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NHS Pensions Employer Newsletter 6 - June 2017

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1. Our postal address has changed

To ensure we are fully utilising the resources and expertise available in the NHSBSA and to ensure we manage our processes in the most cost effective way, we are changing the way that our incoming post is handled. Any post we receive relating to a member must be scanned so that it can be uploaded to their record and actioned appropriately. From 24 July this scanning activity will be undertaken by colleagues in our Bolton offices who have the equipment and capabilities to carry out this work.

Therefore to prepare for these new arrangements our postal address has changed. From now on if you or a member need to send anything to NHS Pensions by post please use this address:

NHS Pensions
PO Box 2269
Bolton
BL6 9JS

NHS Pension Scheme members can also continue to contact us via the member helpline on 0300 3301 346 or they can direct message us on Twitter by following us @nhs_pensions

NHS employers can continue to contact us via the employer helpline on 0300 3301 353 or by emailing nhsbsa.pensionsemployers@nhs.net

Please be assured that until 24 July post addressed to the new Bolton address will be redirected to our current address at Hesketh House. We are starting to communicate these changes now to ensure that we have plenty of time to inform members and employers before the new scanning arrangements come into place.

We have updated the forms, factsheets and guides on the website and are currently updating the letters we send out so please don't worry if you still see our old address appear on anything for a short while.

Can we also please ask that you:

- update any current address information you have in place such as on your website or intranet
- ensure staff are made aware of the change to our postal address in your local communications

All post for the Injury Benefits Scheme should still be sent to Hesketh House until further notice.

2. Data required for Annual Allowance

Legislative requirements place a responsibility upon employers to provide information to NHS Pensions. This information will enable NHS Pensions to provide an Annual Allowance statement to members who could be affected.

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

The information will enable us to generate a Pensions Savings Statement (PSS). This statement will inform members of whether they have exceeded the Annual Allowance limit in the NHS Pension Scheme.

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 2016/17 by 6 July 2017 (information for previous years should already have been received). If the member's record is not updated by the employer by this date, then 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 meaning we will not then be able to generate a PSS and notify potentially affected members in a timely manner. Members could, as a result, be subject to fines and late payment penalties from HMRC.

You may have already, or will in the near future, receive bulk or individual requests from the Annual Allowance Data Cleanse Team. Please ensure any requests with the email subject header 'Annual Allowance' are actioned as soon as possible. Data cleanse activity is ongoing so you could still receive requests for information or data between now and 6 October 2017.

Special arrangements were made for Regional, Local Teams of Primary Care Support 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.

3. The NHS Pensions website

Have you visited our new look website yet?

It is really important that you submit feedback telling us what you think about your experience of using the new site. This could be observations about the design and layout, anything you expect to see that's not there or anything that's not working for you. We also want to hear about the things you like so we can keep doing them!

You can find the link to provide feedback at the bottom left of every page of the site in the 'help us improve our website' pod or use this [direct link](#).

By analysing the feedback you have submitted so far we have been able to identify areas we could change quickly to make the website easier for you to use:

- We have created an [employer forms](#) section so you can quickly locate the forms you need. Forms are also still available in the relevant subject area within the Technical Guidance pages.
- On occasion you can request a specific archived newsletter, please check the [Employer Newsletter article titles \(2006 to present\)](#) list on our website and email nhsbsa.stakeholderengagement@nhs.net stating the newsletter you require and the reason for this.

A longer term plan is currently being developed to look at improving the information structure and language used on the site.

We will keep you informed about any further changes in this newsletter.

4. Estimated Scheme Pays elections

NHS Pensions has been receiving estimated Scheme Pays elections for the 2015/16 Pension Input Period for transition members of the 1995/2008 and 2015 Schemes where the member has only provided one estimated figure on the Scheme Pays Election (SPE2) form. Please remember the 1995/2008 and 2015 Schemes are separate Schemes for HMRC purposes.

This would mean if the member later required Scheme Pays from both Schemes and the election was received after HMRC's time limit (31 July 2017 for the 2015/16 year, unless the member retired or reached age 75) then the revision for the Scheme Pays for the Scheme where there was no previous election would be rejected.

