

NHS Pensions Employer Newsletter 9 - September 2017

We would like you to spend a few minutes providing feedback for this newsletter, please complete this [short survey](#).

- 1. Total Reward and Annual Benefit Statements 2017 refresh**
- 2. Total Reward and Annual Benefit Statements mid year refresh plans – October 2017**
- 3. Ove five year rejoiners**
- 4. Clarity around protection of pay estimates**
- 5. Submitting the revised retirement benefit details (AW171) form**
- 6. Pensions Online release – Award applications**
- 7. Pensions Online – submitting employer comments**
- 8. NHS Pensions Service Improvement and Development Board meeting July 2017**
- 9. Most viewed Ask Us articles**
- 10. Pensions Online downtime**

1. Total Reward and Annual Benefit Statements 2017 refresh

We are currently in the process of sending emails to employers to let them know that refreshed Total Reward Statements (TRS) or Annual Benefit Statements (ABS) for their organisation are available.

The emails show which EA the email relates to, so if you look after more than one EA code you will receive an email for each one. These **may** be sent on different days.

All emails will have been sent by 7 September.

To help explain what the statements contain, we have [a set of videos](#) available on YouTube. Links to the videos relevant to your employees are included in the emails being sent out. We understand staff may not be able to access YouTube from work, however the videos can be accessed from home by searching for the NHS Business Services Authority channel (TheNHSBSA) on YouTube.

Don't forget we also have posters, example newsletter articles and other materials available on the [TRS information website](#) to help you inform your staff about the statements.

Please note: the emails are being sent to the contacts we hold on our system as the 'main pensions contact' and 'TRS contact'. If you receive the Employer Newsletter because you are on our additional distribution list, you will not receive a TRS/ABS availability email. If anyone receives the email but is no longer the main contact they should email nhsbsa.contactdetails@nhs.net so that we can update our records.

2. Total Reward and Annual Benefit Statements mid year refresh plans – October 2017

For the second year we are planning to carry out a mid year refresh of statements and the data cut will be taken over the weekend of 14/15 October 2017. This means any data amendments will have to be made **by 7pm on Friday 13 October 2017**. The refreshed statements will be available early December 2017.

Please remember, whether a pension calculation can be performed is dependent on the quality of the data at the point of each data cut.

3. Over five year rejoiners

Members who qualify for a five year rejoiner estimate will be individually notified and directed to a personalised comparison pack request form on the NHS Pensions website.

This is because members who return to pensionable NHS employment after a break of more than five years who are allocated to a different Section or Scheme from their earlier period of deferred membership (1995 or 2008 Section), may be eligible to transfer deferred benefits from their earlier period of membership into their current Section or Scheme (2008 Section or 2015 Scheme) on a Cash Equivalent Transfer Value (CETV) basis.

A CETV is the capitalised (or total) value of their deferred benefits and is calculated in accordance with the NHS Pension Scheme regulations by reference to guidance provided by the scheme actuary.

Members who request a personalised comparison pack will then have a one off opportunity to transfer their deferred benefits.

4. Clarity around protection of pay estimates

Following the Employer Newsletter article about [protection of pay estimates published in June](#), we have provided the below guidelines:

Upon request we will provide a 'most beneficial' Age estimate, including protection of pay/multiple breaks, for any members that are within 12 months of normal pension age, free

of charge. Members over normal pension age are also eligible for one free 'most beneficial' estimate which includes protection of pay/multiple breaks.

The £75 charge will apply if a member requests an estimate to take account of their protected pay and they are more than 12 months away from reaching their normal pension age.

If a member does require an estimate of benefits including their protection of pay you can request this by submitting the [request for an estimate of benefit form \(AW295\)](#).

5. Submitting the revised retirement benefit details (AW171) form

Please remember that when sending a revised retirement benefit details (AW171) form, this **should not** be emailed to us unless it is for a bereavement case. For all other cases, the form can be completed electronically then printed from our website, signed and posted to us.

6. Pensions Online release – Award applications

Amendments will be made to Pensions Online (POL) to allow employers to submit AW8 retirement applications for members of the 2015 Scheme and members who have benefit entitlement in multiple schemes. This enhancement is currently anticipated to go live over the weekend of 9/10 September 2017.

