NHS Pensions Employer Newsletter 2 - March 2018

1. Sharing our performance – January 2018
2. Year end update events for non Pensions Online (POL) employers
3. Important changes to application forms
4. Extended Pensions Online (POL) downtime
5. Organisations who outsource their pensions activity to third party providers
6. Pre-retirement course presentation
7. GP Practices who submit NHS Pension Scheme contributions via Pensions Online
8. General Data Protection Regulations (GDPR)
9. Employer Charter
10. Employer Newsletter distribution list
11. Contacting us by email
12. Change of postal address for HMRC Pension Schemes Service
13. Most viewed Ask Us articles
14. Pensions Online downtime

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

1. Sharing our performance – January 2018

Our current performance

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

	Number of awards due to be paid in month (our target)	Number of awards cleared within the month (our performance)	Completion rate
JANUARY 2018	4,369	4,289	98.17%

Our new work management tool continues to greatly assist Service Delivery to manage the monthly peak periods by the way it allocates the work to the administrators. It enables us to address the work queues at different points of the processing journey to ensure it flows through in a much more efficient way. It is also having a positive impact to the volume of overall work on hand.

As an example, these efficiencies have enabled us to make good progress on the recovery plans for both Officer and Practitioner sub awards. The Practitioners plan is on track for completion for the end of March. Since October 2017 the volume outstanding has reduced from 1,300 to just 300 and the Officers plan also remains on track for completion by the end of August 2018 with a reduction of 1,500 cases since the exercise began.

We are entering our peak processing period for Awards in February and March. We tend to see a spike in people retiring at the end of March and we are starting to see these applications coming in with over 2,100 received so far, which the team are already working on. Over 300 have already been completed and the members notified in good time for their retirement date. We will update you again next month with how this peak period is progressing.

We are expecting some system downtime in the coming weeks as we start the process to integrate the Pensioner administration and payroll activity into the end to end service. More detail of this and how the service will be affected during this time will be provided in greater detail at the end of March.

2. Year end update events for non Pensions Online (POL) employers

Over the last few months, the Stakeholder Engagement Team has been providing information to non Pensions Online (POL) organisations about changes being made in 2018 with the annual update process. To support employers through these changes the team:

- have hosted two events in Leeds and London providing around 150 pensions administrators with the opportunity to learn more about the non POL end of year process and ask any questions about this new process.

- are in the process of hosting six conference call events from 27 February to 1 March to give employers unable to attend the face to face events the opportunity to learn more about the non POL end of year process and ask any questions they have.

- have provided question and answers online which can be found at www.sli.do (event code 5017). The questions raised at the events now have online responses so that all employers can see the answer. You can ask questions via Slido about the non

POL process and the Stakeholder Engagement Team will respond on a weekly basis.

To further support employers that were not able to attend the events above, we will publish the slides from the event and a copy of the non POL end of year submission guide on the resources page of our website.

A copy of the questions and answers will be added to the resources page of the website in March.

Non POL employers now have until 31 May 2018 to submit their end of year spreadsheet to nhsbsa.stakeholderengagement@nhs.net

3. Important changes to application forms

The following forms have recently been updated to include an additional option within the applicant's declaration and consent section.

- Consideration of entitlement to ill health retirement claim form (AW33E)
- Consideration of entitlement for early payment of preserved benefits due to ill health claim form (AW240)
- Application for permanent injury benefit claim form (AW13)

Applicants now have the option of seeing any medical report produced by the Scheme's Medical Advisers prior to NHS Pensions receiving a copy. As per the December / January newsletter, incomplete or outdated versions of the forms will not be processed and a letter will be sent to both the member and employer detailing this.

The new versions of the documents are:

- AW33E   V14
- AW240   V11
- AW13   V7

These are available to download from our website. The latest version of the AW33E is also available to order in hard copy.

4. Extended Penions Online (POL) downtime

We would like to **provisionally** inform you that Pensions Online (POL) will be unavailable from **7pm on Thursday 15 March to 7am Tuesday 20 March**. This is so we can carry out testing on the new IT infrastructure that will support the transformation of NHS pensioner administration and payroll.

We will confirm these dates as soon as possible so please look out for messages on the POL homepage and on the website.

More infrastructure changes are planned over the coming months. We will be taking a phased approach to ensure minimal disruption to you and our members and will communicate with you as soon as we can when we know that POL will be affected.

5. Organisations who outsource their pensions activity to third party providers

Please remember that if you outsource your pensions activity to a third party provider, it is your responsibility for ensuring the administration of the NHS Pension Scheme is:

a) carried out in a timely manner and is in line with the Scheme regulations
b) is accurately reflected through the updating of member records.

This responsibility lies solely with you as the direct employer to make sure these things happen and to address any issues if the outsourced provider is not providing the service they are contracted to undertake on your behalf (Employer Charter part 2.1 page 6 refers).

Going forward, where issues are identified we will make you aware to enable you to take appropriate action.

6. Pre-retirement course presentation

We have produced a presentation that you can use to provide information to members at pre-retirement courses. This has been developed with input from employer representatives on the Service Improvement and Development (SID) Board, and has received positive feedback from employers who have trialled it.

