

Gateway number: 02/NHSBSA/06/17

## **NHS Pensions Employer Newsletter 7 - July 2017**

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### **1. Website feedback**

It's important you keep providing feedback about our new website. We want to hear about our design and layout, anything you think is missing or improvements you'd like to see. Also tell us what you like so we can keep doing it!

You can find the link to provide feedback at the bottom left of every page of the site labelled 'help us improve our website'.

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.

## **2. Address change reminder**

Don't forget that we now have new postal addresses.

If you or a member needs to send anything to us by post please send it to:

NHS Pensions  
PO Box 2269  
Bolton  
BL6 9JS

All post for the Injury Benefits Scheme should now be sent to:

NHS Injury Benefits Scheme  
PO Box 2271  
Bolton  
BL6 9JU

## **3. Certificates/self addressed envelope**

If a member needs to send in certificates or supporting documents to us, remind them that they need to send the originals or certified copies. If they send photocopies we won't be able to proceed with their request. We are also asking members to enclose a self addressed envelope with their valuables so we can return their documents as soon as possible. We will pay for the postage.

## **4. Medical services transition**

Our current contract with OH Assist to deliver Medical Services on behalf of the NHS Pension and NHS Injury Benefits Schemes expires on 23 July 2017. A new contract has been awarded to Medigold Health Consultancy Ltd who will deliver the service for us from 24 July 2017. The transition will not cause any delay to existing ill health or injury benefits applications.

## **5. Finance arrangements**

From 24 July 2017 the NHSBSA will become responsible for finance services currently provided by Equiniti Paymaster. The transition will have little impact on finance business as

usual procedures. Please continue to submit your monthly contributions via the route you currently use. Pensions Online (POL) will be unaffected and current contact details will remain the same should you need to get in touch with a finance query.

Taking on this work will enable us to provide a true end to end service for the NHS Pension and Injury Benefits Schemes, and allow us to review and improve our processes. Over the next six months we will embark on a programme of work to look at this and also look at improving the way Pensions Finance communicate with you, the information on our website and how you contact Pensions Finance.

We will keep you updated about our progress in this newsletter.

## **6. 2017 Year end updates**

The deadline for supplying your year end information (for Officer and Practice staff members) has now passed. If you did not supply the information by 31 May, either via Pensions Online or by completing the spreadsheet that was emailed to you, your organisation is not compliant with the Scheme regulations.

This means that your members will not be able to access a current 2017 Annual Benefit Statement in August, as the data cut for the calculations has now taken place. Your members may incur a charge should they request an up to date statement.

Failure to provide the individual member data will result in your non compliance being reported to The Pensions Regulator. Please update your records now to avoid this.

Please note: Practitioners and non-GP provider employers have 13 months to submit their returns.

## **7. Total Reward Statements/Annual Benefit Statements data cut**

The data cut for Total Reward Statements/Annual Benefit Statements was successfully taken following close of business on Friday 23 June 2017 and the activities for the 2017 refresh have now commenced, starting with around 3 million pension calculations being performed for each Section/Scheme for both our active and deferred members. We will update you next month on progress during the refresh period.

## **8. Heat maps (ESR employers)**

This year's heat maps have now been issued. They give you the results of how successful your ESR year end data was up to 31 March 2017.

The heat maps now reflect data errors that are not always avoidable (overlaps, exceeding whole time, etc.) more accurately so that you get a clearer picture of your success rate. As mentioned, the overall success rate was increased by individual employer to take into account unavoidable errors, which is why the heat map reflects a higher amount than those shown in information table.

We increased the percentage this year from 90% to 95%, because so many employers are achieving such a higher rate of success than when we introduced these several years ago and we wanted to show this improvement, but also to enable employers whose success rate may be less than this to strive to continually improve.

The amount of information that we have received does not take into account any information that the system will not accept as fit for purpose and as such cannot be processed. This data is returned to the employer via the ESR reporting functionality as a fatal error for onward employer action to resolve and resubmit if appropriate via Pensions Online.

If you are an ESR employer and have not received your heat map, please email [nhsbsa.stakeholderengagement@nhs.net](mailto:nhsbsa.stakeholderengagement@nhs.net) who will investigate why one hasn't been issued. Please be aware we can only issue them to the person who we hold on our records as the named Pensions Officer and the named Financial Director.

## 9. New call handler procedure

The procedures at our Contact Centre have recently changed and our call handlers are now required to log specific information about calls received. This is for audit purposes and to ensure that the correct caller information is being recorded and referred to the administration teams. The details they are required to record are:

- caller's name
- relationship to the member
- contact number.

Please be aware you might be asked these questions when calling the employer helpline and should be prepared to answer them.

## 10. Letter of authority policy amendment

In order to allow a third party access to a member's pension information, we require a letter of authority from the member. We ask that letters of authority only hold details for **one** individual at a time. Each member should have a separate letter of authority, signed and dated by them. Ideally this should not hold multiple members' details.

The letter of authority should include:

- member's name
- membership (SD) number/National Insurance number
- date of birth
- full address
- details of the individual/organisation being given authority.

A member may have more than one letter of authority in effect at a time. Each will be valid for three years from the date received (unless authority is withdrawn earlier by the member).

## 11. Annual Allowance information deadline date

Employers are required in legislation to provide information to NHS Pensions which enables Pension Savings Statements to be provided to members. This statement informs members whether they have exceeded the Annual Allowance limit in the NHS Pension Scheme.

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

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, 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. We will not be able to generate a Pension Savings Statement and notify potentially affected members in a timely manner. Members could be subject to fines and late payment penalties from HMRC.

Special arrangements were made for PCSE/NHS 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.

## 12. Estimates for members who have membership in the 1995/2008 Scheme with Protection of Pay

Following feedback from both our members and employers, we have made the decision that a member will qualify for a protection of pay estimate free of charge if they:

- are over minimum pension age
- intend to retire within the next 12 months.

The £75 charge will still apply if a member applies for a protection of pay estimate and they are below minimum pension age and/or have no intention to retire within the next 12 months.

We are in the process of updating the estimate request forms to reflect these changes.

### 13. Most viewed Ask Us articles

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

Most viewed article	Hits
<a href="#">How can I calculate the notional whole time salary for a part time staff member?</a>	250
<a href="#">Where can I find guidance on completing the SD55 Annual Update?</a>	209
<a href="#">What should I do if I have paid the incorrect amount of contributions to NHS Pensions?</a>	150
<a href="#">When would it be necessary for me to post an AW8 application form to NHS Pensions?</a>	134
<a href="#">Do I need to submit the SD55 and SD55T when a member is retiring?</a>	105
<a href="#">What is an AW171 and how should it be submitted?</a>	78
<a href="#">What are the joiner and leaver forms?</a>	72
<a href="#">How does an employer pay their pension contributions to NHS Pensions?</a>	63
<a href="#">How should I submit an AW8 application form if I do not have access to Pensions Online (POL)?</a>	61
<a href="#">What is the NHS Pensions Scheme Registry Number?</a>	60

### 14. Pensions Online downtime

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

- 7pm on Friday 30 June and 7am on Monday 3 July
- 7pm on Friday 7 July and 7am Monday 10 July
- 7pm on Friday 28 July and 7am Monday 31 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 August issue of the Employer Newsletter will be published at the end of July.**