

NHS Pensions Employers Newsletter - August 2018

1. Sharing Our Performance

| Month | Number of new awards due to be paid in month (our target) | Number of new awards cleared within the month (our performance) | Completion rate |
|-----------|---|---|-----------------|
| June 2018 | 2936 | 2198 | 74.86% |

On 4 June we transitioned the Pensioner administration system from our previous supplier Equiniti and brought the work in-house. This resulted in a number of system changes for our administrators to learn and new work for them to process. Overall this was managed well but with change on this scale it was unlikely to happen with no impact.

Just to put the scale of this change into context:

- System upgrade to include facility to record Pensioner data in the Pensions Operating system Compendia
- Data Migration was carried out to migrate over 900,000 Pensioner records into Compendia which equated to 1.08 billion rows of data
- New processes transitioned from the previous supplier into the administration team
- £548 million paid to 667,357 pensioners since 2 July when NHS Pensions fully took over the service

There are still some residual Compendia issues which are being resolved in priority order, you may feel the impact from time to time as we bring systems down at short notice to apply fixes. We do try to minimise the impact on employers and our administrators however this may not always be possible.

Awards remain the most critical area and we are concentrating our efforts on recovery very closely. We have invoked our contingency plan and to better understand the work involved in the recovery, included below is a table of the volume of awards that have passed their target.

| Awards | Volume |
|-------------------------|--------|
| Remaining for June | 63 |
| 01/07/2018 – 08/07/2018 | 49 |
| 09/07/2018 – 15/07/2018 | 394 |
| 16/07/2018 (Peak day) | 570 |
| 17/07/2018 – 22/07/2018 | 788 |
| 23/07/2018 – 29/07/2018 | 659 |

Some of the actions in the contingency plan are noted below:

- Assessments of the cases above have shown that 29% are at the final stages and the team are focused on clearing these first
- We have assessed other areas of the business and temporarily re-aligned resources from non-critical areas to improve daily clearance
- We are having target days focused on specific activity to move more awards faster through the processing cycle
- Constant monitoring of upcoming awards

We are already starting to see improvements, however to keep you informed, we will provide a further update by Friday 17 August 2018 via an email to all employers.

Call Referral volumes remain slightly higher than forecast but again this is expected to improve every day as we see the numbers above reduce.

2. TRS Go Live

- **Annual refresh**

Following the TRS Pensions data cut on the 22 June, the pension calculations have now been completed and passed across to our ESR colleagues to create the new statements.

In accordance with the current timeline, it is anticipated that the refreshed statements will be made available from 9am Wednesday 22 August 2018.

- **Access**

On 12 July the replacement service for Government Gateway access to Total Reward Statements went into private beta allowing a selected number of members to access their TRS using the new digital service via a secure UK Government-wide verification service called Verify.

During the private beta period members who contact the NHSBSA call centre will be given the opportunity to use the new service to test its robustness and early indications are that it has been well received.

3. Completing the Service Membership Form SM1

Following a recent determination by The Pension Ombudsman we have revised our guidance to employers to confirm how duties should be assessed when determining Mental Health Officer (MHO) status for a member of the 1995 Section of the NHS Pension Scheme.

The SM1 form asks employers to split duties between 'hands on' care and treatment (i.e. direct patient contact) and duties where there is no direct contact with the patient.

The 'care and treatment' that counts towards MHO status requires the actual presence of a patient with a mental health condition. This means that only the time spent actually treating a patient (i.e. where they are physically present) should be recorded on the relevant section on the SM1.

Duties where the patient is not present such as team meetings, meetings about a specific patient, meetings with a patient's relatives or carers, writing reports, updating medical notes, or any other duty where the patient is not present, must be recorded as duties not involving direct care and treatment on the SM1 form

If there is any doubt about eligibility for MHO status employers should contact the NHSBSA providing further information.

4. Injury Benefits Permanent Injury form

The NHS Injury Benefit Scheme is only available to applicants who have sustained an injury or contracted a disease on or before 30 March 2013.

The Injury Benefit Regulations were amended for any applicants who left NHS employment **on or after 31 March 2018** in that it is now the responsibility of the applicant to provide compelling evidence to support their application.

Due to the above changes and the requirements of GDPR, the application form for Permanent Injury Benefits has now been amended and there are now two forms on the website. These are the only forms that will be accepted.

