

NHS Pensions Update – March 2022

Welcome to the March 2022 NHS Pensions Employer Update.

Sharing our performance

Table 1- Total Transactions (February 2022)

Item	Volume
Total Transactions	135,464
First retirements	6,500
Estimates	3,359
Annual allowance	3,799
Ill health applications	579
AP/ERRBO/AVC	828
Bereavements	6,775
Transfers	3,488
Nominations	2,116
Pensions On Divorce	1,817
Protection of Pay	150
Refunds	1,513
Revised retirements	4,165
Service	3,817
Inbound processing	5,623
Data support	71,776
Pensioner admin	19,159

Table 2 - First Retirements and Pensioners (February 2022)

Item	Volume
Applications Processed	6,500
On Time	99.73%
Amount paid in Lump Sums	£171,242,204.71
Amount of Pension Paid	£849,759,809.85
No. Pensioners in Payment	1,049,324

Table 3 - Employer Helpline statistics (February 2022)

Item	Volume
Total Volume Calls	3,125
Average Handling Time (s)	567
Average Speed of Answer (s)	75

Table 4 - Member Helpline statistics (February 2022)

Item	Volume
Total Volume Calls	21,279
Average Handling Time (s)	657
Average Speed of Answer (s)	889

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.

Non-Pensions Online (POL) annual update

All employing authorities (EAs) are required to submit end of year information to NHS Pensions on an annual basis. You must submit this information to NHS Pensions by 31 May.

If you use Pensions Online (POL) you should submit this year end information via POL.

For non-POL employers, the Data Management Team will send a prepopulated spreadsheet to the main EA contact week commencing 14 March 2022. The spreadsheet will be partially prepopulated for all members where an annual update should be submitted.

Once the spreadsheet has been received, employers will receive an email from the data team to confirm receipt, this will be sent within five working days. If you do not receive the confirmation email you should contact the employer helpline 0300 3301 353. The data team will then contact you directly to resolve this issue.

The data team will work with employers to resolve any errors arising from the annual update before the annual benefit statement cut-off date. Dates on the cut off are to be confirmed.

Spreadsheets incorrectly completed will be returned for correction and the data will not be processed until the amended information is received.

Any spreadsheets received after 31 May 2022 will be worked on a best endeavours basis. The data team are unable to commit to these being completed prior to the cut off. Comprehensive guidance notes will be made available to all employers.

The Stakeholder Engagement Team are hosting a virtual training event via Microsoft Teams for all Non-POL employers on the 16 and 17 March 2022.

The event will focus on how to complete the annual return and highlight the common errors usually made, to ensure the accuracy of the information.

GP Locum 10-week rule

Due to the Coronavirus (COVID-19) pandemic, we temporarily removed the 10-week rule for GP locums from 1 April 2022. The rule states that GP locums cannot pension work that is over 10 weeks old.

We will be reinstating the rule from 1 October 2022. Please ensure that any GP Locum forms are submitted prior to this date as late forms will not normally be accepted. Further information can be found on our [website](#).

Total Reward Statement refresh

The annual Total Reward Statement refresh is set to commence with the data cut being taken after close of business on the 17 June 2022. If the process goes to plan, the aim is for the statements to be made available mid-August as usual. We will confirm the exact refresh date nearer the time.

Department of Health and Social Care announces extension of retire and return easements

Following a short consultation, the Department of Health and Social Care has announced an extension to retire and return easements to 31 October 2022 via temporary amendments to NHS Pension Scheme regulations.

What was included in the consultation?

The Department of Health and Social Care proposed a continuation of the temporary easements which were introduced by [section 45 of the Coronavirus Act 2020](#) beyond the current expiry on 24 March 2022 to 31 October 2022.

The agreed extension will take effect from 25 March 2022 to ensure the continued suspension of NHS Pension Scheme regulations following the expiry of section 45 on 24 March 2022. The 'retire and return' easements will now continue until 31 October 2022.

The amendments to the NHS Pension Scheme regulations will continue the temporary suspension of:

- the 16-hour rule in the 1995 section
- abatement of special class status members who retire and return to work between age 55 to 60 in the 1995 section
- abatement of draw-down members who claim a portion of their benefits and continue working in the 2008 section and 2015 scheme

These easements allow retired and partially retired staff to return to work in the NHS or increase their working commitments without having their pension benefits suspended or reduced.

You can find more information on the current easing of retire and return restrictions on our [COVID-19 guidance on support for retired members page on the NHS Pensions Pensioner hub](#).

Updates on what we're doing to support you

In November 2021 we contacted all pensioner members who have:

- Retired and returned to work
- Chosen to draw down part of their benefits

This was to tell them that the temporary suspensions will be ending and we'll return to normal arrangements from 25 March 2022. We have since written to the same pensioner members to inform them of the proposed changes to allow easements to continue to 31 October 2022.

