

NHS Pensions Update – May 2022

Welcome to the May 2022 NHS Pensions Employer Update.

Sharing our performance

Table 1- Total Transactions (April 2022)

Item	Volume
Total Transactions	179,284
First retirements	8,952
Estimates	3,720
Annual allowance	5,077
Ill health applications	644
AP/ERRBO/AVC	1,001
Bereavements	6,464
Transfers	871
Nominations	2,377
Pensions On Divorce	540
Protection of Pay	112
Refunds	465
Revised retirements	2,619
Service	3,244
Inbound processing	5,033
Data support	120,769
Pensioner admin	17,396

Table 2 - First Retirements and Pensioners (April 2022)

Item	Volume
Applications Processed	8,701
On Time	99.82%
Amount paid in Lump Sums	£302,835,553.78
Amount of Pension Paid	£882,278,051.34
No. Pensioners in Payment	1,057,814

Table 3 - Employer Helpline statistics (April 2022)

Item	Volume
Total Volume Calls	3,273
Average Handling Time (s)	535
Average Speed of Answer (s)	92

Table 4 - Member Helpline statistics (April 2022)

Item	Volume
Total Volume Calls	23,212
Average Handling Time (s)	628
Average Speed of Answer (s)	707

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 – deadline approaching

All employing authorities (EAs) are required to submit end of year information to NHS Pensions on an annual basis. Our Data Management Team sent the prepopulated spreadsheet to the main EA contact in March. This has been partially prepopulated and will include details for all members where we believe an annual update should be submitted. Organisations have until 31 May 2022 to submit this information to NHS Pensions.

Annual allowance information deadline date

Employers are required in legislation to provide information to NHS Pensions which enables pension savings statements to be provided to members. This statement informs members whether they have exceeded the annual allowance limit in the NHS Pension Scheme.

The requirements specify that employers must provide pay (and membership) information to NHS Pensions by 6 July following the end of the tax year.

We are expecting an influx of requests for annual allowance statements in July. In order to be able to respond to these requests, we must have the available pay and membership information from employers for 2021/22 by 6 July 2022 (information for previous years should already have been received). If the member's record is not updated by the employer by this date, HM Revenue and Customs (HMRC) may impose fines and charges on employers of:

- up to £300 per member, and
- £60 per day per member until the member's records are updated.

If the information is not provided, we will not be able to conduct the necessary calculations to check whether the member has exceeded the annual allowance limit. We will not be able to generate a pension savings statement and notify potentially affected members in a timely manner. Members could be subject to fines and late payment penalties from HMRC.

Special arrangements were made for PCSE/NHS England in relation to the provision of information for GPs once their end of year certificates have been received and the provision of pension information to NHS Pensions after HMRC's deadline.

Final pay controls reassessment update

The final pay controls (FPC) team received 1,416 applications for reassessment, with 881 of these received in December 2021 alone.

The team have completed 60% of all reassessments received so far and are working hard to complete the remainder as soon as they can. The team are working through the reassessments in strict date order and are currently working on those received on the 17 December 2021. A further update will be provided on the status of the exercise in a future newsletter to keep you informed of our progress.

Please do not contact the team for updates on your applications, they will contact you directly, once they have an update.

FPC new process reminder

All final pay control charges calculated on or after 1 July 2021 have been calculated to take into account the revised CPI percentage and new exemptions and therefore are not included as part of the reassessment process.

If your organisation has any final pay control charges after this date, please ensure that you make the payments within 30 days of receiving the invoice. If the invoices are not paid within the time limit, administration and interest charges will continually be added and will not be waived.

FPC1 form reminder

As part of the retirement process, employers are reminded that if they think a member is going to have a final pay control charge to ensure that the FPC1 Form is submitted at the same time as the application for benefits.

FPC and McCloud

The calculation of new final pay control charges has been paused for any retirements in April due to the transition of members from the 1995/2008 Scheme which closed on 31 March 2022 to the 2015 Scheme as of 1 April 2022. This is to prevent the double processing and issuing of invoices until the sub awards have been processed for these cases.

Please note, once you receive these invoices, the deadline for payments will be the 30 days from the date of the invoice.

Additional Pension applications

We are receiving a high volume of incomplete and outdated forms for additional pension.

Can all employers ensure that they are directing members to the [additional pension calculator](#) on the additional pension webpage of the Member Hub.

All employers must ensure that the members section has been filled in correctly before submitting the application to NHS Pensions.

Ill Health Applications

When sending NHS Pensions the ill health retirement application form and any supporting medical evidence, ensure these are sent to us as soon as possible.

This is particularly important for members who receive a terminal diagnosis. Sadly, NHS Pensions have received some late ill health retirement applications, when a member has suddenly deteriorated and sadly passed away and their application was not received in time to process.

Instances such as this where the member has not ceased employment for pension purposes, will result in death in service payment. If the member has already ceased pensionable employment this will result in either a death within 12 months or death in deferment payment.

Escalation processes

This is a reminder that the Stakeholder Engagement Team email account is only to be used for escalations of serious ill health cases.

