

NHS Pensions Employer Newsletter 10 - October 2017

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

1. NHS Pensions – Sharing our performance
2. Payment of survivor benefits for unmarried partners
3. Have you seen our new videos?
4. Total Reward and Annual Benefit Statements refresh
5. New employer guides available
6. Changes to the retirement benefits claim form (AW8)
7. Important information when completing form AW8 (pension application form) online
8. Most viewed Ask Us articles
9. Pensions Online downtime

1. NHS Pensions – Sharing our performance

Since April 2017, Scheme employers have directly funded NHS Pension Scheme administration through the introduction of the employer levy.

As part of the introduction of the levy we agreed to engage differently with employers by being more transparent about the service we provide, including our current performance levels and work position each month, alongside an explanation of any successes or challenges we have.

Our primary focus is to ensure that pension benefits are paid within 30 days of retirement and we carefully manage our workload to achieve this target to meet members' service expectations. We acknowledge that due to the complexity of the membership history, in some instances, we can sometimes take longer to process some cases.

Our current performance

The table below shows our recent monthly performance for pension award processing:

Month	Number of awards due to be paid in month (our target)	Number of awards cleared within the month (our	Completion rate
-------	---	--	-----------------

		performance)	
May 2017	4175	3943	94.4%
June 2017	4047	4556	112.5%
July 2017	4379	4248	97%
August 2017	4227	3910	92.5%

As the table shows, our service performance during recent months has fluctuated for a number of reasons. These are:

- A higher than average intake of pension applications earlier in the year.
- Increased staff training to fill vacancies and to upskill existing staff to deal with the demand and increasing complexity of members retiring from multiple sections/schemes.
- Supporting the delivery of our two current key business transformation projects as detailed below.

Our business transformation projects

Insourcing of pensioner payroll administration

Next year we will insource pensioner payroll administration from our current external provider to provide the full end to end service for customers. We believe this will lead to greater operational efficiency and better customer service for members. We have appointed 11 of our experienced administrators to work with the current provider to ensure that the service is transitioned effectively. Their absence and our requirement to backfill them has caused short term resource pressures for us.

Introduction of a work management tool

We are currently investing in a new work management system which will immediately increase the productivity of our staff once its rollout is fully completed in the autumn. Its ability to quickly match different case types against administrator availability, capacity and expertise will help us become more much efficient and productive. We are currently undertaking significant amounts of staff training during the implementation of the system.

New service process – member acknowledgements

We have introduced acknowledgements to members when we receive their applications to help manage their service expectations. As part of this, we will also be undertaking additional triaging steps on receipt of applications to reduce any potential issues or requirements for more information (and hence delays) at later processing stages.

Future updates

All of these activities will create greater operational stability and resourcing as we move ahead. To keep you informed we will introduce a new section in each edition of the Employer Newsletter which will provide you with a monthly update about our service performance. We will also provide updates at our various employer forums.

We hope to deliver a continually improving service going forward and greatly appreciate your continued local administrative support in enabling us to do so.

2. Payment of survivor benefits for unmarried partners

On 8 February 2017, the Supreme Court ruled to allow Ms Brewster's appeal and declared the requirement in the 2009 Regulations of the Local Government Pension Scheme (LGPS) Northern Ireland, that the appellant and her partner should have made a nomination could no longer apply as it was unlawful. As the other underlying Scheme conditions were met, Ms Brewster is entitled to receive a survivor's pension under the scheme.

The implications of the ruling on other public service pension schemes were considered and the effect on the NHS Pension Scheme is detailed below.

Effect of the ruling

The change applies to members with Scheme membership on or after 1 April 2008. This is the date when the provision for nominated partners was brought in for the purposes of the NHS Pension Scheme.

- A partner nomination form (PN1) is no longer required in respect of claims for payment of survivor benefits to unmarried partners.
- Employers should still encourage the use of the partner nomination facility by completion of the PN1.
- In the absence of a partner nomination form, claimants will still need to provide evidence of financial dependency or interdependence in the two years prior to the member's death in accordance with the NHS Pension Scheme regulations.

Action for employers

Any claims must be made using the 'claim for adult dependant's pension on death of an active member (AW9)'.

