

## NHS Pensions Update – September 2022

Welcome to the September 2022 NHS Pensions Employer Update.

### Sharing our performance

*Table 1- Total Transactions (August 2022)*

Item	Volume
Total Transactions	67,389
First retirements	11,227
Estimates	5,278
Annual allowance	1,178
Ill health applications	652
AP/ERRBO/AVC	54
Bereavements	6,462
Transfers	1,387
Nominations	1,962
Pensions On Divorce	862
Protection of Pay	62
Refunds	1,749
Revised retirements	369
Service	977
Inbound processing	3,599
Data support	17,871
Pensioner admin	13,700

*Table 2 - First Retirements and Pensioners (August 2022)*

Item	Volume
Applications Processed	11,227
On Time	95.8%
Amount paid in Lump Sums	£308,575,801.24
Amount of Pension Paid	£896,304,113.47
No. Pensioners in Payment	1,074,751

*Table 3 - Employer Helpline statistics (August 2022)*

Item	Volume
Total Volume Calls	2,821
Average Handling Time (s)	552
Average Speed of Answer (s)	139

*Table 4 - Member Helpline statistics (August 2022)*

<b>Item</b>	<b>Volume</b>
Total Volume Calls	16,757
Average Handling Time (s)	635
Average Speed of Answer (s)	1,314

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.

## **Extension of 2020/21 voluntary scheme pays deadline for members with an annual allowance charge**

To help support NHS Pension Scheme members who are continuing to deal with the impact of the Coronavirus (COVID-19) pandemic, the decision has been taken to extend the voluntary scheme pays deadline for 2020/21.

If a member has an annual allowance charge for 2020/21 and they wish to use voluntary scheme pays to pay all or part of this charge, they now have until 31 March 2023 to submit their application.

More information can be found on the [Employer Hub](#).

## **2021/22 Pension savings statements**

We are currently sending pension savings statements to members whose pension benefits have increased by more than the standard annual allowance.

The annual allowance is the maximum amount of tax-free growth an individual's pension can grow by in one year.

If a member has exceeded the annual allowance and has pension benefits in both the 1995/2008 Scheme and 2015 Scheme, they may receive two statements, one for each Scheme.

Statements are being sent out in batches so will arrive separately and most likely at different times.

We expect all statements should arrive by 6 October 2022.

We're unable to advise when a member's individual statement/s will be dispatched. If a member is expecting to receive a statement and hasn't received it by the 6 October 2022, please ask them to contact us.

You can find more information on the annual allowance and pension savings statements on our [annual allowance webpage](#).

## **TRS Refresh**

Total Reward Statements (TRS) are now available. We have updated our TRS website information and employer resources.

## **Pensions Online (POL) downtime**

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

- 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.

## **Pensions Online (POL) contribution rates and closing employments**

From 1 October 2022 changes are being made to the contribution tiers and rates for members. As a consequence of these changes being implemented mid-year, it is necessary for Pensions Online (POL) to display both sets of contribution rates. The rates to be used up to and including 30 September 2022 and those to be used from 1 October 2022.

This means if you are closing an employment, you will be asked to select the correct contribution rate for the member from a list containing both sets of current contribution rates.

You can find the current contribution rates and those to be used from 1 October 2022 on our [contributions webpage](#).

If you have recently tried to close a member record and have been unable to do so, this should now be resolved, and you should be able to select the appropriate contribution rate

to allow you to close the employment. If you are still experiencing issues, please get in touch with our stakeholder engagement team via [nhsbsa.stakeholderengagement@nhs.net](mailto:nhsbsa.stakeholderengagement@nhs.net)

## **Introduction of member contributions changes**

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 [NHS Pension Scheme: proposed uplifts to the member contribution tier thresholds](#).

Following the publication of the final contributions table to be implemented on 1 October 2022, we updated our Payroll Provider Requirements document which you should have received last week.

