

Gateway number: 04/NHSBSA/02/17

Please note: We are waiting for the publication of the final outcome of the administration levy consultation. We will contact you again when we have more information.

NHS Pensions Employer Newsletter 3 - March 2017

1. The new look website is on the way

Work continues behind the scenes to create our new look website. Taking on board your feedback from the annual Customer Satisfaction Survey we have designed the new site so it is easy to navigate and fully searchable. The website has many more new user friendly features:

- We have a navigation menu on the right hand side of every page so you will always know where you are and where you have been on the website.
- All information, guides and forms about a particular pension event are in the same place so members no longer have to go hunting for the things they need to complete their action. So for example, the AW8P is on the same page as the information about retirement and how to claim a pension.
- We are displaying information in a different way so that you no longer have to scroll through long pages of text to find what you are looking for. Simply find the information you wish to read, click on the + button (which is the symbol for an accordion link) and the content you need will drop down onto the page. When you are done just click on the – button and the content will fold back up and you can move on to the next piece of information.
- Our videos are embedded into the website which means you can watch them immediately without leaving our site (Please note you will need access to YouTube to do this).
- The new website is responsive to different devices so you will be able to easily access it on a smart phone or tablet.

At the time of publication we are scheduled to go live on **Monday 17 April**. We will confirm this date in the next newsletter. We will be really keen to hear what you think of the design and layout of the new website so there will be a feedback mechanism on the bottom left of every page of the site for you to send us your comments. We will review these comments regularly and use them to make improvements.

2. Changes to bereavement documents

Legislation effective from 6 April 2016 amended the tax charges for lump sum on death payments payable to HM Revenue & Customs (HMRC) where payment is made more than two years after NHS Pensions has been informed of the member's death. The following forms and guides have been revised to take account of the new legislation:

Claim for a lump sum on death of an active member (AW11)
Claim for adult dependant pension on death of an active member (AW9)
Form to claim death benefits for a deferred member (AW9P)
Claim for a lump sum on death in respect of a Pension Credit (AW11PC)
1995/2008 Member Guide
2015 Member Guide
Survivors Guide

Please note the AW158 and AW9 have been combined with the G60 payment form therefore it is no longer necessary for you to issue a separate G60. The revised forms and guides are available to view on our website.

3. Protection of Pay - reminder

We have recently received a number of Protection of Pay applications outside the three month deadline date. Members must be advised of the possible impact on their pension and their options regarding the [Protection of Pay](#) application process. This is to remind you that the three month deadline must be followed and you should provide advance notice to members to avoid delay or disappointment.

Although Protection of Pay is not relevant to a 2015 Scheme member, you will need to consider whether a member has a final salary link to 1995/2008 Scheme membership if pay is being reduced. Amended factsheets will be available on the website shortly.

4. Products that are chargeable

NHS Pensions provides a wide range of pension benefit information for its scheme members. Where there is a legislative requirement to provide information it is normally provided free of charge.

Changes to the current process

The 'schedule of charges' has been replaced by number of new application forms. These have been created to ensure the customer can identify whether their request is chargeable, confirm what information they require and to inform them of the available payment methods.

Application forms have been created for the following types of chargeable requests:

- [Officer Estimates](#) (also includes information around non chargeable estimates)
- [Practitioner Estimates](#)
- [Officer/Practitioner IP valuations](#) – 2014/2016 (these all now include the AW295 form within the application form)
- [Cash Equivalent Transfer Value \(CETV\)](#)

Payment can be made by cheque and this should be enclosed with the application form and posted to NHS Pensions.

Alternatively, an electronic payment can be made directly to NHS Pensions. In these instances the completed application form can be emailed to NHS Pensions via the nhsbsa.pensionsgeneral@nhs.net account or posted to NHS Pensions. Please note we will not be able to process any requests without a completed application form.

5. Pensions Digitisation

Once again it has been a busy time for the Pensions Digitisation Programme. We have now moved into the [Private Beta](#) for the 'Submit your NHS Pensions contributions' service which means we are now starting to build a 'live' service that we can test with a small group of users, taking on board feedback and fixing problems before we roll it out to all employers.

Our User Researchers recently visited Fairway Training, who submit contributions for nearly 600 different EAs, to understand their needs from the service. The insight they have provided was very useful in terms of thinking about possibly providing a bulk upload solution.

Work has also continued on delivering a solution for accessing Total Reward Statements once Government Gateway is decommissioned in 2018. Our User Researchers recently held a pop up event at Chesterfield Royal Hospital to try and understand:

- Which documents users could / could not provide to verify who they are (passport, driving license, membership (SD) number).
- Users were able to understand what the service is and what they are accessing by using the service.
- How users find the service, and what search terms they would use.
- The language and terminology users use when talking about the service and the statement.
- How users navigate to the service from the Total Reward Statement portal.

- If users could not access their statement digitally how they would expect to gain access to their statement.

This project has also moved into Private Beta so we are working on building a live system to test.

Once again, thank you to everyone who has been involved in testing the prototypes to date. We will continue to need your help testing the live systems so if you think you can help please email nhsbsa.insight@nhs.net and we will get back to you.

We will continue to keep you up to date about our progress and how we would like you to be involved through this newsletter and the national and regional pensions groups. If you have any questions about the project please email nhsbsa.pensionsdigitisation@nhs.net

6. Most viewed Ask Us articles

Each month we provide you with the 10 most viewed articles in Ask Us. The results for January are below:

Most viewed article	Hits
How can I calculate the notional whole time salary for a part time staff member?	213
When would it be necessary for me to post an AW8 application form to NHS Pensions?	179
Where can I find guidance on completing the SD55 terminating a period of employment?	164
What should I do if I have paid the incorrect amount of contributions to NHS Pensions?	136
Where can I find guidance on completing the SD55 annual update?	120
How does an employer pay their pension contributions to NHS Pensions?	104
What is my EA code?	97
What are the capacity codes?	85
Do I need to submit the SD55 and SD55T when a member is retiring?	85
How can I apply for Mental Health Officer (MHO) status?	84

7. Pensions Online downtime

Pensions Online (POL) will be unavailable between the following times:

- 7pm on Friday 3 March and 7am on Monday 6 March

Please note: at times we may need to take POL offline at short notice. Updates will be provided on our website when possible.

We apologise for any inconvenience this may cause.

The April issue of the Employer Newsletter will be published at the end of March.