

NHS Pensions Update – November 2019

Total Rewards Statements & Annual Benefit Statements refresh

The TRS & ABS mid-year refresh is underway and the data cut was taken on Friday 11 October 2019. The pension calculations and checks are now complete and the data was transferred to ESR on Friday 1 November 2019.

We expect to be able to make the statements available from Wednesday 18 December 2019. The TRS service will be unavailable from 4pm on Thursday 12 December to enable the upload of the refreshed statements to take place. The service will come back on line from Wednesday 18 December 2019.

We will notify you via email once they become available so you can advise your employees.

Members achieving maximum pensionable membership

When completing SD55 termination form for members who have achieved maximum pensionable membership, are no longer eligible to contribute and have a last day of pensionable membership as the date they achieved maximum membership, the reason for termination will be exit code 11.

Using exit code 11:

- Will prevent incorrect payable dates being generated when awarding pension benefits
- Will ensure any death benefits that may become payable are calculated correctly, as these members are entitled to death in service benefits

Finance contribution collection

The Contribution Collection area of the NHS Pensions Finance web page has been updated to include information regarding the payment of pension contributions, premature early retirement, injury benefit, final pay control costs and late payment invoices.

The new content list is as follows:

Contribution collection

- Payment schedule and timetable
 - 2018-19
 - 2019-20
- Submitting contributions via the Make Contribution Payments (MCP) System
 - About Make Contribution Payments (MCP) system
 - Setting up a Direct Debit Mandate (DDM)
 - What to do if you have submitted incorrect contribution figures
- Non-payment and late payment of contributions
 - Non-payment (process and escalation)
 - Late payment (charges and payment of charges)
 - Late payment charging
 - Payment of late payment invoices
- Other contributions
 - Premature Early Retirement costs (Compensation)
 - Final Pay Control (FPC)
 - Injury Benefit Costs
- How to contact the NHS Pensions Finance team

Employers can contact us by email: nhsbsa.pensionsfinance@nhs.net

Best Practice 2019 update

Colleagues from Information Services, Pensions and Scanning came together on 6-7 October at the Best Practice Show in NEC Birmingham, to promote NHS Business Service Authority (NHSBSA) services to various NHS professionals. With over 260 visitors to the NHSBSA stand, it proved to be one of the busiest events of the year to build relationships, both at the stand and through presentations.

Chris Dawson and Angela Williams from the Pensions team gave an excellent overview of the service in their presentation 'NHS Pension - Explained'. Over 130 people crammed into the 60 seater theatre to hear the session and many more came to the stand after. Danielle Adair and Jonathan Leach from the team manned the stand throughout the day fielding queries and questions.

TUPE and claiming benefits

If a member wants to retire during a TUPE consultation or pending a TUPE, a 24 hour break in service must be taken before benefits are claimed.

This includes new employers (receiving organisation) applying for continued NHS Pensions access for employees under Direction / Determination or New Fair Deal.

This is because once the TUPE has been approved by the Department of Health and Social Care (DHSC) it is classed as continuous service for NHS Pension purposes, meaning that the member would not have taken a 24 hour break if they claimed their pension on the last day of service for the original employer.

If a member chooses to claim their pension on leaving the existing employer, they will not be part of the TUPE therefore they will only be able to contribute to the NHS Pension Scheme with the new employer if the new employer has the relevant scheme access and the member is eligible.

The Scheme Access Team will notify the new organisation of the members that will not be eligible to contribute following the TUPE once the Direction / Determination has been approved by the Department of Health and Social Care.

Any queries regarding access to the NHS Pension Scheme following TUPE should be sent to the Scheme Access Team at nhsbsa.schemeaccess@nhs.net

Requests for information from employers for data queries

We are currently reviewing how we request information for member's records with missing data or to amend incorrect data. The accuracy of this data is essential to ensure members can access up to date Total Reward Statements, Annual Allowance Statements or any other information about their pension.

Currently, we will keep requesting this information from employers until the query has been resolved and the data error can be cleared. We don't have a standard approach and this has resulted in a variance in the standard of service that is provided.

Revised process

With effect from 1 December 2019, the way in which information is requested will be standardised. The process is in line with the current Employer Charter where a response from the employer is expected within 20 working days.

The new process is as follows:

- All requests will initially be sent via email and the case will be placed in a 'pending' queue for 20 working days
- If a response has not been received after 20 working days, the administrator will attempt to contact the employer via telephone to ensure we hold the correct contact details.
- The employer can provide the information over the phone or ask for the information request to be emailed again. The case will be placed in the 'pending' queue for a further 5 working days if required
- If no response has been received, an escalation email will be sent to the Finance Director and the case will be placed in the 'pending' queue for 10 working days
- If no response has been received, we will contact the member to inform them that we are unable to update their record

We welcome any feedback from employers about the new process as we aim to work collaboratively with employers to ensure that collectively the customer is primary focus of all the work we carried out.

Any feedback should be provided to our Stakeholder Engagement Team.

Greenbury

Disclosure of senior managers' remuneration (Greenbury) 2020

We anticipate that the Greenbury functionality within Pensions Online (POL) will be available from Monday 6 January 2020.

Requests for disclosure information should be received by NHS Pensions between 6 January 2020 and Friday 28 February 2020 to enable us to provide you with the necessary disclosure information by 1 April 2020.

This will allow you time to prepare and submit your draft accounts by noon Friday 24 April 2020. Please note, we can't guarantee that requests or queries received after 28 February 2020 will be dealt with by 1 April 2020

- **Who should employers request Greenbury figures for?**

The Department of Health and Social Care Group Accounting Manual (GAM) 2020-21 states the remuneration report must disclose information on those persons in senior positions having authority or responsibility for directing or controlling major activities within the group body. This means those who influence the decisions of the entity as a whole rather than the decisions of individual directorates or departments.

The GAM goes on to say: The Chief Executive or Accounting/Accountable Officer must be asked to confirm whether this covers more than the executive and non-executive directors (for CCGs – attendees at Governing Body meetings). It is usually considered that the regular attendees of the entity's board meetings are its senior managers.