Where the employer is aware, or becomes aware, of a claim which has been previously rejected or of a partner who has not previously made a claim because they believed there was no entitlement, you should arrange for the 'claim for adult dependant's pension on death of an active member (AW9)' to be completed.

Employers should still encourage completion of the partner nomination form (PN1).

We are still waiting for confirmation of some of the finer details, however we will keep you informed via the Employer Newsletter and our website.

3. Have you seen our new videos?

We understand that people need different levels of information from us, be it a detailed factsheet or a brief article in Ask Us. In response to this we have recently developed several short videos aimed at members. They are intended to provide a high level overview of the different sections of our website and signpost to further detailed information if required.

So far the following videos have gone live:

- Cost of being in the Scheme
- Transferring into the Scheme
- Increasing your pension
- Applying for your pension
- Annual Allowance
- Lifetime Allowance
- Divorce or dissolution of a civil partnership

We also have the following planned for release soon:

- Family and your pension
- Retire and return
- Retire and return after ill health retirement

We encourage you to let your members know that these videos are available. You may also find them useful when speaking with members about their NHS pension or as part as your induction or leaving process. You can find the videos either on the specific web pages or on our [YouTube channel](#).

If you have any suggestions for video topics that will help you explain the Scheme to members please email nhsbsa.communicationsteam@nhs.net

4. Total Reward and Annual Benefit Statements refresh

As you are aware, Total Reward and Annual Benefit Statements were recently refreshed and made available at the end of August 2017.

Last year we carried out a mid year refresh in October which enabled employers to further cleanse data. We have worked with our suppliers and have secured another mid year refresh for 2017.

This means that any annual updates or data changes that have been submitted and successfully processed since the data cut back in June will be included in the updated statements.

To prepare for this, employers now have **two weeks** to carry out further data cleansing in order to help improve the quality of statements available for members for the Scheme year up to 31 March 2017.

You have until 7pm on **Friday 13 October 2017** to submit any outstanding year end updates and to clean any subsequent data errors. The refreshed statements will be available around early December 2017 but further communications will be provided nearer the time.

We would like to thank you in advance for your efforts in providing data to enable as many statements as possible to be made available to members.

5. New employer guides available

A new [abatement basic overview guide for employers](#) is now available on our website. The guide has been created to help employers understand when abatement applies for re-employed pensioners and how we calculate the figures.

[A basic administration guide for General Practitioners \(Medical and Dental\)](#) is also now available on our website to help Practitioners understand how to pension their NHS income.

6. Changes to the retirement benefits claim form (AW8)

Please note that the retirement benefits claim form (AW8) has recently been updated and a new version is now available on our website. The new version of this form will soon also be available in print.

7. Important information when completing form AW8 (pension application form) online

Please be careful when completing an AW8 pension application online. If the member has left pensionable membership and is claiming benefits immediately, the payable date should be the day after the members last day of employment and not their date of leaving.

Example shown below:

Claiming Retirement from

Last day of employment, last day of Scheme membership or 75 th birthday if earlier.
Take account of any periods of leave due and untaken at that date of retirement.

Scheme	Payable Date	Reason for Retirement
2008 <input checked="" type="checkbox"/>	27/10/2015	Age
2015 <input checked="" type="checkbox"/>	27/10/2015	Age

26 October 2015

Next Cancel

8. 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 August are below:

Most viewed article	Hits
How can I calculate the notional whole time salary for a part time staff member?	140
When would it be necessary for me to post an AW8 application form to NHS Pensions?	107
What should I do if I have paid the incorrect amount of contributions to NHS Pensions?	84
How does an employer pay their pension contributions to NHS Pensions?	67
What are final pay controls?	66
What is an AW171 and how should it be submitted?	64
Do I need to submit the SD55 and SD55T when a member is retiring?	58
What are the joiner and leaver forms?	50
How can I apply for Mental Health Officer (MHO) status?	41
How should I submit an AW8 application form if I do not have access to Pensions Online (POL)?	38

9. Pensions Online downtime

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

- 7pm on Friday 13 October and 7am Monday 16 October
- 7pm on Friday 27 October and 7am Monday 30 October

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