

# Annex 4C

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New entrant and rejoiner processes



# Table 1 – New entrants

Process Owner	Trigger points and pension actions	Service Standard/timeliness of completed action
Employer	Decides to appoint. Send Pensions Questionnaire and covering letter to new entrant with instruction on when to return it. See Annex B, letter text K.	Within 48 hours of making decision to appoint.
New entrant	Returns completed questionnaire, showing no previous Civil Service Pension (CSP) employment.	Within time specified on letter or, where prospective employee requests an extension because of extenuating circumstances, by employer verbal agreement.
Employer	As Pensions Questionnaire shows no previous CSP employment: 1) Email the New Starter Pack from the Joiner Tool. Where email is not an option, then order Starter Pack from the Scheme Administrator (Capita) using the New Starter Pack Request spreadsheet; 2) issue LOA using text in Annex B, letter A ('alpha version'); 3) set up payroll record, defaulting new entrant.	Within five working days of receiving completed questionnaire.
Scheme Administrator	Checks and collates requests and orders packs from the print supplier. <b>This only applies if you are requesting a printed new starter pack to be sent by post.</b>	Within five working days.
Print provider	Dispatches Starter Pack to new entrant (or employer depending upon the type of request). <b>This only applies if you are requesting a printed new starter pack to be sent by post.</b>	Within 48 hours of receiving order.

Process Owner	Trigger points and pension actions	Service Standard/timeliness of completed action
New entrant	Reads pack and completes Pension Choices form to confirm membership of <b>eligible scheme</b> or apply for <b>partnership</b> . Send to employer, as per address on form.	Within three months of start date (if applying for <b>partnership</b> new entrants must return their form within one month if they wish their choice to be backdated to their first day).
Employer (if Choice form is returned to employer)	<p>If new entrant's choice is the scheme they are eligible for, forward the form to the Scheme Administrator as new entrant will already have been enrolled.</p> <p>If new entrant's choice is <b>partnership</b>, follow actions given in Employers' Pension Guide, Section 4.2. 'Unscramble' any contributions, as appropriate.</p> <p>If new entrant wishes to opt out, follow the action in 4.1.52 (also detailed in Annex 5D) and send the Pensions Choices form to the Scheme Administrator.</p>	<p>Within 10 working days of receiving Choice form.</p> <p>Before next available pay run date.</p> <p>Before next available pay run date.</p>
Scheme Administrator	Process Pension Choices form as agreed with employer and in line with the Scheme Manager (Cabinet Office), procedures and set up any required pension action (as detailed in 4.1.52 and Annex 5D).	Within five working days of receiving form.

## Table 2 – Rejoiners (people who have previously worked for a CSP employer)

Process Owner	Trigger points and pension actions	Service Standard/timeliness of completed action
Employer	Decides to appoint. Sends Pensions Questionnaire and covering letter to rejoiner with instruction on when to return it. See Annex B, letter text K.	Within 48 hours of making decision to appoint.
New entrant	Returns completed questionnaire, showing previous CSP employment.	Within time specified on letter or, where prospective employee requests an extension because of extenuating circumstances, by employer verbal agreement.
Employer	<ol style="list-style-type: none"> <li>1) Checks pension choices by inputting information from questionnaire onto the 'Joiner Tool' (on CSP website <a href="http://www.civilservicepension.org.uk">www.civilservicepension.org.uk</a>).</li> <li>2) Undertakes CSP13 (Estimate) action, where appropriate (Section 4.3 refers). Follows up cases with the Scheme Administrator, where appropriate (the tool will indicate).</li> <li>3) Where rejoiner has "quarantine period", ask the Scheme Administrator for quarantine end date. Make sure you include this date in the LOA to the member.</li> <li>4) Issues LOA using appropriate text from Annex B as indicated by Joiner Tool.</li> <li>5) Email the New Starter Pack from the Joiner Tool. Where email is not an option then order the New Starter Pack from the Scheme Administrator (Capita) using the New Starter Pack Request spreadsheet.</li> <li>6) Defaults re-joiner into appropriate scheme ensuring correct contributions are applied by payroll.</li> </ol>	<p>Within five working days of receiving completed questionnaire.</p> <p>CSP13 (Estimate) action must be completed and new entrant informed of abatement effect at the earliest opportunity so that they can decide whether or not to accept the post.</p> <p>Where abatement may apply, timing will be dependent on the completion of the CSP 13 (Estimate) action.</p> <p>Where the rejoiner has a quarantine period, you must get the information from the Scheme Administrator and pass it to the member as soon as possible so they can decide whether or not to accept the post.</p>

Process Owner	Trigger points and pension actions	Service Standard/timeliness of completed action
Scheme Administrator	Checks and collates requests and orders packs from the print supplier. <b>This only applies if you are requesting a printed new starter pack to be sent by post.</b>	Within 48 hours of making decision to appoint.
Print provider	Dispatches Starter Pack to new entrant. <b>This only applies if you are requesting a printed new starter pack to be sent by post.</b>	Within 48 hours of receiving order.
New entrant	Reads pack and completes Pension Choices form. Sends details to employer, as per address on form.	Within three months of start date (if applying for <b>partnership</b> , or opting out, new entrants must return their form within one month if they wish their choice to be backdated to their first day).
Employer (if Choice form is returned to employer)	<p>If rejoiner chooses the scheme they are eligible for (according to their pension choices), forward form to the Scheme Administrator as they will already have been enrolled.</p> <p>If the rejoiner chooses <b>partnership</b>, follow actions given in Employers' Pension Guide, Section 4.2. 'Unscramble' contributions, as appropriate.</p> <p>If new entrant wishes to opt out, follow the action in 4.1.52 (also detailed in Annex 5D) and send the Pensions Choices form to the Scheme Administrator.</p>	<p>Before next available pay run date.</p> <p>Before next available pay run date.</p>
Scheme Administrator	Process Pension Choices form as agreed with employer and in line with the Scheme Manager (Cabinet Office), procedures and set up any required pension action (as detailed in 4.1.52 and Annex 5D).	Within five working days of receiving form.

