



GREATER
MANCHESTER
COMBINED
AUTHORITY



in Greater Manchester



**Greater
Manchester
Health and
Social Care
Partnership**

**Completing the Contract
Allocation Form- step by step guide**

Details needed on your CAF form as shown in the guidance notes.

Please note you do not have to type in no's 1,6,7,10,11,15 and 17 on the form as they are either drop down boxes or will be automatically filled.

1. **Drop down box** – select the area team your contract lies with.
2. Insert **name** of practice/name of contract holder
3. Insert **address** of practice
4. Insert **contract number** ie 000000/000 or 00000000000
5. Show the **total contract value** ie £100,000

1

6. **Automatic fill – do not overtype.** Maximum net pensionable pay @ 43.9% of the contract -
7. **Drop down box** - Reason for adjustment
8. In this column list all the **performers names** who are currently on your contract (you can look on Compass to see who is still attached)
9. Add the unique **performer number** against each name
10. **Drop down box** to select 'yes' or 'no' to say if each performer is superannuable
11. **Drop down box** to chose the **type of employment** e.g. Self employed
12. and 13. The '**Date From**' and '**Date To**' should be somewhere between **1st April** of the current financial year to **31st March** of the following year.

2

14. Estimated NPE/NPEE – this column needs to show the NET pay given to each performer for either the full year or for the whole period of time they will work on the contract in that financial year whether they are pensionable or not?

15. Automatic fill – do not overtype.

16. Please enter the signature of person taking responsibility for the changes

17. **Drop down box** – select the title of the signatory.

3

A few basic points to follow that will always apply when completing the CAF form

4

2. We only need the finance information for this current financial year.

5

3. A 'CAF' form must always accompany a 'Notification of Change form'.

6

- Please name ALL the performers on the CAF who work or have worked on your contract throughout the current financial year.

7

- All performers on the CAF form need to have an allocation whether they are in the pension scheme or not.

8

- The provider has a statutory duty to allocate the 43.9% of the contract value to all the performers who are working at the practice (as per the 2015/2016 GDP pension guidance) They then have to provide the NET pension for each performer (estimated) in column G.

9

Example – taken from GDP Pensions Guide V4 (05.2016)

A performer has completed 6,000 UDA's in the year at an agreed value of £20.00 per UDA. Their practice agreement requires them to pay £10.00 per UDA as surgery contributions together with 50% of their lab fees, bad debts, statutory levy and a contribution to the hygienist.

10

Performers pensionable pay

6,000 UDA's @ £20 £120,000.00

Less surgery contribution

£10 @ 6,000 £60,000.00

50% lab charges £3,000.00

50% bad debts £350.00

50% statutory levy £50.00

Hygienist £500.00

£63,900.00

Therefore the performers net pensionable pay to put in column G is £56,100.00 (this needs to be pro-rated if they don't work over the full financial year).

11

- The allocation needed in column G is the **NET** pensionable pay for the year whether the performer is pensionable or not and tiered contribution rates will be based on this figure.

12

Therefore details of the net pay for every performer who works on a contract throughout the year should be shown on each CAF form

Eg At the beginning of the year you have 3 performers and you expect them to work the full year, then you would need to put the NET pensionable earnings for each of them in column G so you would complete the form like this

Name	Number	Superann?	Type	From	To	Net
Joe A	111111	Y	salaried	01/04/16	31/03/17	£?????
Ann B	222222	Y	self empl	01/04/16	31/03/17	£?????
Julie C	333333	N	self empl	01/04/16	31/03/17	£?????

13

If then Julie C decides to leave and you have found another performer (Nick D) to take their place you, would have to complete a notification of change form to inform us of the new addition and also the date Julie C will leave your practice. You would also need to send in an updated CAF form which would then look like this

Name	Number	Superann?	Type	From	To	Net
Joe A	111111	Y	salaried	01/04/16	31/03/17	£????
Ann B	222222	Y	self empl	01/04/16	31/03/17	£????
Julie C	333333	N	self empl	01/04/16	15/06/16	£????
Nick D	444444	N	self empl	18/06/16	31/03/17	£????

14

Later on you have another change as Ann B decides to leave and you replace her with another performer Gail E), so you would provide an end date for Ann on a notification of change form along with the start details of the new performer. On the CAF you would pro-rata Ann's pay to show what has been her full pay for this financial year, therefore your CAF form will now look like this

Joe A	111111	Y	salaried	01/04/16	31/03/17	£????
Ann B	222222	Y	self empl	01/04/16	31/09/16	£????
Julie C	333333	N	self empl	01/04/16	15/06/16	£????
Nick D	444444	N	self empl	18/06/16	31/03/17	£????
Gail E	555555	Y	salaried	01/10/16	31/03/17	£????

Please note that all the performers who have worked on the contract in that financial year (even if they have left), will still need to be shown on the CAF form as this is a history of contract value over the full financial year.

15

The remainder of the 43.9% of the contract value is then pensionable against the Provider/Providers unless they are a limited company or a body corporate.

16

If you take on an individual to fill a locum position eg to cover a short term illness of another performer and the locum is paid £250.00 a session covering ten sessions in total, then the locum's net pensionable pay that must be declared on the ARR is £2,500.00 (10 x £250.00)

17

FYI If you have further queries in
regard to completing this form
please note the details of the finance
team below

Amirula Alum	011382 49245
Christine Revens	011382 50566
Catherine Key	011382 55152
Anthony Doggett	011382 50935
Lindsay Ormston	011382 55231
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18