We will write to affected members again over summer, and we will provide their earnings margin ready for 1 November 2022.

You can read the [full consultation outcome on Department of Health and Social Care's website here](#).

2022/23 Estimate of Pensionable Income - GP practices and APMS contractors

The Estimate of Pensionable Income form for 2022/23 is now available on the [practitioner webpage](#), located in our Member Hub. We are sorry for the delay in publishing, this was due to us awaiting the outcome of DHSC's consultation on changes to member

contributions. The deadline for submission of the form has therefore been extended to 31 March 2022.

Every GP practice (GMS and PMS contractor) and APMS contractor (that qualifies as an APMS employing authority) must submit the estimate form to NHS England/Primary Care Support England or to the Local Health Board if in Wales no later than 31 March 2022.

If it is not received by then there may be a delay in collection of contributions.

For GP surgeries and APMS contractors in England, we encourage the use of PCSE Online for submission of the form by 31 March 2022 to ensure that contributions are collected promptly and at the correct estimated rate in April. [You can log in to PCSE Online using this link.](#)

A separate estimate form must be completed in respect of every contract even where a GP provider may be a party to several contracts.

Where a non-GP provider is a party to several contracts, they can only pension income from one contract and therefore are listed on one form only.

New guidance to be shared with members who may hold or have held enhanced or fixed protection from lifetime allowance charges

Following new [HMRC guidance for public service scheme members with enhanced or fixed protection](#) which was issued on 28 February 2022, we have made some amends to our [lifetime allowance webpage](#).

The guidance relates to members who will be affected by the changes to public service pension schemes as a result of the McCloud judgment **and** may hold or have held enhanced or fixed protection from lifetime allowance charges.

Please encourage any members who may hold or have held enhanced or fixed protection from lifetime allowance charges, to read [this information](#) as soon as possible before 31 March 2022.

The guidance can be found in the section titled '*Closure of the 1995/2008 Scheme and the move to the 2015 Scheme*' our [lifetime allowance webpage](#).

More information on which members will be affected by the changes to public service pension schemes as a result of the McCloud judgment can be found on our [changes to public service pensions web hub](#).

Reminder POL data cleanse and error handling

We would like to remind employers to regularly check Pensions Online (POL), employer error handling and clear any employer allocated errors.

There are currently 158,000 data errors allocated to employers. These errors potentially prevent your member from obtaining up to date pension information and will create further errors when you submit your year-end updates or any other data.

Please take action to clear any errors allocated to you as soon as possible and check your POL ADP4 or Non updated years, to identify missing 2021 year-end updates.

There are currently 36,000 data errors allocated to NHS Pensions. The Data Management Team (DMT) continue to work on resolving these and will contact you if further information or action is needed. You do not need to email DMT about these, unless you have information that will assist in clearing the error.

Revised benefits - progress update

We are on track to clear all straightforward revised benefits by April 2022.

There will be some that will fall out for manual intervention due to either complex membership or require manual calculation. These will take longer and we ask that you to bear with us as we work through them.

31 March 2022 deadline approaching for 2019/20 Pension Annual Allowance Charge Compensation Scheme

The 31 March 2022 deadline for eligible clinicians to submit an application to the NHS England and Improvement (NHSEI) or NHS Wales 2019/20 Pension Annual Allowance Charge Compensation Scheme is approaching.

To apply to the Scheme, eligible clinicians and their employers need to complete an application from.

The application form and information on how to apply can be found on the [NHSEI website](#) for clinicians in England, and on the [NHS Confed website](#) for clinicians in Wales.

GPs in England need to submit their application to Primary Care Support England (PCSE). PCSE asked for applications to be submitted by 11 February to allow time for them to process forms before 31 March 2022. Applications received after 11 February 2022 will be

held and processed by PCSE at a later date. PCSE and NHSEI will share more information on timings for this soon.

We've recently written to members who we believe may have an annual allowance charge for 2019/20 and may be eligible to apply for the scheme to remind them of the deadlines.

Eligible members must pay the tax charge with scheme pays

To apply for the Scheme, members must use scheme pays to pay their tax charge. To do this, they need to make a scheme pays application, using the scheme pays election (SPE2) available on our website www.nhsbsa.nhs.uk/member-hub/annual-allowance.

The deadline for submitting a voluntary scheme pays election to the NSHBSA is also 31 March 2022.

If an eligible member doesn't have a pension savings statement or can't accurately calculate their annual allowance charge, they should submit an estimated scheme pays election

This will need to be received by 31 March 2022. Their estimated scheme pays election can then be updated at any point up to 31 July 2024.