For all other escalations, please contact the employers email account or helpline in the first instance.

If they are not able to resolve your issue in the first instance they will refer directly to the relevant team or to Stakeholder Engagement to resolve.

The Stakeholder Engagement Team are still able to be contacted for:

- meetings and forums requests
- educational needs
- website and Ask Us clarification

The Greenbury query window closes on the 31 July 2022

For any employers that have Greenbury queries, please ensure that these have been submitted by 31 July 2022. Any queries received after this date will not receive a response.

Greenbury requests for senior managers who have opted out of the NHS Pension Scheme and are in active employment.

We understand that employers have been receiving disclosure requests, or queries, from the National Audit Office for members that have opted out of the NHS Pension Scheme.

The Group Accounting Manual (GAM) specifies pension figures for disclosure purposes should 'include those benefits accruing to senior management from membership of the NHS Pension scheme'.

An individual who has opted out of the scheme for the whole year has not accrued pension benefits therefore no pension figures will be supplied.

A narrative should be added to the accounts to explain, the GAM AT 3.1555 suggests the following: 'Name of individual chose not to be covered by the pension arrangements during the reporting year.'

TRS 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.

Reminder of the Department of Health and Social Care (DHSC) extension of retire and return easements including abatement

A reminder that following a short consultation, DHSC announced an extension to retire and return easements to the 31 October 2022 through temporary amendments to NHS Pension Scheme regulations.

DHSC 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 took 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 continue until 31 October 2022.

The amendments to the NHS Pension Scheme regulations 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

We will write to affected members over summer to provide their earnings margin ready for 1 November 2022. You can read more [here](#).

GP Pension Member Events 2022

NHS Pensions will be hosting GP Pension Member Events soon. Our first events will be held in July, and will cover the following subjects:

- Which GP Certificate? - Covering what certificates need to be completed for a GP to pension their work.
- Journey of a GP Member - A journey through the different types of GPs and what they need to do to pension their work, including information on sick leave, concurrent officer posts and other useful information.
- GP Retirement Process - The processes that GPs should follow when they retire, including information on returning to work when in receipt of an NHS Pension.

Please keep an eye out on the Member Hub and future employer updates for further information on these dates and how to book.

Pensions Online (POL) downtime

POL will be available throughout May, June, and July 2022 between 7am and 7pm apart from the periods noted below for scheduled system maintenance:

- Saturday 21 May - Sunday 22 May
- Saturday 28 May - Sunday 29 May
- Friday 10 June - Sunday 12 June
- Saturday 25 June - Sunday 26 June
- Saturday 30 July - Sunday 31 July

If we do need to bring POL down at short notice for urgent maintenance, we will advise you as soon as we can in advance via the POL homepage.

AW171 Reminder

In June, we advised you that the final phase of the system functionality to automate the AW171 process was complete and advised employers that AW171s are no longer required.

Recently we have seen an increase in the number of e-mails from employers confirming the figures that have been electronically submitted. Once the figures are submitted either on the SD55E or via ESR you do not need to contact us to confirm the amendments.

The only time you need to contact us is for any amendments that cannot be made via the systems, such as the change to the lump sum amount or changes to the reason for retirement. These changes should be e-mailed to nhsbsa.pensionemployers@nhsbsa.nhs.uk and we will raise the request for change on your behalf.

If you have a query relating to the revised amount please use this same email address, and the team will arrange for this to be investigated.

The correct way to access POL

Some employing authorities (EA) have reported receiving a '500 – internal server error' when submitting a SD55/AW8 through Pension Online. This has been investigated and access to POL is not being started from the initial homepage, but through a saved URL/favourites page meaning the process of submitting a SD55/AW8 is being started part way through the process.

Can all employers ensure that they follow the correct way to access POL.

NHS Pensions member events – June dates announced

The NHS Pensions member events aim to help members understand everything you need to know about your NHS pension and how to navigate through the Scheme.

We have a number of events planned throughout the year to help you:

- understand what the NHS Pension Scheme is
- find out all you need to know about your Total Reward Statement and Annual Benefit Statement
- explore your retirement options

You can find links to register for our June 2022 dates on this page.

[Links for our May 2022 events can be found here.](#)

Understanding the NHS Pension Scheme and its benefits

These events allow you to find out how the Scheme works, who's eligible to join and the benefits that you are entitled to.

June dates:

- Tuesday 14 June, 10am: <https://www.eventbrite.co.uk/e/309376281787>
- Tuesday 14 June, 1pm: <https://www.eventbrite.co.uk/e/309379531507>
- Tuesday 14 June, 3pm: <https://www.eventbrite.co.uk/e/309380333907>
- Wednesday 15 June, 10am: <https://www.eventbrite.co.uk/e/309381126277>
- Wednesday 15 June, 1pm: <https://www.eventbrite.co.uk/e/309384085127>
- Wednesday 15 June, 3pm: <https://www.eventbrite.co.uk/e/309384757137>

Your Total Reward Statement and Annual Benefit Statement explained

Your Annual Benefit Statement and Total Reward Statement is your personal wallet to your NHS Pension contributions.

