

NHS Pensions Updates – March 2020

Sharing our performance

Table 1- Total Transactions

Item	Volume
Total Transactions	12,665
First Retirements	3,217
Revised Retirements	1,324
Estimates	1,623
Re-Employment Cases	1,671
Transfers In	191
Transfers Out	525
5 Year-Rejoiners	37
Pensions on Divorce	30
Life Assurance Lump Sums	175
Partner Pensions	704
Child Allowance	91
Refunds	3,077

Table 2 - First Retirements and Pensioners

Item	Volume
Applications Processed	3,217
On Time	99.19%
Amount paid in Lump Sums	£139,131,713.90
Amount of Pension Paid	£744,614,389.98
No. Pensioners in Payment	973,349

Table 3 - Employer Helpline statistics

Item	Volume
Total Volume Calls	3,570
Average Handling Time (s)	329
Average Speed of Answer (s)	7

Table 4 - Member Helpline statistics

Item	Volume
Total Volume Calls	34,572
Average Handling Time (s)	431
Average Speed of Answer (s)	4

Over the last 12 months we have engaged with employers more than ever before and have worked hard to improve the service you receive. We have:

- Hosted 28 stakeholder engagement events across the country throughout 2019
- Attended 9 national exhibitions
- Attended over 32 regional pension group meetings across the country
- Participants at our events asked over 2,000 questions
- Over 1,000 practice managers attended our GP Practice stakeholder events in 2018

Employer contribution rate arrangements to remain for 2020 / 2021

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%.

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.

To clarify following on from the article in the February 2020 employer newsletter, the specific contribution from university medical schools will remain as advised by the BSA in 2019/20.

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.

More information regarding the arrangement for 2020/21 can be found on our [website](#).

Non-Pensions Online (POL) annual update

All employing authorities are required to submit end of year information to NHS Pensions on an annual basis.

Our Data Management Team will send the prepopulated spreadsheet to the main EA contact week commencing 16 March 2020. This will be partially prepopulated and will include details of all the members where we believe an annual update should be submitted.

Organisations have until 31 May 2020 to submit this information to NHS Pensions. If the information submitted has errors, our data management team will work with employers to improve the accuracy of data before the cut off.

Spreadsheets received after 31 May 2020 will be worked on a best endeavours basis, however we are unable to commit to these being completed prior to the cut off.

Comprehensive guidance notes will be made available to all employers. We are currently considering Webinars / Telephone Conferences for organisations needing assistance. If you are unsure about completing this process in 2020, please contact nhsbsa.stakeholderengagement@nhs.net and we will look at how we can support you.

Further information and updates will be provided in our Employer Newsletter.

Improving your year-end data processing

The accurate and timely updating of NHS Pension records reduces data cleanse effort and ensures up to date information is reflected in Total Reward Statements, Annual Benefit Statements and Annual Allowance Statements. Taking action now to clear data errors and submit missing updates will improve the processing of your 31 March 2020 year-end data.

For employers submitting their year-end through ESR:

Where there is an error on a member record, new information submitted will not process. Errors will accumulate until the original error is cleared. The following actions can prevent the most common data errors:

- Clearing SD55 Annual Update errors will prevent error 0421 – member record not updated for previous year.
- Clearing SS10 Joiner errors will prevent error 0186 or 8030 – no employment or record found to match.
- Clearing SD55 Termination errors will prevent a record showing as non-updated after the legislative deadline date for updating records has passed on 1 June 2020.

Clearing errors before year end processing will improve the success rate on your Heat Map.

For employers submitting their year-end via Pensions Online (POL):

Where there is an error on a member record, you cannot access the record to submit the year end 31 March 2020 annual update:

- Check Employer Allocated Errors and clear any joiner, leaver & terminations errors before 31 March 2020.

For both ESR and POL Employers:

Checking POL notifications; Re-employed Pensioner Rejections will ensure that you are not deducting contributions where an employee is not eligible to contribute to the Scheme or submitting unnecessary year-end data.

When you have cleared your errors – check your ADP4 or Non Updated Years. Submit any missing joiners, annual updates or terminations, as necessary.

NHS Pensions allocated errors

NHS Pensions continue to clear errors allocated to us.

If you have information that will assist us in clearing errors allocated to NHS Pensions in POL Error Handling, you can send this to us through the 'Add Comment' facility then submit. This must only be done if you are providing information to enable us to clear the error.

