

NHS Pensions Update – August 2021

Welcome to the August 2021 NHS Pensions Employer Update.

Sharing our performance

Table 1- Total Transactions (July 2021)

Item	Volume
Total Transactions	111,984
First retirements	6,796
Estimates	3,035
Annual allowance	5,283
Ill health applications	570
AP/ERRBO/AVC	2,883
Bereavements	6,592
Transfers	3,097
Nominations	2,135
Pensions On Divorce	1,979
Protection of Pay	174
Refunds	1,667
Revised retirements	3,006
Service	2,853
Inbound processing	6,629
Data support	48,365
Pensioner admin	16,920

Table 2 - First Retirements and Pensioners (July 2021)

Item	Volume
Applications Processed	6,796
On Time	99.5%
Amount paid in Lump Sums	£233,687,455.55
Amount of Pension Paid	£830,913,529.70
No. Pensioners in Payment	1,026,568

Table 3 - Employer Helpline statistics (July 2021)

Item	Volume
Total Volume Calls	3,020
Average Handling Time (s)	450
Average Speed of Answer (s)	97

Table 4 - Member Helpline statistics (July 2021)

Item	Volume
Total Volume Calls	26,933
Average Handling Time (s)	590
Average Speed of Answer (s)	60

From May 2021 we have amended the way in which we report transactional values to include all events across the Scheme and all transactions completed for each function, up to and including the actual event itself. This change has been made to provide a more comprehensive overview of transactional volumes on a month-by-month basis.

TRS and Annual Benefits Statement refresh

TRS and Annual Benefit Statements will be made available by the end of August 2021 and the mid-year refresh will be available in December 2021.

The employer contributions increased with effect from 1 April 2019 from 14.38% to 20.68%. You were informed that the increase was centrally funded and so not paid directly by you.

As a result of this arrangement the increased payments will not be included in any of the total employer annual contribution figures on member TRS and Annual Benefit Statements this year. However, the value of employer contributions has no impact on the standard benefits as quoted within member statements. This includes those of you that have been invoiced and paid a percentage of the increase.

We will let you know when the statements are available.

Death in Service process reminder

A reminder to all employers that the Death in Service process is changing from 1 September 2021.

A new Death in Service Notification Form will be available on the website for this date and will replace the AW9, AW11 and AW158 forms that you currently use. The new form is to be used for all new notifications of death in service from 1 September. Employers should cease paying initial survivor pensions from this date as NHS Pensions will pay these in all cases.

Please refer to the July Employer Update for further information.

New NHS Pensions webpages on government changes to public service pension schemes

We have launched a new area of our website focusing on the government changes to public service pension schemes as a result of the introduction of transitional protection - sometimes known as the McCloud judgment.

The [webpages](#) include a new introductory video on the changes, a factsheet to support members to understand if they are affected and what the changes mean, and a glossary of commonly used terms.

New information will continue to be added to the webpages and our [FAQs on Knowledge Base](#) as this becomes available. There is also dedicated page for employers that further content will be added to over time.

Changes to Final Pay Controls and how to apply for retrospective charges to be reassessed

The Department of Health and Social Care (DHSC) recently published the outcome of its consultation on proposed amendments to the NHS Pension Scheme Regulations which confirmed changes to final pay controls from the 1 July 2021.

These changes are being applied retrospectively to final pay control charges since 1 April 2018 – this means you can ask for any final pay control charges since this date to be reassessed.

The deadline for applications is 31 December 2021.

Read more on the changes and how to apply at: [Changes to final pay controls and how to apply for retrospective charges to be reassessed](#)

Additional practice Manager Events – Level 1

The NHS Pensions Stakeholder Engagement Team are running additional GP practice manager events in September 2021 delivering educational training tailored for practice managers. These events will be delivered virtually via Microsoft Teams.

Practice managers will need to attend two consecutive training sessions. The second session needs to immediately follow the first. For example, if you select to attend Wednesday 1 September Level 1 Part 1, you must also select Thursday 2 September Level 1 Part 2. Only after the two consecutive sessions have been attended will you receive a Continued Professional Development (CPD) accreditation.

There are 2 training sessions:

- GP Practice Manager Event Level 1 Part 1
- GP Practice Manager Event Level 1 Part 2

Level 1 Stakeholder GP Practice Manager Events will take place on the following dates:

GP Practice Manager Event Level 1, Part 1

Wednesday 1 September 13:00 - 15:00

This session includes NHS Pension Scheme website, Annual Benefit Statements and roles and responsibilities.

Link to Eventbrite: [Level-1-Part-1](#)

GP Practice Manager Event Level 1, Part 2

Thursday 2 September 13:00 - 15:00

This session includes POL, AW8 and the member journey.