The original application form for Permanent Injury Benefits, known as form AW13, is for applicants who have sustained an injury or contracted a disease **on or before 30 March 2013** and who left employment or

commenced lower paid NHS employment **on or before 30 March 2018**. Please ensure the relevant documents noted in the guidance notes and on page 6 of the application form are included, or we will not be able to process the application.

There is a new application form, known as form AW14, which is to be completed for applicants who have sustained an injury or contracted a disease **on or before 30 March 2013** but have left employment or commenced lower paid NHS employment **on or after 31 March 2018**. The applicant will need to provide compelling evidence in order to make a claim. More details can be found in the guidance notes.

If you have any queries you should contact the Injury Benefits helpline on 01253 774957 or email nhsbsa.injurybenefitsenquiries@nhs.net.

5. Re-assessing tiered contribution rates

The general basic rule is that a contribution tier for existing Officers Scheme members is set using the previous years' pensionable earnings or whole time equivalent for members working part time. This is unless there has been, or there is, a change in circumstances including any pay increase. Where this occurs employers are required to carry out a reassessment and apply the correct contribution rate. It is important to note that where a pay rise is mid-year any increase in tiered contributions must be assessed at the point the pay rise occurs. This cannot be done retrospectively at the end of the year.

This means that following the implementation of the pay awards for staff on Agenda for Change, employers will need to arrange for regular re-banding exercise's to take place. This ensures each member is paying the correct amount of contributions from the date in which the pay increased. Please note this pay award does not affect those staff that are not covered by Agenda of Change .i.e. practice staff, Independent Providers staff, Direction body staff, General Practitioners & Non-GP Partners.

The cost of living increase and pay increase may happen on a different date dependant on the members pay step (increment) date. This means that organisations will have to identify members affected by this on a monthly basis and re-asses their pension contributions and bandings to reflect this where appropriate.

For more information regarding tiered contributions please refer to our [factsheet](#). Further guidance regarding the pay award changes can be found on the [NHS Employers](#) website.

6. Annual Employer Satisfaction Survey 2017/18

In 2017/18 we focused on obtaining feedback from both members and employers to allow us to implement changes within our business or reaffirm that our current processes are fit for purpose.

The 2017/18 Annual Employers Survey will be released in October and we encourage all employers to share their individual feedback so that we have a representative set of results reflective of the organisations that access the NHS Pension Scheme.

The Annual Satisfaction Survey will be sent to the main EA pensions contact we hold and will take five minutes to complete. The survey is an opportunity to share your views on a number of areas, including the service currently being offered by NHS Pensions, the additional ways we have supported employers in 2017/18 and also the changes that have been made as a result of our insight surveys, which focused on specific business areas.

Over the next few months, we will start to include information on changes that have been made following employer and member feedback and the benefits of making these changes.

7. Ask Us

Employer:

| | | |
|---|--|----|
| 1 | How can I calculate the notional whole time salary for a part time staff member? | 13 |
| 2 | When would it be necessary for me to post a retirement benefit claim form (AW8) to NHS Pensions? | 12 |
| 3 | What should I do if I have paid the incorrect amount of contributions to NHS Pensions? | 2 |
| 4 | How does an employer pay their pension contributions to NHS Pensions? | 10 |
| 5 | How can I apply for Mental Health Officer (MHO) status? | 5 |
| 6 | Ethnicity codes | 10 |
| 7 | What are the joiner and leaver forms? | 2 |
| 8 | How long do I need to keep an employee's pension forms? | 65 |
| 9 | Do I need to submit the SD55 and SD55T when a member is retiring? | 65 |
| 1 | | 61 |
| 0 | What is the NHS Pension Scheme Registry Number? | 59 |
| | | 56 |
| | | 55 |

Member:

| | | |
|----|--|------|
| 1 | Where can I find my SD number? | 1922 |
| 2 | How can I get an estimate of my NHS pension benefits? | 964 |
| 3 | What are the reduction factors for Actuarially Reduced Early Retirement in the 1995 section? | 912 |
| 4 | Can I return to NHS work after retiring from the 1995 section of the Scheme? | 565 |
| 5 | What is a deferred benefits claim form (AW8P) and when should it be completed? | 448 |
| 6 | Where can I obtain advice relating to my NHS Pension? | 399 |
| 7 | Can I take Actuarially Reduced Early Retirement? | 300 |
| 8 | How do I claim a refund of my NHS Pension contributions? | 273 |
| 9 | What is an AW8 application form and when is it completed? | 256 |
| 10 | How will my NHS Pension be paid? | 253 |