

NHS Pensions Employer Newsletter 11 - November 2017

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

1. Sharing our performance
2. Who is eligible to be enrolled into the NHS Pension Scheme?
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1. Sharing our performance - September

Last month we introduced this new section to share our performance and to keep you updated on key activities. It's been a busy month with lots going on.

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 performance) | Completion rate |
|----------------|---|---|-----------------|
| September 2017 | 4762 | 4339 | 91.12% |

In future months we will put the spotlight on other Service Delivery areas to share updates on current performance.

Our business transformation projects

Insourcing of pensioner payroll administration

During September we continued to work closely with our team in Crawley who are working with our current supplier in readiness to transition the service.

Everything is on track for data migration to our pensions processing system (Compendia) in early 2018.

Introduction of a work management tool

The roll out of the new work management tool has now been completed across all Service Delivery areas and is currently going through a period of refinement to ensure productivity measures are at the right level for all staff.

From the detailed management information that the system provides we now have greater visibility, and as such can better understand both the types and level of work on hand, together with any skills gaps. This is enabling us to manage the work in priority order with controlled allocation to the right people, creating greater efficiency.

Process improvements

In September we started sending acknowledgements to members with the aim of keeping them informed and to manage their expectations.

We have also started to triage work in some teams as it's received and this will be rolled out across all teams over the coming weeks. We hope that touching work much earlier will improve the service to our customers as we should be in possession of all the required information ready to process a piece of work within the right timescales.

Other updates

We have carried out a number of Stakeholder Engagement events recently and have more planned. So far this year we have met with over 600 employers across the country. These provide educational support to employers and have been well received.

Keep an eye out for an invitation to an event near you.

2. Who is eligible to be enrolled into the NHS Pension Scheme?

The Scheme is open to any NHS workers aged between 16 and 75 who are:

- Directly employed by the NHS
- Medical, dental and ophthalmic practitioners and trainees
- General medical practice staff
- Non-General Practice Providers

Individuals not entitled to join the NHS Pension Scheme include, but are not limited to:

- Lay Members
- Board members without a contract of employment for other NHS services within that organisation
- Non-Executive Board member (other than GP, GPCC)
- Social Enterprise staff who are not Direction body members of the NHS Pension Scheme

3. HMRC's Lifetime Allowance protection look up service

HMRC have published a [look up service](#) that allows scheme administrators to check the status of a Lifetime Allowance protection certificate.

However, the look up service does not give all the necessary confirmation to allow NHS Pensions to calculate a members Lifetime Allowance position for every member.

Due to the limitations of the look up service NHS Pensions requires that members continue to provide:

- copies of any Lifetime Allowance protection certificates they hold, or
- a hard copy of the electronic notification, if they have been sent an electronic notification from HMRC.

Action for NHS employers:

NHS employers **must** continue to send copies of the certificate/electronic notification to NHS Pensions, to allow the correct calculation of the members Lifetime Allowance position. Failure to provide copies may cause the authorisation of the member's benefits to be delayed, or for a Lifetime Allowance charge to be applied, and the member's benefits to be reduced.

4. Total Reward and Annual Benefit Statements – normal pension age

You may be receiving enquiries from some members of the 2015 Scheme who have transitioned from the 1995 Section who have a normal pension age of 55 in the 1995 Section and their Total Reward or Annual Benefit Statement is stating a normal pension age of 60.

It is important to stress that for all members who this affects, the benefits stated on their statement are correct. However, for certain members the age indicator is incorrectly showing 60 instead of age 55.

If a member's record has not been updated to show that Mental Health Officer (MHO) or Special Class status has ended then their normal pension age will continue to be age 55. Alternatively, if there has been a change to either Mental Health Officer or Special Class status then the normal pension age will be correct. In either circumstance there will be no need for the pension age to be checked.

This is a known issue and is on our plan to resolve hopefully in time for the next annual refresh in August 2018. An update on this will be provided nearer the time.

We apologise for any inconvenience this may cause in the meantime.

5. Ways we have supported employers over the last 12 months

Over the last 12 months we have engaged with employers more than ever before and have worked to improve the service you receive



Hosted **8** stakeholder engagement events across the country so far

Over
600
employers attended



Attend **9** regional pension groups on a quarterly basis



Introduced **employer specific** newsletters



Shared our **performance** in monthly newsletters



Engaged with specific demographics of employer

Managed both the Stakeholder and Employer **email accounts**



Resolved most issues at **first point of contact** and avoiding a triage service



Carried out **regular surveys**



Started offering **data related training** sessions to Regional representatives

Supported new employers



Created **employer technical guides**



Introduced the **Service Improvement and Development Board**

Worked with NHS England / PCSE

6. Data update for non Pensions Online organisations

The Stakeholder Engagement Team will be taking responsibility for the year end 2017/18 process for all organisations without access to Pensions Online (POL).

This will provide more support and guidance to employers throughout the process whilst ensuring a higher accuracy rate for the updating of member records.

Further information and updates will be cascaded in our future employer newsletters. In addition we will also be hosting a year end update training event for non POL organisations across two locations in January.

Invites for this event will be emailed to the main pensions contact held for all non POL organisations. Therefore it is imperative that your organisation's contact details are up to date.

Please ensure the contact details form is completed and returned to our Stakeholder Engagement Team if you have not returned one in the last six months.

7. Have you seen our new videos?

Further to our update last month we can confirm that the following videos have gone live:

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

The videos are intended to provide a high level overview of these areas and signpost to further detailed information if required.

Please 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

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 September are below:

| Most viewed article | Hits |
|---|------|
| How can I calculate the notional whole time salary for a part time staff member? | 146 |
| When would it be necessary for me to post an AW8 application form to NHS Pensions? | 103 |
| What are the joiner and leaver forms? | 99 |
| What should I do if I have paid the incorrect amount of contributions to NHS Pensions? | 93 |
| What are final pay controls? | 74 |
| How does an employer pay their pension contributions to NHS Pensions? | 73 |
| What is an AW171 and how should it be submitted? | 65 |
| Do I need to submit the SD55 and SD55T when a member is retiring? | 65 |
| How should I submit an AW8 application form if I do not have access to Pensions Online (POL)? | 47 |
| How can I apply for Mental Health Officer (MHO) status? | 35 |

9. Pensions Online downtime

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

- 7pm on Friday 3 November and 7am Monday 6 November
- 7pm on Friday 10 November and 7am Monday 13 November

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 next issue of the Employer Newsletter will be published in mid December.