

NHS Pensions Update – August 2022

Welcome to the August 2022 NHS Pensions Employer Update.

Sharing our performance

Table 1- Total Transactions (July 2022)

Item	Volume
Total Transactions	117,001
First retirements	9,291
Estimates	5,723
Annual allowance	2,338
Ill health applications	741
AP/ERRBO/AVC	50
Bereavements	7,096
Transfers	1,941
Nominations	1,594
Pensions On Divorce	867
Protection of Pay	11
Refunds	1,707
Revised retirements	2,175
Service	208
Inbound processing	3,766
Data support	63,916
Pensioner admin	15,577

Table 2 - First Retirements and Pensioners (July 2022)

Item	Volume
Applications Processed	9,291
On Time	84.1%
Amount paid in Lump Sums	£259,583,767.03
Amount of Pension Paid	£891,379,115.20
No. Pensioners in Payment	1,069,240

Table 3 - Employer Helpline statistics (July 2022)

Item	Volume
Total Volume Calls	2,949
Average Handling Time (s)	506
Average Speed of Answer (s)	112

Table 4 - Member Helpline statistics (July 2022)

Item	Volume
Total Volume Calls	23,535
Average Handling Time (s)	608
Average Speed of Answer (s)	684

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.

Update on introduction of member contributions changes

Following a consultation earlier this year regarding changes to member contributions that will be implemented from 1 October 2022, the Department of Health and Social Care (DHSC) has recently consulted on proposals for how the pensionable earnings thresholds in the new member contribution structure will be uplifted to account for the Agenda for Change pay increase.

This consultation closed on Friday 12 August at 11.45pm.

[You can read more about the consultation here.](#)

We are awaiting the outcome of the consultation and once DHSC has published its response, we will:

- Share an updated version of the payroll provider briefing pack we shared in June to reflect the outcome of the consultation
- Provide further guidance for employers on the how the changes are being implemented, how we'll be communicating with members and resources you can use
- Update our website to reflect the outcome of the consultation
- Share a copy of the letter that we will be sending directly to all active members before 1 October outlining the changes

A separate letter will be sent to deferred members from 1 October onwards.

As a reminder, the changes to member contributions are being implemented in phases:

- the first phase, including initial changes to the tiers and contribution rates and a move to using actual annual rates of earnings (instead of whole time equivalent) will come into force on the 1 October 2022
- the second phase introducing further amendments to the contribution tiers and rates will take place on a date to be confirmed in 2023
- a final phase could include the aggregation of earnings for multiple part time posts and the removal of a limit on pensionable earnings to whole time hours. This is not expected before April 2024.

Pensions Online (POL) downtime

POL will be available throughout August and September between 7am and 7pm apart from the following dates when there will be downtime for scheduled system maintenance:

- Sunday 21 August
- Saturday 3 and Sunday 4 September
- Sunday 25 September
- Sunday 23 October
- Saturday 29 and Sunday 30 October
- Sunday 20 November

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.

TRS Refresh

Total Reward Statements (TRS) will be made available in late-August. We are in the process of updating our TRS website information and employer resources.

We will let you know when the statements are available.

Ill health applications and guidance for occupational health specialists/ doctors

When sending NHS Pensions an application for entitlement to ill health retirement (Form AW33E) and any supporting medical evidence, please ensure that the form is in sequential order, in the correct orientation and remove any blank pages before scanning and sending to NHS Pensions.

Applications NHS Pensions receive are scanned to the member's record in the order they are received. Ensure that Part A, B and C of the form have been signed. This will ensure that forms are processed promptly.

Ill Health Guidance notes for Occupational Health Specialist/ Doctor

Can employers share with their occupational health specialists/ doctors, that we have [guidance notes](#) on our website to assist them with completing Part C of the entitlement to ill health retirement (Form AW33E).

Changes to annual rate at cessation (ARAC) requests

We have been looking at our process when requesting the annual rate at cessation (ARAC) from employers. As a result, we will no longer routinely request this information where it has already been provided or it is already held on the member's record.

We will still need to request the ARAC from you when:

- we do not hold this information either on the AW8 or members' record
- a revised award is due to change in the LDOS
- there has been a revision due to a pay award which may affect the ARAC and the revised TPP is greater than 5%. If the revised TPP is less than 5% we will use the original ARAC

This will reduce the number of requests we send to you for this type of information.