The presentation is available to download from a new webpage within the Employer Hub called 'Resources'. Over the next few months we will add additional resources to this page to help you deliver key messages to your members.

We are producing a video and checklist for pre-retirement courses and will then be looking at materials to help at inductions for new joiners.

Keep an eye on this webpage and the Employer Newsletter for new products. We ask that you always access resources from this webpage as when updates or amendments are made to individual products, you will be accessing the most up to date version.

We are keen to hear your feedback. Please send any comments or suggestions on our pre-retirement course presentation to nhsbsa.stakeholderengagement@nhs.net.

7. GP Practices who submit NHS Pension Scheme contributions via Pensions Online

Please note: This article and the letter attached with this newsletter are for the attention of GP Practices who submit NHS Pension Scheme contributions via Pensions Online (POL) only.

There will be a change of banking arrangements taking place at the end of March 2018.

The changes will only involve the transfer of GP Practice Direct Debit instructions used to collect NHS Pension Scheme contributions. Currently they are held separately and will be transferred over to the NHS Pension Scheme primary collections bank account under the new arrangements.

Please see the letter attached for further details.

Further changes are due to take place in the coming months regarding the bank account used by GP Practices who **do not** use Pensions Online to make their contribution payments. Details of these changes will be announced in the next Employer Newsletter**.**

8. General Data Protection Regulations (GDPR)

We are starting to receive a few queries from employers about how we collect and share data, and how this may change or have an impact on the data you hold. Our GDPR project is currently looking at our processes and data requirements. We will keep you informed through the Employer Newsletter over the coming months. Our updated privacy statement will be available on our website by the end of April.

Remember – we will be updating many of our forms and guides with updated declarations, consent and privacy notices. Please do not stockpile any documentation as it is important that the latest versions are used when they are available. Updates will be provided in the next newsletter.

9. Employer Charter

The Employer Charter has recently been through a thorough review including contributions from the employer representatives of the Service Improvement and Development (SID) Board. The latest version is now available on our website.

The Charter explains the roles and responsibilities of Scheme employers. It aims to provide you, as employers, with total clarity on your local scheme administration obligations and summarises what you can expect from us.

10. Employer Newsletter distribution list

The Employer Newsletter is automatically sent to the email address we hold on record for the main pensions contact at each organisation. Therefore it is important that contact details are kept up to date.

The contact details we hold for your organisation can be checked and updated on Pensions Online. If you don't have access to Pensions Online, you can complete and return the employer organisation contact details form which is available on our website.

In addition, we also hold a secondary distribution list with contacts that have subscribed who aren't recorded as our primary contact. We will be contacting everyone on this list shortly to ensure email addresses are correct and that they still require the newsletter. As part of this exercise, anyone on this list will need to re-subscribe using an online subscription form to comply with upcoming GDPR regulations. However, if you receive this email but you should be the primary contact, contact us to update the details we hold for your organisation but do not re-subscribe.

11. Contacting us by email

In order to prevent double handling and potential delays, please only direct each query into the one relevant account.

Below are the accounts that NHS Pensions expect employers to use and the reasons the account should be used for:

Account name/address	Purpose	Expected response times
nhsbsa.pensionsemployers@nhs.net	• All general employer queries and case progress updates • Any supporting documentation/information relating to a request	2 working days
nhsbsa.datamanagement@nhs.net	• All queries in relation to data issues	3 working days
nhsbsa.polhd@nhs.net	• All queries relating to Pensions Online	3 working days
nhsbsa.stakeholderengagement@nhs.net	• Meetings and Forums • Educational needs • Escalation issues	3 working days

	• Website and Ask us information	

There are a number of other accounts that we use to request information from employers. These accounts should only be used to respond with the requested information and not generate new queries.

12. Change of postal address for HMRC Pension Schemes Service

Should any member wish to write to HMRC in respect of their Annual or Lifetime Allowance, HMRC's postal address has changed to:

Pension Scheme Services
HM Revenue and Customs
BX9 1GH
United Kingdom

13. 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 January are below:

Most viewed article	Hits
How can I calculate the notional whole time salary for a part time staff member?	139
When would it be necessary for me to post a retirement benefit claim form (AW8) to NHS Pensions?	123
What are final pay controls?	101
What should I do if I have paid the incorrect amount of contributions to NHS Pensions?	94
How does an employer pay their pension contributions to NHS Pensions?	84
What are the joiner and leaver forms?	76
Do I need to submit the SD55 and SD55T when a member is retiring?	72
How can I apply for Mental Health Officer (MHO) status?	70
What is an AW171 and how should it be submitted?	66
How should I submit an AW8 application form if I do not have access to Pensions Online (POL)?	60

14. Pensions Online downtime

Pensions Online (POL) will be unavailable between:

- 7pm on Friday 2 March and Monday 5 March 2018
- 7pm on **Thursday** 15 March and 7am on **Tuesday** 20 March (provisional)

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 (April) of the Employer Newsletter will be published at the end of March 2018.