The sessions will cover all you need to know about your Annual Benefit Statement and Total Reward Statement including what it is, how to access it and how to understand your statement.

June dates:

- Tuesday 21 June, 10am: <https://www.eventbrite.co.uk/e/309390614657>
- Tuesday 21 June, 1pm: <https://www.eventbrite.co.uk/e/309391547447>
- Tuesday 21 June, 3pm: <https://www.eventbrite.co.uk/e/309392018857>
- Wednesday 22 June, 10am: <https://www.eventbrite.co.uk/e/309392620657>
- Wednesday 22 June, 1pm: <https://www.eventbrite.co.uk/e/309392961677>
- Wednesday 22 June, 3pm: <https://www.eventbrite.co.uk/e/309393423057>

Your retirement options explained

Whether you are approaching retirement or just starting out in your career within the NHS, planning for your future has never been more important. These sessions aim to provide you with more information on your retirement options, including eligibility for taking a lump sum, as well as much more.

June dates:

- Tuesday 28 June, 10am: <https://www.eventbrite.co.uk/e/309394315727>
- Tuesday 28 June, 1pm: <https://www.eventbrite.co.uk/e/309394827257>
- Tuesday 28 June, 3pm: <https://www.eventbrite.co.uk/e/309395288637>
- Wednesday 29 June, 10am: <https://www.eventbrite.co.uk/e/309395850317>
- Wednesday 29 June, 1pm: <https://www.eventbrite.co.uk/e/309396582507>
- Wednesday 29 June, 3pm: <https://www.eventbrite.co.uk/e/309397053917>

These events are organised by the Stakeholder Engagement Team and they are suitable for all NHS Pension Scheme Members.

Each webinar includes a presentation lasting approximately 40 mins followed by a Q&A session during which you can ask questions. The team may not be able to answer any queries relating to your individual member record but will be able to advise on how to get more information. There's also an opportunity at the end of the sessions to give feedback on the event.

When available, you can register your place through Eventbrite, however you may have some issues opening this if you are using Internet Explorer. Try a different browser, such as Microsoft Edge or Google Chrome to register your place or get in touch with the Stakeholder Engagement Team.

If you require additional support with any of the events or would like to find out more, email the Stakeholder Engagement Team at nhsbsa.memberinbox@nhs.net.

If you're unable to make the event you've registered for, cancel the tickets on Eventbrite so people on the waiting list can use the spaces. You can also keep up to date on the Employer Hub and Member Hub for any new event dates.

New platform for NHS Jobs

A new platform for NHS Jobs has been launched to manage the full recruitment life cycles, from job posting to onboarding successful applicants.

Work on migrating organisations from the current version of the platform has been ongoing for two years, with over 6,600 organisations now successfully on-boarded.

The current platform will be transferred over to the new one after 2022 with work continuing to migrate the final organisations across to the new platform.

A [new brochure](#) has been produced which includes all the benefits of the new service, which you can view on the NHSBSA website under NHS Jobs.

ESR Pensions Event

You are invited to attend a virtual ESR Pensions event hosted jointly with NHS Pensions on 24 May 2022.

The event will run from 10am to 12pm, with a one-hour lunch break followed by the afternoon session from 1pm to 3pm.

Throughout the day we will be covering a number of topics including:

- ESR processing
- ESR Interface
- NHS Pensions Reports
- errors and how to action
- step by step data processing

There will be opportunities throughout the day for question-and-answer sessions with both the NHS Pensions and ESR teams. [You can book your place on Eventbrite.](#)

The link to the Microsoft Teams event will be emailed out the day before the event to everyone who has booked through Eventbrite.

If you have any questions about this event, email nhsbsa.pensionsevents@nhs.net

Administration Foundation Course – June 2022 dates

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 (less than 12 months in post) of the NHS Pension Scheme and 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 of 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 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 and will be available in June on the following dates and times:

- [Wednesday 22 June at 1pm](#)
- [Thursday 23 June at 1pm](#)

Level 1 GP practice manager training dates – July 2022

There are level 1 GP practice manager training events in July 2022 presenting educational training tailored for practice managers.

The events 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 July level 1 part 1, you must also select Thursday 7 July 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

Wednesday 6 July - 1pm to 3pm

This session includes NHS Pension Scheme website, Annual Benefit Statements and roles and responsibilities. The link to Eventbrite can be found [here](#).

GP Practice Manager event level 1, part 2

Thursday 7 July - 1pm to 3pm.

This session includes POL, AW8 and the member journey and the link to Eventbrite can be found [here](#).

June 2022 GP practice manager level 2 training dates

There are Level 2 GP practice manager events taking place in June 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 28 June level 2 part 1, you must also select Wednesday 29 June level 2 part 2.

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

The Level 2 GP Practice Manager events will take place on the following dates:

GP Practice Manager event level 2, part 1

Tuesday 28 June – 1pm until 3pm

This session includes roles and responsibilities and also flexible retirement.

[Link to Eventbrite.](#)

GP Practice Manager event level 2, part 2

Wednesday 29 June – 1pm until 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