Example:

A member makes an estimated Scheme Pays Election for the 1995/2008 Scheme but not for the 2015 Scheme. In January 2018 the member sends a finalised Scheme Pays Election for 1995/2008 Scheme and a 'new' election for the 2015 Scheme.

Provided the 1995/2008 Scheme Pays Election meets the usual financial criteria the revision would be accepted, however the request for the 2015 Scheme will be rejected because an election for Scheme Pays for the 2015 Scheme was not received within HMRC's time limit.

Pension Officers are requested to bring this information to the attention of members who may be affected (normally high earning members based on the whole time equivalent pay) as soon as possible.

5. Targeted customer surveys

As discussed at the National Pension Group meeting in April, we have made the decision to increase the frequency of surveying both members and employers from annually to quarterly. The surveys will focus on specific pension events during a member's journey with NHS Pensions. We will also look to survey employers on a more frequent basis, which will allow us to drive innovation, inform and test future developments, and identify areas for continuous improvement within the business.

The surveys will initially be sent to:

- members who have received an estimate (excluding Annual Benefit Statements / Total Reward Statements) during April and the beginning of May

- employers who have contacted either nhsbsa.pensionemployers@nhs.net or nhsbsa.stakeholderengagement@nhs.net during April and the beginning of May.

Our target audience will then change on a quarterly basis looking at different areas of NHS Pensions and we would be extremely grateful for both employers' and members' cooperation.

6. Prudential Money Purchase Additional Voluntary Contributions (MPAVCs)

Prudential have recently introduced a new [online joining facility](#) for members to join their MPAVC scheme. This service is available 24/7 and is already up and running. This has been introduced in addition to their telephone service where members can contact one of their Retirement Specialists on **0800 028 1502**.

More information about the MPAVCs and other ways to increase pension benefits is available on the '[Increasing your pension](#)' page of our website.

7. Submitting a joiner form (SS10) (Non ESR employers)

Non ESR employers are not required to submit a 'Joining or rejoining the NHS Pension Scheme (SS10)' form for NHS staff that opt out of the Scheme within the first calendar month, providing they have completed the application to leave the NHS Pension Scheme (SD502) opt out form and you have submitted it to NHS Pensions.

Deleting an SS10 joiner form for new starters who then opt out within the first calendar month may create an error on the member's record.

Where a member has not opted out in the first calendar month the SS10 joiner form should be submitted to NHS Pensions.

Please note: a calendar month is the period from a specified day in one month to the day numerically corresponding to that day in the following month. For example, from 2 April to 2 May inclusive is considered a calendar month.

8. Total Reward Statements/Annual Benefit Statements data cut

We will take the Total Reward Statement/Annual Benefit Statement data cut for the annual refresh of statements following close of business 23 June 2017 (7pm). Only data received and successfully processed onto a member's pension record at that point will be used in the pension calculations.

It is anticipated that updated statements will be available mid to late August 2017, the exact dates will be published nearer the time.

9. Most viewed Ask Us articles

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

Most viewed article	Hits
How can I calculate the notional whole time salary for a part time staff member?	222
Where can I find guidance on completing the SD55 Annual Update?	189
What should I do if I have paid the incorrect amount of contributions to NHS Pensions?	146
When would it be necessary for me to post an AW8 application form to NHS Pensions?	119
Where can I find guidance on completing the SD55 Terminating a Period of Employment?	115
Do I need to submit the SD55 and SD55T when a member is retiring?	85
What is the Equality monitoring questionnaire and when should it be used? <i>(Note: this article has been removed as it's no longer relevant)</i>	79
How does an employer pay their pension contributions to NHS Pensions?	70
What is an AW171 and how should it be submitted?	66
What is the NHS Pensions Scheme Registry Number?	64

10. Pensions Online downtime

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

- 7pm on Friday 23 June and 7am on Monday 26 June
- 7pm on Friday 30 June and 7am on Monday 3 July
- 7pm on Friday 7 July and 7am on Monday 10 July

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 July issue of the Employer Newsletter will be published at the end of June.