
| <b>2012/2013</b> |  |
| <b>2013/2014</b> |  |
| <b>2014/2015</b> |  |

**D**

List the names and addresses of all the Practice(s)/Centre(s), OOHPs, CCGs and Local Health Boards (Wales) who you directly worked for in :

|                  |  |
|------------------|--|
| <b>2009/2010</b> |  |
| <b>2010/2011</b> |  |
| <b>2011/2012</b> |  |
| <b>2012/2013</b> |  |
| <b>2013/2014</b> |  |
| <b>2014/2015</b> |  |

**E**

Were you on paid maternity, paternity or sick leave at any time during the period 2009/2010 to 2014/15?  
If so please contact Primary Care Support England will contact you to discuss this.

**If you have had any breaks of one month or more in years 2009/2010 to 2014/2015 please complete Part 2 before completing Part 3  
If you have worked continuously from 2009/2010 to 2014/15 then please go to Part 3**

**PART 2 - BREAKS IN SERVICE**

Please enter the start and end date for each separate period of work in years 2009/2010 TO 2014/15

|                  |            |                      |          |                      |
|------------------|------------|----------------------|----------|----------------------|
| <b>2009/2010</b> | START DATE | <input type="text"/> | END DATE | <input type="text"/> |
|                  |            | <input type="text"/> |          | <input type="text"/> |
|                  |            | <input type="text"/> |          | <input type="text"/> |
| <b>2010/2011</b> | START DATE | <input type="text"/> | END DATE | <input type="text"/> |
|                  |            | <input type="text"/> |          | <input type="text"/> |
|                  |            | <input type="text"/> |          | <input type="text"/> |
| <b>2011/2012</b> | START DATE | <input type="text"/> | END DATE | <input type="text"/> |
|                  |            | <input type="text"/> |          | <input type="text"/> |
|                  |            | <input type="text"/> |          | <input type="text"/> |
| <b>2012/2013</b> | START DATE | <input type="text"/> | END DATE | <input type="text"/> |
|                  |            | <input type="text"/> |          | <input type="text"/> |
|                  |            | <input type="text"/> |          | <input type="text"/> |
| <b>2013/2014</b> | START DATE | <input type="text"/> | END DATE | <input type="text"/> |
|                  |            | <input type="text"/> |          | <input type="text"/> |
|                  |            | <input type="text"/> |          | <input type="text"/> |
| <b>2014/2015</b> | START DATE | <input type="text"/> | END DATE | <input type="text"/> |
|                  |            | <input type="text"/> |          | <input type="text"/> |
|                  |            | <input type="text"/> |          | <input type="text"/> |

**PART 3 - PENSIONABLE PAY AND CONTRIBUTIONS**

**2009/2010**

In box 1 state ALL your type 2 NHS pensionable pay from ALL the Practices/Centres named in box E for this year. State the contributions you paid in box 1a.

| Pensionable pay        | Contributions already paid | Contributions due | Amount over/under paid | Tiered contribution rate |
|------------------------|----------------------------|-------------------|------------------------|--------------------------|
| <input type="text"/> 1 | <input type="text"/> 1a    | £0.00 1b          | £0.00 1c               |                          |

In box 2 state ALL your type 1 NHS pensionable pay from all the Practices/Centres named in box E for this year. State the contributions you paid in box 2a.

|                        |                         |          |          |  |
|------------------------|-------------------------|----------|----------|--|
| <input type="text"/> 2 | <input type="text"/> 2a | £0.00 2b | £0.00 2c |  |
|------------------------|-------------------------|----------|----------|--|

In box 3 state ALL your Locum NHS pensionable pay from all the Practices/Centres named in box E for this year. State the contributions you paid in box 3a.

|                        |                         |          |          |  |
|------------------------|-------------------------|----------|----------|--|
| <input type="text"/> 3 | <input type="text"/> 3a | £0.00 3b | £0.00 3c |  |
|------------------------|-------------------------|----------|----------|--|

Box 4 is your total GP NHS pensionable pay in year 2009/2010. Box 4a is the total NHS employee contributions paid. Box 4d is your tiered contributions rate for this year

|         |          |          |          |          |
|---------|----------|----------|----------|----------|
| £0.00 4 | £0.00 4a | £0.00 4b | £0.00 4c | 5.00% 4d |
|---------|----------|----------|----------|----------|

**2010/2011**

In box 1 state ALL your type 2 NHS pensionable pay from ALL the Practices/Centres named in box E for this year. State the contributions you paid in box 1a.

