

## NHS Pensions – Public Service Pensions Remedy (PSPR) Cost Claim Back application

Use this form to claim back direct financial losses linked to the Public Service Pensions Remedy (PSPR) - see our website at [www.nhsbsa.nhs.uk/changes-public-service-pensions](http://www.nhsbsa.nhs.uk/changes-public-service-pensions). The types of losses covered should meet conditions 1 or 2 in paragraph 5 of the scheme rules - see [www.nhsbsa.nhs.uk/changes-public-service-pensions/nhs-cost-claim-back-scheme](http://www.nhsbsa.nhs.uk/changes-public-service-pensions/nhs-cost-claim-back-scheme). These losses may include some payments for professional services or advice from Accountants and Independent Financial Advisers (IFA).

The Guidance section at the end of this form includes a summary of the losses covered by the scheme rules, the limits for professional services and advice, plus information and evidence you need to include.

### Do not use this form for:

- **Tax payments** – if your tax position is affected because an annual allowance charge has changed, or you are a personal representative and a lifetime allowance charge has changed, then you need to use the HMRC Digital Service at: [www.gov.uk/guidance/calculate-your-public-service-pension-adjustment](http://www.gov.uk/guidance/calculate-your-public-service-pension-adjustment) Follow the process on the HMRC website for how to claim back overpaid tax, or ways you can pay tax you may owe. For a change to an annual allowance charge you'll need the information we'll give you in your Remediable Pension Savings Statement (RPSS). For when to expect your RPSS see [www.nhsbsa.nhs.uk/changes-public-service-pensions/understanding-effect-rollback-annual-allowance](http://www.nhsbsa.nhs.uk/changes-public-service-pensions/understanding-effect-rollback-annual-allowance). For a change to a lifetime allowance charge you'll need the information we'll give you in your Remediable Service Statement (RSS).
- **Contingent decisions** – if you made a decision about your pension benefits that would have been different had it not been for the discrimination identified by the courts, e.g. opting out of the NHS pension scheme, please go to [www.nhsbsa.nhs.uk/changes-public-service-pensions/contingent-decisions](http://www.nhsbsa.nhs.uk/changes-public-service-pensions/contingent-decisions) for information on situations we'll be contacting members about and your options if you have a different situation.
- **Previous claims** – if you've already had a payment through a court order or another scheme, had an amount you owed to the pension scheme reduced by an equivalent amount to the sum you are seeking to claim back, or have previously submitted a claim to us for the same amount. You can't claim back direct financial losses linked to the Public Service Pensions remedy in these circumstances.

Send your completed form by email to [costclaimback@nhsbsa.nhs.uk](mailto:costclaimback@nhsbsa.nhs.uk) or by post to NHS Pensions, PO Box 2269, Bolton, BL6 9JS. Use a secure email such as your NHS work email if you have one – emails from personal email accounts are sent at your own risk.

We'll write to tell you if your claim is successful or not within 30 days of reaching a decision about your claim. For a successful claim we'll tell you the amount you're due and pay this amount into your bank account.

### How we use your information

The NHS Business Services Authority will use the information in this form to process your cost claim back application. We may share your information to administer, determine entitlement and make a payment, enable us to prevent and detect fraud and mistakes, 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)

**Complete all sections.** If you have difficulty completing this form, you can ask someone to help you or email us at [costclaimback@nhsbsa.nhs.uk](mailto:costclaimback@nhsbsa.nhs.uk).

**Section 1: About the member.** Use CAPITAL LETTERS and BLACK INK

Enter the NHS Pension Scheme membership number (if known)

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Title (e.g. Mr, Mrs, Miss, Dr)

Surname

Former surname (if applicable)

Other names

National Insurance number

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Date of birth

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Contact address

Post code

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Contact telephone number

Contact email address

**Section 2: About you**

I am the member – continue to section 3.

I am the member's personal representative – complete your details below.

Title (e.g. Mr, Mrs, Miss, Dr)

Surname

Former surname (if applicable)

Other names

Contact telephone number

Contact address

Post code

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Contact email address

**Tick one box**

I have ordinary power of attorney/lasting power of attorney (delete as appropriate) – attach a copy of your power of attorney and continue to Section 3.

I am the legal personal representative of the deceased member's estate – continue to Section 3.

**Section 3: About your claim**

I am claiming costs for:

- the professional services of an Independent Financial Advisor.
- the professional services of an Accountant.
- other professional services.
- other direct financial loss.

The total amount of direct financial loss I am applying to claim back is

£
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Give details of the direct financial loss and how it meets either condition 1 or 2 in paragraph 5 of the PSPR Cost Claim Back Scheme rules

I incurred this cost because:
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***Continue on a separate sheet if you need to, making sure to write the NHS Pension Scheme membership number on each sheet***

Details of the professional services provider, the professional services provided and the amount claimed.

Name and Address of Professional services provider	Professional services provided	Amount claimed £

I attach the following evidence of the direct loss I incurred as a consequence of the discrimination identified by the Court and/or the PSPR.

- A statement from the professional services provider named above showing an itemised list of the services they provided.
- A receipt, invoice or bank statement confirming the costs I'm claiming have been paid.
- Any other relevant documentation.

Use a separate application form for costs paid to a different professional services provider or in respect of a separate direct financial loss.