As these are already allocated to us, we will work on them in business priority order, based on the impact of the error on your members. Therefore, we ask that you do not submit comments asking us to clear the error or advising that you are not able to, as these are of no assistance to us.

Submitting joiner information

We are noticing an increase in joiner errors that have been created due to mismatches in the details submitted and the data held by NHS Pensions from a previous period of employment.

Could we please ask employers that when submitting joiner details, checks are made to ensure that all personal details are accurate and spelled correctly.

Although a difference in the spelling of a name or a single digit in a National Insurance number or date of birth may seem insignificant, this creates data errors and duplicate NHS Pension records. This potentially results in inaccurate information and delays for members.

NHS Jobs is changing

NHS Pensions has been asked to provide the following update from NHS Jobs project team.

The NHS Business Services Authority started providing the NHS Jobs service on 1 April 2018 as part of the NHS Workforce Services directorate.

We're currently redesigning and building an all-new version of the NHS Jobs service which will replace the current NHS Jobs service. The NHS Jobs Project Team are continuing to develop the new service based on user feedback, making regular improvements and releasing new features to groups of users between now and the end of 2020. You can sign up to the NHS Jobs newsletter here to find out more.

NHS Jobs have an Implementation Team in place to ensure the transition is a seamless process for organisations using the new service and are currently in the process of transitioning users of the Central Advertising Service (CAS). This will include GP Practices, Local Authorities and Social Enterprises.

Benefits

Below are some of the features you will benefit from as a result of transitioning to the new service:

- You will be able to add users to your own account, enabling greater flexibility and ownership, avoiding any delays in the recruitment process
- Ability to create and advertise your vacancies as soon as you identify the need to recruit
- In-system shortlisting functionality
- Improved GDPR compliance, as candidates' personal information is only requested when necessary – for example at interview
- Add your organisation's logo to your employer account, along with attachments to vacancies and website links to your webpage

To find out more benefits and additional information on the new service please visit <https://www.nhsbsa.nhs.uk/new-nhs-jobs-service>.

Next Steps

To discuss transitioning to the new NHS Jobs service, contact our dedicated Implementation Team at:

- Email: nhsbsa.nhsjobs@nhs.net
- Telephone: 01924 334224

We are available Monday to Friday between 08:30 and 17:30.

Re-joiners and re-employment update

Last year we issued annual earnings certificate (RE116) forms for re-employed pensioners electronically via email. We will follow the same process this year.

If you have re-employed pensioners working in your organisation, we will endeavour to email you a spreadsheet requesting their 2019/2020 earnings. If we are unable to send you a spreadsheet we will continue to issue paper earnings certificates to you via the post.

Following feedback we received from last year's exercise, we will include the employing authority (EA) code on the spreadsheet this year.

We are also making improvements to the way we process returned spreadsheets. It is important that you complete the details requested in the spreadsheet and return the spreadsheet to us as an email attachment. We will be unable to process information which is not returned on the spreadsheet, including the notification that a pensioner is no longer employed. Therefore, it is important that you return each spreadsheet that we send to you.

Earnings certificates will be issued between 1 April 2020 and 10 April 2020 and full instructions on how to complete and return the spreadsheet will be issued in the covering email. Please could you complete and return the spreadsheet in the same time frame as the paper annual earnings certificates previously issued.

Email accounts and re-employment form

Junk Mail

Please check your outlook settings to ensure you can receive correspondence from NHS Pensions, as some correspondence maybe stopped by your Firewall or go into your junk (spam) folder.

Add @nhs.net e-mail addresses to your saved sender list.

Awards e-mail account

If you are contacting the awards team regarding a pending award or are supplying details to enable the team to process the retirement benefits, please can you ensure that you send this information to the polia3 account: nhsbsa.polia3@nhs.net

Use of email accounts – Stakeholder Engagement Email Account

Can all employers ensure that they are using the correct email address when sending queries to NHS Pensions via the stakeholder engagement email account.

Please note that this email account should only be used for:

- Meetings and Forums
- Educational needs
- Escalation issues
- Website and ask us information

For specific queries please send your email to the below.