Reminders when submitting retirement applications

We have seen an increase in the number of retirement applications (AW8s) that have been inputted into POL or submitted incorrectly.

We receive many AW8 forms that have been submitted with either incorrect payable dates or incorrect reasons for retirement. We also receive applications that should not have been submitted electronically, or where we have not received the additional supplementary forms.

When submitting an AW8, make sure:

The member is eligible to claim the benefits selected

When inputting a retirement application into POL, employers have to select which Scheme the member wishes to claim benefits from by entering the relevant payable dates and reason for retirements. Extra care should be taken to ensure the member is eligible for the benefits that are selected at their last day of service.

Do not rely on POL to advise you if a member is eligible for the benefits you have selected or not.

The payable date is shown as the day after the last day of service

We have seen an increase in the number of retirement applications where the payable date and the last day of pensionable service has been recorded as the same date. The payable date must be after the last day of pensionable service.

The actual and NWT TPP figures (where applicable) are input correctly

There have been several cases where these figures have been entered incorrectly in part 2 and part 3 of the AW8.

Any additional information is provided

Any additional information is sent to nhsbsa.polia@nhs.net or nhsbsa.practitioners@nhs.net

If the member is a practitioner, this must be sent immediately upon submission of the AW8.

Where any of the above information is inputted incorrectly or not received this can prevent or delay payment of the members retirement benefits.

Remember you don't need to confirm pensionable pay figures for 1995 members

Recently, we have seen an increase in the number of e-mails from employers confirming pensionable pay figures for 1995 members when it has not been asked on the AW8 during system submission.

Once you have submitted the AW8 through the system on POL, you do not need to tell us the pensionable pay figures for 1995 members.

The only time you need to contact us is for any subsequent amendments that cannot be made through 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 the update on your behalf.

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

Other pension schemes if members opt out of the NHS Pension Scheme

When employees join the NHS, all eligible employees are automatically enrolled into the NHS Pension Scheme. If a member opts-out of the NHS Pension Scheme, you do not need to provide the member with alternative pension arrangements but if you do, this will be a local arrangement by the employer.

Employers should note that The Pension Regulator (TPR) does not allow employers to offer inducements to opt-out of a pension scheme. Employers should refer to the guidance around [safeguarding for workers around automatic enrolment](#).

NHS Pensions' virtual training event for September

The Stakeholder Engagement Team will be hosting a training event via Microsoft Teams for all trusts and employers with ESR. The date of this event has changed to Thursday 22 September 2022.

Further information on the content and how to register for this event can be found on [Eventbrite](#).

NHS Pensions member events – October, November and December dates added

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

We have a number of events planned throughout the year to help them which include:

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

You can find links to register for the member events up to November on the [member hub web page](#).

Administration Foundation Course

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 who are less than 12 months in post and provides an 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 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 the events will be held on Wednesday 24 August 2022 from 1pm until 3pm. [Please visit Eventbrite to sign up](#).

The next course is on Tuesday 11 October at 1pm until 3pm and you can [sign up using Eventbrite](#).

Level 1 GP practice manager event

Our next Level 1 GP Practice Manager events are available in September and October and include educational training tailored for practice managers, delivered virtually via Microsoft Teams.

These sessions include NHS Pension Scheme website, Annual Benefit Statements, roles and responsibilities, Pensions Online (POL), the AW8 and the member journey.

The dates and times for the next sessions are as follows:

- Tuesday 6 September 2022 from 10am to 3pm. [Click here to register](#)
- Thursday 27 October 2022 from 10am to 3pm. [Click here to register](#)

By attending these events you will receive a Continued Professional Development (CPD) accreditation attendance certificate.

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

Level 2 GP practice manager event

Our next Level 2 GP Practice Manager event is available in September and includes educational training tailored for practice managers, delivered virtually via Microsoft Teams.

This session includes roles and responsibilities, flexible retirement, leave overview, ill health and family benefits.

The dates and times for the next session are as follows:

- Thursday 29 September from 10am until 3pm. [Click here to register](#)

Practice managers will need to attend the whole of the training sessions to receive a Continued Professional Development (CPD) accreditation.

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:
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