

NHS Pensions Update – August 2024

In this month's newsletter:

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- NHS Pensions member events (to be shared with all members)

If you don't normally receive this email directly from NHS Pensions or you'd like any other members of your staff to receive a copy, please email stakeholderengagement@nhsbsa.nhs.uk to be added to our distribution list.

The Employer Charter has been temporarily removed whilst it undergoes an update and a revision. We'll republish the updated version as soon as possible. Thanks for your understanding.

Sharing our performance

Table 1 – Total Transactions (July 2024)

Item	Volume
Total Transactions	111,717
Apply Annual Increases	2,371
Buy Additional Pension	798
Buy AVCs	129

Buy ERRBO	198
Calculate and Pay Retirement Benefits	12,931
Claim Protection of Pay	19
Complaints	133
Death Benefits Calculated and Paid	7,526
Defer Benefits	1,071
Determine Continuing Entitlement	99
Elect of Scheme Pays	284
Make Enquiry	43,868
Manage Complaint	1,508
Manage Data	16,776
Manage Ongoing Payments	1,518
Manage Overpayment	15
Nominate or Change Beneficiary	4,375
Pension Share/Pensions on Divorce	1,555
Recalculate Retirement Benefits	3,318
Receive Estimate of Benefits	6,704
Receive Savings Statement	281
Refund of Contributions	2,406
Transfers	3,834

Table 2 – First Retirements and Pensioners (July 2024)

Item	Volume
On Time	91%
Amount paid in Lump Sums	£362,106,427.00
Amount of Pension Paid	£85,081,635.00
No. Pensioners in Payment	1,154,568

Table 3 – Employer Helpline statistics (July 2024)

Item	Volume
Total Volume Calls	3,221
Average Handling Time (s)	573
Average Speed of Answer (s)	112
Total Volume Emails	3,078
Service Level (48 hours)	96.7%
Processing Rate (per hour)	7

Table 4 – Member Helpline statistics (July 2024)

Item	Volume
Total Volume Calls	38,191
Average Handling Time (s)	638
Average Speed of Answer (s)	84

Total Volume Emails	36,226
Service Level (48 hours)	96.7%
Processing Rate (per hour)	8.9

Pensions Online (POL) downtime – September 2024

POL will not be available on the following dates due to scheduled system maintenance:

- Sunday 22 September

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

Total Reward Statement refresh August 2024 – information for employers

The annual refresh of Total Rewards Statements (TRS) and Annual Benefit Statements (ABS) has taken place and updated statements are available to NHS Pension Scheme members.

Members affected by McCloud will see a difference in the benefits shown on their ABS. This is due to the rollback of membership from 1 April 2015 to 31 March 2022 being put back into the 1995/2008 Scheme. A video for affected members to learn about the change in their ABS is available on the NHS Pensions YouTube channel here: [TRS live event | 21 August \(youtube.com\)](#)

There is a toolkit of resources to help you promote the updated statements to your employees including a 'to-do' list, a video, posters, a factsheet, images, branding guidelines and document templates. The toolkit can be found on our website here: [Promoting the statements](#).

Some members of the NHS Pension Scheme have not been issued with an automatically updated TRS in August. There are multiple reasons a member may not have received this update, such as a change in pay or having a certain number of disallowed days (including unpaid leave or strike days).

For members who did not receive an updated TRS in August, we are working to provide an updated TRS in December. If a member requires an up-to-date TRS prior to December, they can request one at: [Getting an estimate of your pension | NHSBSA](#).

If a member requires more information, they can visit our website: [Why you might not be able to see a statement | NHSBSA](#)

Accessing ABS for non-ESR organisations

If your employees do not have access to Electronic Staff Record (ESR), they may have previously used Gov.UK Verify to access their ABS. If your employees are actively contributing to the NHS Pension Scheme, then we have written to them, including practitioner members, and provided their registration information for our new digital platform 'My NHS Pension'. They will be able to access their statement on My NHS Pension. More information can be found on our website here: [My NHS Pension | NHSBSA](#)

Pay for partial retirements following April 2024 pay increase

Following the nationally agreed pay award, which has been backdated to April 2024, the pay for any retirements from that date will need revising to ensure the pension is being paid at the correct level.

For partial retirements, where pay cannot be updated through Pensions Online (POL), the figures will need to be submitted to us manually.

Due to the number of members this affects, and to mitigate the workload for you, we have been looking at the most efficient method of doing this.

We are in the process of finalising a pre-populated spreadsheet with the members of your organisation that have retired on or after 1 April 2024. You will be asked to complete this spreadsheet with the revised pay details and submit it to us via email. We will then update the member records using the information you provide and process the revised benefits. This will happen towards the end of this year, following ESR updates.

More information about this will be confirmed in a future Employer Update.

New employee questionnaire forms

We have seen an increase in members submitting the New Employee Questionnaire form directly to NHS Pensions. Could all employers please make sure that members are aware that they must submit this back to yourselves (their employer), and not to NHS Pensions.

Stakeholder engagement events

The Stakeholder Engagement Team run a series of free events throughout the year providing regular updates and delivering educational training. Some events include Continuing Professional Development (CPD) accreditation and details of upcoming events are available on the [Employer Hub on our website](#).

We do not endorse any third-party training events.

If your organisation would like to request training or attendance directly from the Stakeholder Engagement Team, please email the team:
stakeholderengagement@nhsbsa.nhs.uk

Administration Foundation Course dates for 2024

This free 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 Scheme 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 details for the next available course are available on the [Employer Hub on our website](#).

GP Practice Manager training

Further dates are available for the Level 1 and Level 2 GP practice manager (free) events, which include educational training tailored for practice managers, delivered via Microsoft Teams. Practice managers need to attend the whole training session to receive a Continuing Professional Development (CPD) accreditation.

Foundation course

The next available course will be on 4 October 2024. [Visit our Eventbrite page](#) for more information and to reserve your space.

Level 1 GP Practice Manager events

This session includes information on the NHS Pension Scheme website, Annual Benefit Statements, roles and responsibilities, Pensions Online (POL), the AW8 and the member journey.

The next available course will be on 17 October 2024 at 10am. [Visit our Eventbrite page](#) for more information and to reserve your space.

Level 2 GP Practice Manager events

These sessions include roles and responsibilities, flexible retirement, leave overview, ill health, and family benefits.

The next available course will be on 3 September 2024 at 10am. [Visit our Eventbrite page](#) for more information and to reserve your space.

Member events dates for October 2024

These regularly held events aim to help members understand everything they need to know about their NHS pension. Whether you're a new member wanting to learn how to navigate the Scheme, or a long-time member wanting to refresh your knowledge, these events are engaging, informative and a must for any NHS Pension Scheme member.

On average, over 99% of attendees would consider recommending our member events to a colleague, with an average quality rating of 4.4/5.

All our member events have options for both members in the 2015 NHS Pension Scheme and members in both the 1995/2008 and 2015 schemes.

Please click on the following Member events for more information, including dates, times and an event overview:

- [Your retirement options explained \(all Schemes\)](#)
- [Understanding the Scheme and its benefits \(all Schemes\)](#)
- [Introduction to the 2015 Scheme and the NHS Pension Scheme benefits \(2015 Scheme\)](#)
- [Your Annual Benefit Statement explained \(all Schemes\)](#)