

## NHS Pensions Updates – February 2020

### Sharing our performance

*Table 1- Total Transactions*

Item	Volume
Total Transactions	16,774
First Retirements	5,148
Revised Retirements	2,356
Estimates	1,812
Re-Employment Cases	1,764
Transfers In	248
Transfers Out	784
5 Year-Rejoiners	41
Pensions on Divorce	48
Life Assurance Lump Sums	241
Partner Pensions	697
Child Allowance	106
Refunds	3,529

*Table 2 - First Retirements and Pensioners*

Item	Volume
Applications Processed	5,148
On Time	99.81%
Amount paid in Lump Sums	£210,670,279.70
Amount of Pension Paid	£764,885,343.49
No. Pensioners in Payment	972,804

*Table 3 - Employer Helpline statistics*

Item	Volume
Total Volume Calls	2,800
Average Handling Time (s)	352
Average Speed of Answer (s)	23

*Table 4 - Member Helpline statistics*

Item	Volume
Total Volume Calls	31,337
Average Handling Time (s)	444
Average Speed of Answer (s)	15

## **AVC, AP and ERRBO email addresses change**

The following email accounts are no longer active:

- [Nhsbsa.avcteam@nhs.net](mailto:Nhsbsa.avcteam@nhs.net)
- [Nhsbsa.apconfirmpayment@nhs.net](mailto:Nhsbsa.apconfirmpayment@nhs.net)

If you have an email query regarding AVCs (Additional Voluntary Contributions), AP (Additional Pension), or ERRBO (Early Retirement Reduction Buy Out) please contact us at [nhsbsa.apavcreferrals@nhs.net](mailto:nhsbsa.apavcreferrals@nhs.net)

## **NHSPS Employer Contributions**

The NHS Pension Scheme employer contribution rate increased on 1 April 2019 from 14.38% to 20.68%. The Department of Health and Social Care's consultation response announcing the rise, published in March 2019, confirmed the available funding to meet the associated costs and that a transitional arrangement would operate in 2019/20 where employers in the Scheme would continue to pay 14.38%.

Although our expectation was that this arrangement would only be in place for 2019/20, we can now confirm that the transitional approach will continue in 2020/21 in order to maximise stability for employers in the sector.

This means that for 2020/21, all employers should continue to pay 14.38% in employer contributions under their normal monthly payment process to the NHS Pension Scheme. NHS England will continue to make payments to the scheme for organisations covered by the commitment to the NHS.

As referenced in the consultation response, the 6.3% increase was split into two elements: i) a 2.5% foreseen element, which was the increase expected at the time of Budget 2016, and ii) an unforeseen element accounting for the remaining 3.8%.

Organisations outside the scope of the commitment to the NHS will receive funding for the unforeseen costs and will have to manage the impact of the foreseen element, in a continuation of the 2019/20 arrangement.

For 2020/21, non-NHSE ALBs will continue to receive the same available funding support; however, there will be an adjustment to the administrative arrangements which will be communicated directly to relevant organisations.

For more information: <https://www.nhsbsa.nhs.uk/employer-contribution-rate-arrangementsremain-202021>

## **Incorrect forms for membership enquiries**

We are still receiving membership enquiries on incorrect forms. Please be reminded of the processes below as advised in the June 2019 newsletter.

The website membership enquiry process has been 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 in order to promote self-help and reduce unnecessary contact. Dedicated application forms will be provided for enquiries which ensures relevant information is provided first time 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

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

## **Applications for Protection of Pay (where pay is reduced)**

This is a further reminder for employers to ensure that any applications for Protection of Pay or Voluntary Protection of Pay are submitted to NHS Pensions within the relevant time limits. Also, that sufficient, supporting information is included with your application to enable our consideration.

Please note that we cannot guarantee acceptance of applications which are late or do not include sufficient information about the reasons for the reduction in pay.

Applications must be made via the forms SMR9 and SMR9EA. The forms and accompanying Factsheet are available on our website at:

<https://www.nhsbsa.nhs.uk/employer-hub/technical-guidance/pay-and-contributions>

The time limits for applications are:

- **Protection of Pay (through no fault of the member)** – applications must be submitted to us within three months of the reduction in pay
- **Voluntary Protection of Pay** - applications must be submitted to us after 12 months but within 15 months of the reduction in pay

It is essential that you provide detailed reasons for the reduction in pay and these should always be supported by documentary evidence wherever possible. This will also help to avoid unnecessary follow up enquiries.

## **Make Contribution Payments (MCP) update**

Employers using MCP to submit their pension contribution information can now view their contribution history within the service. This will show you the details of what was submitted and who in your organisation made the submission.

Please remember if you have any issues accessing the service, to try the password reset link from the login screen first, entering the email address associated with your account.

## **2020/21 estimate of pensionable profits form**

The 2020/21 estimate of pensionable profits form is now available on the website <https://www.nhsbsa.nhs.uk/member-hub/information-practitioner-locum-and-non-gp>