| Pensionable pay        | Conts already paid      | Contributions due | Amount over/under paid | Tiered contribution rate |
|------------------------|-------------------------|-------------------|------------------------|--------------------------|
| <input type="text"/> 1 | <input type="text"/> 1a | £0.00 1b          | £0.00 1c               |                          |

In box 2 state ALL your type 1 NHS pensionable pay from all the Practices/Centres named in box E for this year. State the contributions you paid in box 2a.

|                        |                         |          |          |  |
|------------------------|-------------------------|----------|----------|--|
| <input type="text"/> 2 | <input type="text"/> 2a | £0.00 2b | £0.00 2c |  |
|------------------------|-------------------------|----------|----------|--|

In box 3 state ALL your Locum NHS pensionable pay from all the Practices/Centres named in box E for this year. State the contributions you paid in box 3a.

|                        |                         |          |          |  |
|------------------------|-------------------------|----------|----------|--|
| <input type="text"/> 3 | <input type="text"/> 3a | £0.00 3b | £0.00 3c |  |
|------------------------|-------------------------|----------|----------|--|

Box 4 is your total GP NHS pensionable pay in year 2010/11. Box 4a is the total NHS employee contributions paid. Box 4d is your tiered contributions rate for this year

|         |          |          |          |          |
|---------|----------|----------|----------|----------|
| £0.00 4 | £0.00 4a | £0.00 4b | £0.00 4c | 5.00% 4d |
|---------|----------|----------|----------|----------|

**2011/2012**

In box 1 state ALL your type 2 NHS pensionable pay from ALL the Practices/Centres named in box E for this year. State the contributions you paid in box 1a.

| Pensionable pay        | Conts already paid      | Contributions due | Amount over/under paid | Tiered contribution rate |
|------------------------|-------------------------|-------------------|------------------------|--------------------------|
| <input type="text"/> 1 | <input type="text"/> 1a | £0.00 1b          | £0.00 1c               |                          |

In box 2 state ALL your type 1 NHS pensionable pay from all the Practices/Centres named in box E for this year. State the contributions you paid in box 2a.

|                        |                         |          |          |  |
|------------------------|-------------------------|----------|----------|--|
| <input type="text"/> 2 | <input type="text"/> 2a | £0.00 2b | £0.00 2c |  |
|------------------------|-------------------------|----------|----------|--|

In box 3 state ALL your Locum NHS pensionable pay from all the Practices/Centres named in box E for this year. State the contributions you paid in box 3a.

|                        |                         |          |          |  |
|------------------------|-------------------------|----------|----------|--|
| <input type="text"/> 3 | <input type="text"/> 3a | £0.00 3b | £0.00 3c |  |
|------------------------|-------------------------|----------|----------|--|

Box 4 is your total GP NHS pensionable pay in year 2011/12. Box 4a is the total NHS employee contributions paid. Box 4d is your tiered contributions rate for this year

|         |          |          |          |          |
|---------|----------|----------|----------|----------|
| £0.00 4 | £0.00 4a | £0.00 4b | £0.00 4c | 5.00% 4d |
|---------|----------|----------|----------|----------|

**2012/2013**

In box 1 state ALL your type 2 NHS pensionable pay from ALL the Practices/Centres named in box E for this year. State the contributions you paid in box 1a.

| Pensionable pay               | Conts already paid            | Contributions due                  | Amount over/under paid             | Tiered contribution rate |
|-------------------------------|-------------------------------|------------------------------------|------------------------------------|--------------------------|
| <input type="text" value=""/> | <input type="text" value=""/> | <input type="text" value="£0.00"/> | <input type="text" value="£0.00"/> |                          |

1c

In box 2 state ALL your type 1 NHS pensionable pay from all the Practices/Centres named in box E for this year. State the contributions you paid in box 2a.

|                               |                               |                                    |                                    |  |
|-------------------------------|-------------------------------|------------------------------------|------------------------------------|--|
| <input type="text" value=""/> | <input type="text" value=""/> | <input type="text" value="£0.00"/> | <input type="text" value="£0.00"/> |  |
|-------------------------------|-------------------------------|------------------------------------|------------------------------------|--|

2c

In box 3 state ALL your Locum NHS pensionable pay from all the Practices/Centres named in box E for this year. State the contributions you paid in box 3a.