Link to Eventbrite: [Level-1-Part-2](#)

GP Practice Manager Event Level 1, Part 1

Monday 6 September 13:00 - 15:00

This session includes NHS Pension Scheme website, Annual Benefit Statements and roles and responsibilities.

Link to Eventbrite: [Level-1-Part-1](#)

GP Practice Manager Event Level 1, Part 2

Tuesday 7 September 13:00 - 15:00

This session includes POL, AW8 and the member journey.

Link to Eventbrite: [Level-1-Part-2](#)

If you register and then are unable to attend, please let us know as soon as possible so that we can reallocate your ticket. We will charge you for non-attendance if you do not let us know at least 24 hours before the event.

GP Practice Manage Events – Level 2

The NHS Pensions Stakeholder Engagement Team will start delivering NHSBSA Pensions Level 2 GP Administration events for Local Administration of the NHS Pension Scheme from September.

The events will provide educational training tailored for practice managers and will be delivered virtually via Microsoft Teams.

Practice managers will need to attend two consecutive training sessions. The second session needs to immediately follow the first. For example, if you select to attend Monday 13 September Level 2 Part 1, you must also select Tuesday 14 September Level 2 Part 2. Only after the two consecutive sessions have been attended will you receive a Continued Professional Development (CPD) accreditation.

There are 2 training sessions:

- GP Practice Manager Event Level 2 Part 1
- GP Practice Manager Event Level 2 Part 2

Level 2 Stakeholder GP Practice Manager Events will take place on the following dates:

GP Practice Manager Event Level 2, Part 1

Monday 13 September 13:00 - 15:00

This session includes **Roles and Responsibilities / Pensions Online**

Link to Eventbrite: [Level-2-Part-1](#)

GP Practice Manager Event Level 2, Part 2

Tuesday 14 September 13:00 - 15:00

This session includes **Ill Health and Family Benefits / Flexible Retirement**

Link to Eventbrite: [Level-2-Part-2](#)

GP Practice Manager Event Level 2, Part 1

Wednesday 15 September 13:00 - 15:00

This session includes **Roles and Responsibilities / Pensions Online**

Link to Eventbrite: [Level-2-Part-1](#)

GP Practice Manager Event Level 2, Part 2

Thursday 16 September 13:00 - 15:00

This session includes **Ill Health and Family Benefits / Flexible Retirement**

Link to Eventbrite: [Level-2-Part-2](#)

If you register and then are unable to attend, please let us know as soon as possible so that we can reallocate your reserved place to the next available person.

If your organisation would like to request training/attendance directly from the Stakeholder Engagement Team, please complete the event / meeting request form available on our Stakeholder Engagement Team webpage and email the team for consideration:

nhsbsa.stakeholderengagement@nhs.net

The NHS and Social Care Coronavirus Life Assurance Scheme 2020

Information on the government's life assurance scheme for eligible frontline health and social care workers during the coronavirus (COVID-19) pandemic can be found on the NHSBSA website via www.nhsbsa.nhs.uk/coronavirus-life-assurance-2020

Take a look today and make sure you understand your responsibilities as an employer in helping to communicate the scheme to staff, support bereaved families to make a claim and oversee their claims process.

Employer easements for acceptance of forms and documents

At the start of the coronavirus outbreak in 2020 we introduced a number of easements and contingency measures to support employers with local administration of the NHS Pensions Scheme.

Following feedback from employers, we have decided to make some of these easements permanent, including:

- Accepting employer forms by email

- Accepting supporting documents submitted by an employer by email

Employers can email copies of employer forms or scanned images of original supporting documents, including marriage certificates or birth certificates, to nhsbsa.pensionscanquery@nhs.net

When sending supporting documents by email, you must confirm that you have verified the scanned certificate in the main body of your email.

All forms should be signed as appropriate according to the instructions on the form.

We will be removing the webpage about these easements in the coming days and we will update our guidance to reflect the new, permanent changes.

2019 / 2020 Pensions Annual Allowance Charge Compensation Policy

Both NHS England and NHS Improvement (NHSEI) and NHS Wales have published guidance on their respective 2019/20 Pension Annual Allowance Charge Compensation policies, including an application form for eligible clinicians to apply for the scheme and information on the actions that employers now need to take.

It follows the NHSEI and NHS Wales announcements at the end of 2019 that clinical staff who go over their annual allowance for the 2019/20 tax year and who use Scheme Pays to pay the tax charge can be compensated in retirement for any reduction to their NHS Pension Scheme benefits.

You can find resources for employers, downloadable application forms and details of how to confirm eligibility on the NHSEI website if you're based in England, or the NHS Confed website if you're based in Wales:

- PAACCS information for England: www.england.nhs.uk/pensions/
- PACCS information for Wales: www.nhsconfed.org/NHSPensionsWales

PCSE is accepting forms from GPs for endorsement in application windows. The current GP application window is open till 1 October 2021.