We will contact you if we need any additional evidence or documentation to review your claim.

**Section 4: Your payment details**

**Provide details of the account to pay approved reclaimed costs into:**

Name(s) of account holder(s) as on your account

Branch Sort code

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Account / Building Society Roll Number:

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If your bank is outside the UK say which country it is in – see [www.nhsbsa.nhs.uk/member-hub/apply-ing-your-pension](http://www.nhsbsa.nhs.uk/member-hub/apply-ing-your-pension) . You will need to complete the mandate and attach it to this form.

Name of bank/building society – UK Channel Islands or Isle of Man only

Address of bank/building society

Postcode

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**Section 5: Your declaration**

I declare that:

- I am the person who is claiming
- The information I have given in this application form is correct and complete to the best of my knowledge and belief
- If I become aware of any change to the information given, or any new information relevant to my claim, I will notify the NHS Business Services Authority straightaway
- I have read and understood the NHS Pensions – Public Service Pensions Remedy Cost Claim Back Scheme rules at [www.nhsbsa.nhs.uk/changes-public-service-pensions/nhs-cost-claim-back-scheme](http://www.nhsbsa.nhs.uk/changes-public-service-pensions/nhs-cost-claim-back-scheme)
- I have read the guidance notes at the end of this form.

I understand that:

- The NHS Business Services Authority will seek to recover any payment made under the NHS Pensions PSPR Cost Claim Back rules, if I have made false representation, withheld relevant information, or I am not legally entitled to claim the payment.
- If I provide the NHS Business Services Authority with false or misleading information, I may be liable to civil proceedings.

Your signature

Date

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**Email your completed form to [costclaimback@nhsbsa.nhs.uk](mailto:costclaimback@nhsbsa.nhs.uk) and attach scans of your evidence or post it with copies of your evidence to: NHS Pensions, PO Box 2269, Bolton, BL6 9JS. Use a secure email such as your NHS work email if you have one - emails from personal email accounts are sent at your own risk.**

**Guidance for completing your Cost Claim Back application - see the full scheme rules at [www.nhsbsa.nhs.uk/changes-public-service-pensions/nhs-cost-claim-back-scheme](http://www.nhsbsa.nhs.uk/changes-public-service-pensions/nhs-cost-claim-back-scheme)**

- **Qualifying losses** – see paragraph 5.1 of the PSPR Cost Claim Back Scheme rules. Condition 1 states the losses must be due to the discrimination identified by the courts. Condition 2 states the loss must be linked to pensionable service in the 1995/2008 Scheme and the 2015 Scheme between 1 April 2015 and 31 March 2022, and due to how the Public Service Pensions Remedy has been applied to the pension benefits.
- **Eligibility** – for full eligibility conditions see paragraph 6 of the PSPR Cost Claim Back Scheme rules. You can apply if you are a remedy member, a designated person, or the personal representative of a remedy member who has died, or who is incapable of making a claim.

**Time limits** – see paragraph 9 of the scheme rules. You can apply up to 12 months after you receive your Remediable Pension Savings Statement (RPSS) or your first Remedial Service Statement (RSS).

- **Eligible costs** – see paragraph 5 of the scheme rules for costs that qualify as compensatable losses. These may include a claim for accountancy services to complete an application using the HMRC Digital Service, limited to £1,000 including VAT per piece of advice. And a claim for IFA services to support a choice between 1995/2008 and 2015 scheme benefits, limited to £500 including VAT per piece of advice. We will contact you for additional evidence if we need it to review your claim.
- **Evidence of the costs you paid out** – you should provide scans or print outs of itemised statements, invoices, receipts, or bank statements as evidence of the direct financial loss that you incurred and are claiming. If you paid for professional services or advice from Accountants and Independent Financial Advisers (IFA), the evidence you provide in section 3 must explain the areas on which the services or advice were sought and how these areas are related to the discrimination identified by the Court and/or the application of the remedy.
- **Other types of costs** – for information about costs that are not covered by this process, see [www.nhsbsa.nhs.uk/changes-public-service-pensions/contingent-decisions](http://www.nhsbsa.nhs.uk/changes-public-service-pensions/contingent-decisions)
- **Remediable Pensions Savings Statement (RPSS)** – If you're an active or deferred member and you're affected by rollback and annual allowance, you'll be sent a RPSS. It will show how much your pension benefits grew in the 1995/2008 Scheme for each of the remedy tax years plus any carry forward tax years that apply, as well as your pension benefit growth for tax year 2022/23. If you're already receiving your NHS pension benefits, once you've made your retrospective choice about which benefits you would like to receive for your pensionable service during the remedy period, we'll send you a RPSS if your choice means you'll need one. You'll need this to use HMRC's Digital Service. See [www.nhsbsa.nhs.uk/changes-public-service-pensions/understanding-effect-rollback-annual-allowance](http://www.nhsbsa.nhs.uk/changes-public-service-pensions/understanding-effect-rollback-annual-allowance) for when to expect to receive your RPSS.
- **Remediable Service Statement (RSS)** – if you're the legal personal representative of a member who has died, you'll need to have received an RSS and made your retrospective choice of pension benefits for the member's service during the remedy period before you can use HMRC's Digital Service. You may then claim for any direct financial loss linked to a lifetime allowance charge adjustment.