|                               |                               |                                    |                                    |  |
|-------------------------------|-------------------------------|------------------------------------|------------------------------------|--|
| <input type="text" value=""/> | <input type="text" value=""/> | <input type="text" value="£0.00"/> | <input type="text" value="£0.00"/> |  |
|-------------------------------|-------------------------------|------------------------------------|------------------------------------|--|

3c

Box 4 is your total GP NHS pensionable pay in year 2009/2010. Box 4a is the total NHS employee contributions paid. Box 4d is your tiered contributions rate for this year

|                                    |                                    |                                    |                                    |                                    |
|------------------------------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|
| <input type="text" value="£0.00"/> | <input type="text" value="£0.00"/> | <input type="text" value="£0.00"/> | <input type="text" value="£0.00"/> | <input type="text" value="5.00%"/> |
|------------------------------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|

4c

4d

**2013/2014**

In box 1 state ALL your type 2 NHS pensionable pay from ALL the Practices/Centres named in box E for this year. State the contributions you paid in box 1a.

| Pensionable pay               | Conts already paid            | Contributions due                  | Amount over/under paid             | Tiered contribution rate |
|-------------------------------|-------------------------------|------------------------------------|------------------------------------|--------------------------|
| <input type="text" value=""/> | <input type="text" value=""/> | <input type="text" value="£0.00"/> | <input type="text" value="£0.00"/> |                          |

1c

In box 2 state ALL your type 1 NHS pensionable pay from all the Practices/Centres named in box E for this year. State the contributions you paid in box 2a.

|                               |                               |                                    |                                    |  |
|-------------------------------|-------------------------------|------------------------------------|------------------------------------|--|
| <input type="text" value=""/> | <input type="text" value=""/> | <input type="text" value="£0.00"/> | <input type="text" value="£0.00"/> |  |
|-------------------------------|-------------------------------|------------------------------------|------------------------------------|--|

2c

In box 3 state ALL your Locum NHS pensionable pay from all the Practices/Centres named in box E for this year. State the contributions you paid in box 3a.

|                               |                               |                                    |                                    |  |
|-------------------------------|-------------------------------|------------------------------------|------------------------------------|--|
| <input type="text" value=""/> | <input type="text" value=""/> | <input type="text" value="£0.00"/> | <input type="text" value="£0.00"/> |  |
|-------------------------------|-------------------------------|------------------------------------|------------------------------------|--|

3c

Box 4 is your total GP NHS pensionable pay in year 2013/14. Box 4a is the total NHS employee contributions paid. Box 4d is your tiered contributions rate for this year

|                                    |                                    |                                    |                                    |                                    |
|------------------------------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|
| <input type="text" value="£0.00"/> | <input type="text" value="£0.00"/> | <input type="text" value="£0.00"/> | <input type="text" value="£0.00"/> | <input type="text" value="5.00%"/> |
|------------------------------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|

4c

4d

**2014/2015**

In box 1 state ALL your type 2 NHS pensionable pay from ALL the Practices/Centres named in box E for this year. State the contributions you paid in box 1a.

| Pensionable pay               | Conts already paid            | Contributions due                  | Amount over/under paid             | Tiered contribution rate |
|-------------------------------|-------------------------------|------------------------------------|------------------------------------|--------------------------|
| <input type="text" value=""/> | <input type="text" value=""/> | <input type="text" value="£0.00"/> | <input type="text" value="£0.00"/> |                          |

1c

In box 2 state ALL your type 1 NHS pensionable pay from all the Practices/Centres named in box E for this year. State the contributions you paid in box 2a.

|                               |                               |                                    |                                    |  |
|-------------------------------|-------------------------------|------------------------------------|------------------------------------|--|
| <input type="text" value=""/> | <input type="text" value=""/> | <input type="text" value="£0.00"/> | <input type="text" value="£0.00"/> |  |
|-------------------------------|-------------------------------|------------------------------------|------------------------------------|--|

2c

In box 3 state ALL your Locum NHS pensionable pay from all the Practices/Centres named in box E for this year. State the contributions you paid in box 3a.

|                               |                               |                                    |                                    |  |
|-------------------------------|-------------------------------|------------------------------------|------------------------------------|--|
| <input type="text" value=""/> | <input type="text" value=""/> | <input type="text" value="£0.00"/> | <input type="text" value="£0.00"/> |  |
|-------------------------------|-------------------------------|------------------------------------|------------------------------------|--|