Going forward employers will select which Scheme the member wishes to claim benefits from by entering the relevant payable dates and reason for retirements. If the member has the option to take an additional lump sum, employers will be able to input the member's lump sum decision for each relevant scheme that they are claiming from.

Validations on POL will be limited meaning extra care must be taken to ensure the member is eligible for the benefits that are selected.

Guidance will be provided at the time of the changes.

7. Pensions Online – submitting employer comments

The Data Management Team are receiving an unprecedented volume of employer comments and are currently unable to achieve a five day turnaround on this work.

While we appreciate your assistance in cleansing data, we receive an average of 400 comments a day. Around 80% of the comments do not provide the necessary information to resolve the error and are simply requesting the clearance of NHS Pensions allocated errors.

The Data Management Team work on priority errors where a joiner, leaver or annual update has not processed. This includes error 0056 (overlapping employments) which is our highest volume error. We have made great progress on our priority errors and the volumes have reduced significantly over the last few months. However, the high volume of employer comments is causing delays in our priority errors clearance.

To avoid unnecessary delays and duplicating effort, we will only prioritise error clearance where an employer has submitted a comment through error handling with the information required for the Data Management Team to correct the error and update the member record.

Please do not submit unnecessary comments. Where a comment does not provide the required information, the error will not be prioritised and will be cleared in line with our business priorities.

8. NHS Pensions Service Improvement and Development Board meeting July 2017



Following the introduction of the administration levy on 1 April 2017 which saw the shift of funding the administration of the NHS Pension Scheme from the Department of Health to NHS employers, we changed the role of the National Pension Group that had been in place for a number of years. This group consists of the Chairs from each of the regional

pension/payroll groups that meet on a quarterly basis across the country. The Chairs come together at NHS Pensions in Fleetwood every three months and historically we discussed items relating to the current service and particular items of interest that we knew were on the horizon.

Now that employers directly fund our service, the terms of reference of the group needed redefining and at the April 2017 meeting we explored how the group could play a different role moving forward. As part of the redefining of the terms of reference, the name of the group has changed to the NHS Pensions Service Improvement and Development Board. More importantly its role has changed so that the group have more influence in Pensions developments and improvements. This will support employers and create more efficient processes both internally and externally.

By providing a greater understanding of the development priorities within NHS Pensions the reasons we prioritise the way we do we can work with the group to provide a better service. Employers are better informed and able to greater influence the consideration and decisions on upcoming developments. From a Pensions perspective it gives us greater insight into the constraints employers face and the benefits some changes would make to them and how they administer the Scheme locally.

The day has been split into two sessions, the morning session is about horizon scanning and the afternoon session will focus on the current NHS Pensions change priority list and progress against those developments together with potential future changes to either a business or system process. A new process has been drawn up by the group on how to raise a change and how it goes through the approvals process in order for it to come before this board.

The above pictures were taken at the meeting held in Fleetwood in July and as you will see the session was well represented. The chairs feedback the details of the day at their next regional meetings and they in turn cascade the messages to their own organisations. Its early days - it will take a bit of time to embed the new process but all attendees are seeing this as a positive step forward in our engagement strategy.

9. Most viewed Ask Us articles

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

Most viewed article	Hits
How can I calculate the notional whole time salary for a part time staff member?	148
When would it be necessary for me to post an AW8 application form to NHS Pensions?	94
How does an employer pay their pension contributions to NHS Pensions?	76

What should I do if I have paid the incorrect amount of contributions to NHS Pensions?	63
Do I need to submit the SD55 and SD55T when a member is retiring?	53
What are final pay controls?	52
What is the NHS Pensions Scheme Registry Number?	49
What are the joiner and leaver forms?	47
What is an AW171 and how should it be submitted?	44
How should I submit an AW8 application form if I do not have access to Pensions Online (POL)?	42

10. Pensions Online downtime

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

- 7pm on Friday 8 September and 7am Monday 11 September 2017.

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 October issue of the Employer Newsletter will be published at the end of September.