Update on DHSC's proposed changes to member contributions

In February we informed you that the Department of Health and Social Care (DHSC) has published the response to its consultation on proposed changes to the NHS Pension Scheme member contribution tiers and rates.

The response confirms that the changes will now be implemented from **1 October 2022**.

You can read the consultation response via: [NHS Pension Scheme: proposed changes to member contributions: consultation response - GOV.UK](https://www.gov.uk/government/consultations/nhs-pension-scheme-proposed-changes-to-member-contributions-consultation-response)

Information for your payroll provider

In November we asked you to share information on the proposed changes with your payroll provider to allow them time to prepare ahead of 1 April 2022, which was the date proposed by DHSC in the original consultation.

Please can you ensure that your payroll provider is aware of the consultation response and that changes will be implemented from 1 October 2022.

These changes must not be put in place for 1 April 2022.

We are working with colleagues at DHSC to confirm if the change of date will have any impact on the requirements document we circulated in November and we will be back in touch once this is confirmed with more information.

If your payroll provider is ESR, they have already been informed of the consultation response and the revised implementation date, so you don't need to let them know.

Employer guides and resources – what's new

The Stakeholder Engagement Team has created a number of new guides and resources from your feedback which you can find on the Employer Hub.

User guides

- New ill health guide
- New employer organisation contact details form

Learning video

- New 'Using the NHS Pensions employer hub'

We're updating and creating more guides and videos as the system is continually improved which will be available on the [Employer Hub](#).

Reminder - Administration Foundation Course

This is a reminder for anyone interested in the Administration Foundation Course which is available over two dates in April.

Dates:

- Wednesday 27 April 2022 between 1pm and 3pm – visit the [Eventbrite link](#) to book a place
- The course will be repeated on Thursday 28 April between 1pm-3pm – visit the [Eventbrite link](#) to book a place

The foundation course has been developed following feedback from our GP practice manager employer training events.

This course is available to all new local administrators of the NHS Pension Scheme with less than 12 months in post. It provides a high-level overview of what is expected of you as an NHS Pension administrator throughout a scheme year.

At the end of the course, you will have a high-level understanding of the actions required to enable you to administer the NHS Pension Scheme at a local level. The course could also be used as a high-level refresher course for anyone restarting in local NHS Pension Scheme administration.

The foundation course is available to all employer types of the NHS Pension Scheme.

Additional May 2022 level 1 GP practice manager training dates

We've announced an additional Level 1 GP practice manager training event in May 2022 presenting educational training tailored for practice managers.

The event will be delivered virtually via Microsoft Teams and is in two parts. The second session needs to immediately follow the first. If you select to attend Tuesday 17 May Level 1 Part 1, you must also select Wednesday 18 May Level 1 Part 2.

Only after the two consecutive sessions have been attended will you receive a Continued Professional Development (CPD) accreditation.

GP Practice Manager Event Level 1, Part 1

Tuesday 17 May - 1pm to 3pm

This session includes NHS Pension Scheme website, Annual Benefit Statements and roles and responsibilities. The link to Eventbrite will be available to register in April's update.

GP Practice Manager Event Level 1, Part 2

Wednesday 18 May - 1pm to 3pm.

This session includes POL, AW8 and the member journey and the link to Eventbrite will be available in April's Employer Update.

Additional April 2022 GP practice manager level 2 training dates

We've announced an additional Level 2 GP practice manager event in April 2022, presenting educational training tailored for practice managers.

The event will be delivered virtually via Microsoft Teams and is in two parts. The second session needs to immediately follow the first. If you select to attend Wednesday 6 April Level 2 Part 1, you must also select Thursday 7 April Level 2 Part 2.

Only after the two consecutive sessions have been attended will you receive a Continued Professional Development (CPD) accreditation.

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

GP Practice Manager Event Level 2, Part 1

Wednesday 6 April – 1pm to 3pm.

This session includes roles and responsibilities and flexible retirement.

[Link to Eventbrite.](#)

GP Practice Manager Event Level 2, Part 2

Thursday 7 April – 1pm to 3pm.

This session includes leave overview, ill health and family benefits.

[Link to Eventbrite.](#)

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.ne

Free webinar on pension scams

On Wednesday 30 March, The Pension Regulator (TPR) will be holding a [pension scams webinar](#) which will cover a range of topics including the evolving scams landscape, information about the transfer request regulations introduced last November, updates to the [‘Pledge to combat pension scams’](#) and an update from the Pension Scams Industry Group (PSIG). There will also be a live Q&A session with our panel of experts, chaired by Nicola Parish, TPR’s Executive Director of Frontline Regulation.

We’d like to reach as many organisations as possible for this event, so we’d really appreciate any support you can give us by sharing some suggested posts and images with your audiences.