3c

Box 4 is your total GP NHS pensionable pay in year 2014/15. Box 4a is the total NHS employee contributions paid. Box 4d is your tiered contributions rate for this year

|                                    |                                    |                                    |                                    |                                    |
|------------------------------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|
| <input type="text" value="£0.00"/> | <input type="text" value="£0.00"/> | <input type="text" value="£0.00"/> | <input type="text" value="£0.00"/> | <input type="text" value="5.00%"/> |
|------------------------------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|

4c

4d

## NHS Pension Scheme Employee Tiered Contribution rates for scheme years 2009/10 to 2014/15

### 2009/10

| <b>Pay band</b>               | <b>Contribution percentage rate</b> |
|-------------------------------|-------------------------------------|
| Up to £20,224                 | 5%                                  |
| £20,225 to £66,789            | 6.50%                               |
| £66,790 to £105,318           | 7.50%                               |
| £105,319 to any higher amount | 8.50%                               |

### 2010/11

| <b>Pensionable Pay band</b>   | <b>Contribution percentage rate</b> |
|-------------------------------|-------------------------------------|
| Up to £21,175                 | 5.00%                               |
| £21,176 to £69,931            | 6.50%                               |
| £69,932 to £110,273           | 7.50%                               |
| £110,274 to any higher amount | 8.50%                               |

### 2011/12

| <b>Pensionable Pay band</b>   | <b>Contribution percentage rate</b> |
|-------------------------------|-------------------------------------|
| Up to £21,175                 | 5.00%                               |
| £21,176 to £69,931            | 6.50%                               |
| £69,932 to £110,273           | 7.50%                               |
| £110,274 to any higher amount | 8.5%                                |

### 2012/13

| <b>Pensionable Pay band</b>   | <b>Contribution percentage rate</b> |
|-------------------------------|-------------------------------------|
| Up to £21,175                 | 5.00%                               |
| £21,176 to £26,557            | 6.50%                               |
| £26,558 to £48,982            | 8.00%                               |
| £48,983 to £69,931            | 8.90%                               |
| £69,932 to £110,273           | 9.90%                               |
| £110,274 to any higher amount | 10.90%                              |

### 2013-2014

| <b>Pensionable Pay Band</b>   | <b>Contribution Percentage Rate</b> |
|-------------------------------|-------------------------------------|
| Up to £15,431                 | 5.00%                               |
| £15,432 to £21,387            | 5.30%                               |
| £21,388 to £26,823            | 6.80%                               |
| £26,824 to £49,472            | 9.00%                               |
| £49,473 to £70,630            | 11.30%                              |
| £70,631 to £111,376           | 12.30%                              |
| £111,377 to any higher amount | 13.3%                               |

### 2014-2015

| <b>Pensionable Pay band</b>   | <b>Contribution percentage rate</b> |
|-------------------------------|-------------------------------------|
| Up to £15,431                 | 5.00%                               |
| £15,432 to £21,387            | 5.60%                               |
| £21,388 to £26,823            | 7.10%                               |
| £26,824 to £49,472            | 9.30%                               |
| £49,473 to £70,630            | 12.50%                              |
| £70,631 to £111,376           | 13.50%                              |
| £111,377 to any higher amount | 14.50%                              |

## Declaration

Please note: providing false information may lead to investigation, prosecution or referral to a regulatory body.

I confirm that:

- The total GP NHS pensionable income declared in Box 4 excludes private income and bonuses.
- The total GP NHS Pensionable income declared in Box 4 excludes Officer income; i.e. a salaried hospital doctor post.
- If I have paid NHS employee contributions at an incorrect lower rate I shall pay all the arrears over to PCSE.
- If I have paid any employee contributions at a higher rate I am aware that PCSE will contact me directly about this.
- The information provided is correct and will be consistent (though may not be identical) with my HMRC tax return.
- I have paid Added Years contributions (if relevant) on all my NHS Pensionable income using the relevant forms.
- I have paid my Additional Pension contributions (if relevant) through one nominated pensionable post.
- By completing this form I am aware that if I have not settled any underpayment of contributions my pensionable earnings for the years listed on this form may be set to zero in accordance with the NHS Pension Scheme Regulations even though I have already paid over contributions on account.
- All the NHS pensionable income I have declared I have done so as an individual and not as a limited company or similar; i.e. I have not incorporated.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Name in capitals \_\_\_\_\_

### 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 our website at [www.nhsbsa.nhs.uk/yourinformation](http://www.nhsbsa.nhs.uk/yourinformation)

## Additional information