

## **NHS Pensions Employer Newsletter – June 2019**

### **1: Sharing Our Performance:**

#### **First Awards**

A total of 3751 applications have been processed so far in May of which 96.91% were paid on time.

#### **Bereavements**

Bereavements is progressing through recovery and reaching some stability. A number of activities are on-going to prioritise bringing the work back within targets soon, with the total outstanding work volumes decreasing daily.

#### **Revised Pensions (AW171)**

Steady progress has been made as we re-commence processing revised pensions in a controlled environment. The insourcing of payroll changed how we must process these cases as the calculation and payment of revised pensions are now all processed from NHS Pensions systems and not through a third party.

The training of the staff on the new business process for revised pensions is going well and we are seeing a greater throughput against our daily clearance plans than we initially anticipated which is really encouraging at this early stage.

The 2<sup>nd</sup> stage of the Compendia development is due to be delivered later in the year but due to the processes we have put in place, we have found it is not preventing us from processing work through the system. Again, this is great news.

All the work has now been triaged which is making the training and allocation of work to staff much easier and will hopefully help us increase clearance as they become more proficient. Once we fully understand timings for the new end to end process we will be able to finalise the plan and share our anticipated recovery date with you, but until then be assured we are taking all steps possible to stabilise this work.

## **Contact Centre**

Calls to our Contact Centre remain higher than average even though we are nearly through our first main peak period of the year, so customers may still feel a longer wait time on all four pension lines (employer, member, TRS and payroll) but this continues to fluctuate daily. During April across all four lines, we received a total of 68,024 calls. Each call on average took approximately 7 minutes 29 seconds to resolve and customers were waiting around 30 minutes for their call to be answered. So far in May we have received 72,670 calls with each call taking on average 7 minutes 41 seconds and customers were waiting approximately 41 minutes for their call to be answered.

In the short term, we continue to have messages on the lines to further support customers at this busy time. However, as a longer term solution we are recruiting more call handlers to help reduce the wait times to improve the on-going service to our customers.

## **ESR Year-end updates 2019**

We are pleased to inform you that the 2019 ESR Year-end data processing is now complete with a total of 1,412,454 annual updates being applied over the last five weeks. Over the latter couple of weeks we have spent time catching up on the April joiners and leavers and May joiners to bring processing fully up to date.

We will now commence the preparation of the annual heat maps to report the data processing successes to ESR employers, currently scheduled for distribution by the end of July 2019.

## **TRS Refresh 2019**

Just a reminder that the TRS data cut for the annual refresh will take place after 7pm on Friday 21 June 2019, with refreshed statements being made available by the end of August 2019. The data cut will capture successfully updated records up to and including 31 March 2019, so please ensure you have updated your employee pension records and cleansed any data errors by this date.

## **POL downtime**

During June there is currently the following scheduled downtime:

Friday 22 June 7pm – Monday 24 June 7am

Friday 29 June 7pm – Monday 1 July 7am

## 2: MCP Rollout to all employers

Following the completion of a questionnaire on the way in which employers pay pension contributions on a monthly basis, we have now begun to register and on-board employers onto our new digital service, Make Contribution Payments (MCP).

Our initial tranche focused on single EA code employers where the main EA contact completes the GP1/RFT1/DIR6 on the organisations behalf. There are now over 2,000 employers registered on the system who should have all received usernames, passwords and instructions on how to access the new system.

These organisations should now start to use MCP on a monthly basis to submit contributions and stop using the GP1/RFT1/DIR6.

There is now a dedicated link to the MCP system, frequently asked questions and contact points on the finance pages of our website - <https://www.nhsbsa.nhs.uk/employer-hub/nhs-pensions-finance>

Over the coming months we will start to focus on our remaining employers in the following order:

1. Employers who have not yet returned a completed questionnaire or where the main EA contact indicated that another individual is responsible for submitting the GP1/RFT1/DIR6.
2. Organisations which have indicated that they administer for a number of different EA codes or use a professional service provider who is responsible for submitting contributions on their behalf.
3. Organisations which currently do not have Direct Debit arrangements in place.

It is imperative that employers continue to pay contributions using their existing arrangements until they receive the MCP welcome letter. MCP is only replacing the paying over of contributions functionality that Pensions Online offers. All other submissions of information (joiners, leavers, cyclic updates and general administration) should be input on Pensions Online.