If you've not already, please share the requirements document with your payroll provider as soon as possible to make sure they're aware of the changes to the contribution tiers. These will need to be applied to all members from 1 October 2022.

If your payroll provider is ESR or NHS Dental Services, they have already been informed, so you do not need to contact them.

You can find a copy of the updated Payroll Providers Requirements, along with more information for you as an employer, a copy of the letter we are sending to members and resources you may wish to use on the [employer webpage](#) of our [Changes to public service pension schemes web hub](#),

Information for members, including a video explaining the changes, is also available on our [contributions webpage](#).

### **Employer events**

Earlier today we held an event for ESR employers. Information from the event will be circulated as soon as possible.

If you are a direction body, you should have already received details of an upcoming event for you on the changes. If you are a GP practice, we will be circulating details of an event specifically for practices soon.

### **ESR fatal errors**

Prior to NHS Pensions processing data received from ESR, checks are made to determine that the data is in the required format and meets the criteria provided to enable successful processing and updating of member records.

If data is not in the acceptable format, it will be rejected and will be reported to employers as a 'fatal error'.

NHS Pensions have noticed that there has been an increase in some fatal errors and remind employers to check and resolve these as failure to do so will result in data not being updated to the member record.

Fatal errors are not reported through Pensions Online error handling and employers should check their rejected NHS Hub Pensions Interface Reports, accessed through [the ESR hub](#) for their individual reports.

You will also receive an automated email from ESR advising when you have any fatal errors.

A guide on how to correct fatal errors can be found on our [website](#).

## Estimate request changes

The charging of estimate requests has changed for members. The members estimate request form has been updated and is available on the [Member Hub](#).

### Estimate requests - Instruction for employers:

- Direct members to their Total Reward Statement (TRS) statement in the first instance.
- Use Pensions Online (POL) to produce an estimate where possible.
- Where there is no TRS statement (for whatever reason) or an estimate cannot be produced on POL, members can request an estimate free of charge. This includes ill health estimates regardless of whether a 'Consideration of entitlement to ill health retirement benefits' form (AW33E) has been submitted.
- Hypothetical estimates may incur a charge.
- Charges still apply for individual protection valuations and some cash equivalent transfer value (CETV) quotations for divorce purposes.

## NHS Pensions member events

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

## GP practice manager training dates – September, October and November

### Level 1 GP practice manager event

Our next Level 1 GP practice manager event is available in 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 date and time for the next session are as follows:

- Thursday 27 October 2022 from 10am to 3.30pm. [Click here to register](#)

By attending this event 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](mailto:nhsbsa.stakeholderengagement@nhs.net)

## Level 2 GP practice manager event

Our next Level 2 GP practice manager event is available in September and November 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 date and time for the next session are as follows:

- Thursday 29 September from 10am until 3pm. [Click here to register](#)
- Wednesday 9 November from 10am until 3.30pm. [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: [nhsbsa.stakeholderengagement@nhs.net](mailto:nhsbsa.stakeholderengagement@nhs.net)

## NHS Workforce programme update

The NHS Business Services Authority (NHSBSA) is leading an NHS-led transformation programme to identify and deliver the future NHS workforce solution.

The solution will build on the success of the current Electronic Staff Record (ESR) system in support of the NHS People Plan and the wider NHS workforce policies. The programme aims to:

- support effective recruitment, retention and workforce planning within health and care
- provide workforce services that support the delivery of the NHS People Plan and other workforce policies
- maintain ongoing engagement and outcomes from the future of NHS HR and the Organisational Design (OD) programme

More information on the programme and the current progress can be found on the [NHSBSA website](#).

You can also keep up to date with the programme by signing up to the [FutureNHS workspace](#) and [sign up to the contact form](#) to receive information direct to your inbox.

If you have any questions, you can contact the programme team at [nhsbsa.esrdiscovery@nhs.net](mailto:nhsbsa.esrdiscovery@nhs.net)