Further updates will be included in future newsletters.

## 3: Annual Allowance

Employers are required in legislation to provide information to NHS Pensions which enables Pension Savings Statements to be provided to members. This statement informs members whether they have exceeded the Annual Allowance limit in the NHS Pension Scheme. The requirements specify that employers must provide pay (and membership) information to NHS Pensions by 6 July following the end of the tax year.

We are expecting an influx of requests for Annual Allowance statements in July. In order to be able to respond to these requests, we must have the available pay and membership information from employers for 2018/19 **by 6 July 2019** (information for previous years should already have been received). If the member's record is not updated by the employer

by this date, HM Revenue and Customs (HMRC) may impose fines and charges on employers of:

- Up to £300 per member, and
- £60 per day per member until the member's records are updated

If the information is not provided, we will not be able to conduct the necessary calculations to check whether the member has exceeded the Annual Allowance limit. We will not be able to generate a Pension Savings Statement and notify potentially affected members in a timely manner. Members could be subject to fines and late payment penalties from HMRC.

Special arrangements were made for PCSE/NHS England in relation to the provision of information for GPs once their end of year certificates have been received and the provision of pension information to NHS Pensions after HMRC's deadline.

## **4: Membership enquiries**

The website membership enquiry process will be updated to include Retrospective and Part Time Access (PTA) as well as a few smaller changes with the existing standard membership. The volume of Retrospective and PTA membership enquiries is relatively low but the application process has been improved to provide up front guidance and dedicated application forms, to mirror the process for standard membership enquiries.

The main focus is to provide web guidance for employers, the Customer Contact Centre and NHS Pensions to be able to refer members to, in order to promote self-help and reduce unnecessary contact. Dedicated application forms are then provided for genuine enquiries which ensure all the relevant information is provided first time around and to the correct stakeholder, further reducing double-handling.

Much of the new content is provided for the member but a new 'all-in-one' employer membership guide has been provided in the Employer Hub and explains the end-to-end processes for both the member and employer. The key changes are noted below:

### **Employer Hub documents**

- Membership enquiry factsheet – New all-in-one guide covering all aspects of membership enquiry
- Membership enquiry questionnaire (SM27D) – Existing employer reply with a few minor changes
- Retrospective membership enquiry response (SM Retro2) – New employer reply form specific to answering retrospective membership requests

## Member Hub documents

- Membership records factsheet – Existing factsheet renamed with a few minor changes
- Standard membership enquiry factsheet – New guidance to help members make an enquiry about missing or incorrect membership
- Retrospective membership enquiry factsheet – New guidance to help members make an enquiry if they think they have not been correctly enrolled into the pension scheme
- Part time access membership enquiry factsheet – New guidance specifically for some part time workers who had not been given access to the 1995 Section prior to 1 April 1991
- Membership statement request (SM27A) – Existing 1995/2008 Section membership statement request with a minor change
- Membership enquiry with employer (SM27B) – Existing Standard membership enquiry with the employer with a few minor changes
- Membership enquiry with NHS Pensions (SM27C) – Existing Standard membership enquiry with NHS Pensions with a few minor changes
- Retrospective membership application (SM Retro1) – New application form with the employer specifically for retrospective membership requests
- Part time access membership application (SM PTA1) – New application form with NHS Pensions specifically for Part time access requests

The guidance and application forms will be updated shortly after the release of this newsletter.

If you have any questions or improvement suggestions of your own, please contact: [nhsbsa.stakeholderengagement@nhs.net](mailto:nhsbsa.stakeholderengagement@nhs.net)

## 5. General Practitioner annualisation reimbursement of employee contributions deadline

In December 2018, NHS Pensions released the GP reimbursement forms for years 2015/16 and 2016/17.

A GP seeking reimbursement of employee contributions must complete this form in full and forward it (along with evidence of their eligibility) to PCSE (England) or the Local Health Board (Wales) by **14 June 2019**. Any reimbursement claims made after 14 June 2019 will be rejected. If the GP worked in both England and Wales then separate forms must be completed and submitted

All forms and further guidance can be located on the [practitioner page](#) of our website.