- For data issues – nhsbsa.datamanagement@nhs.net
- For Pensions Online – nhsbsa.polhd@nhs.net
- Any other employer queries should be sent to nhsbsa.pensionemployers@nhs.net

RE08 (re-employment form)

When completing the information regarding member's re-employment please ensure you are using the form that is relevant to that person. We have received a number of forms that have included the same membership number, when an employer has reused the form that has been received on their notice board for a specific member, as the membership number is printed on the bottom of each electronic form. This can result in the re-employment details being incorrect.

If you have not received a form regarding the re-employment of a member, please download a copy from our website for the pensioner to complete. Please find the latest version on the [Pensioner Hub](#).

Stakeholder engagement update

The last 12 months have been an exciting time for the Stakeholder Engagement Team, appointing a further 5 Stakeholder Engagement Managers to build on the support we offer employers nationwide.

We have also seen a steady increase in both the volume and complexity of both the Employer and Stakeholder Engagement email accounts and continue to invest in resource for this key area of support for employers.

The Stakeholder Engagement Team is split into the below three categories.

Engagement

- Coordinating events and ensuring they are available to all employers nationally covering the most important elements of pension administration
- Responsible for customer insight, understanding the requirements of different employer types and how we can best support them based on feedback
- Looking at how we proactively communicate with all our Stakeholders ensuring they have up to date information available to them when administering the NHS Pension Scheme

Education

- Preparing resources and educational material pitched at different levels of complexity to support all employers in administering the NHS Pension Scheme
- Attend regional and national forums providing important relevant updates on NHS Pensions and delivering bespoke training where requested
- Supporting our NHS Pensions events, presenting topics based on requirements gathered from feedback

Escalation

- Improving customer service by having a route of escalation for our service delivery team, where they are unable to gather required information or where we feel inaccurate information has been received
- The proactive recovery of outstanding pensions contributions from employers that are not adhering to the regulations for making payments in line with our payment schedule

We gather feedback in a multitude of ways and review this information to improve and support you further. We encourage all employers to provide feedback when requested.

Stakeholder Engagement upcoming events

The stakeholder engagement team run a series of events throughout the year providing regular updates and delivering educational training. Please see our [Pension Events Calendar](#) for upcoming events.

If your organisation would like to request training/attendance directly from the stakeholder engagement team, please complete the [event / meeting request form \(Word: 241KB\)](#) and email the team for consideration: nhsbsa.stakeholderengagement@nhs.net

Next round of Stakeholder GP events

We are pleased to announce that the Level 1 and Level 2 Stakeholder GP Events will be also taking place in Birmingham, Leeds and London.

Birmingham

NHS Pension GP Practice Stakeholder Event - Level 1

Tuesday 28 April from 9:30am to 3:30pm
De Vere Colmore Gate, Birmingham B3 2QD
Link to Eventbrite: [Level 1](#)

NHS Pension GP Practice Stakeholder Event - Level 2

Tuesday 12 May from 9:30am to 3:30pm
Jurys Inn Birmingham, B1 2HQ
Link to Eventbrite: [Level 2](#)

Leeds

NHS Pension GP Practice Stakeholder Event - Level 1

Wednesday 22nd April 09.30 - 15.30

The Met Hotel, Leeds LS1 2HQ

Link to Eventbrite: [Level 1](#)

NHS Pension GP Practice Stakeholder Event - Level 2

Tuesday 9th June 09.30 - 15.30

Park Plaza Hotel, Leeds LS1 5NS

Link to Eventbrite: [Level 2](#)

London

NHS Pension GP Practice Stakeholder Event - Level 1

Thursday 21st May 09.30-15.30

Mary Ward House, London WC1H 9SN

Link to Eventbrite: [Level 1](#)

NHS Pension GP Practice Stakeholder Event - Level 2

Thursday 25th June 09.30-15.30

Mary Ward House, London WC1H 9SN

Link to Eventbrite: [Level 2](#)

GMS, PMS and APMS Contractors – 2020 / 21 estimate of pensionable income form

GP surgeries and APMS contractors are reminded that they should have already submitted their estimate of pensionable income form to NHS England/PCSE or the Local Health Board in Wales. If they have not they should do so immediately otherwise the GPs (excluding GP locums) and non-GP Providers will be subject to the maximum employee tiered contribution rate regardless their income.

The form is located in the Practitioner webpage within the Member Hub section of our website.

There is also a GP Pension Guide located in the Practitioner webpage which includes information regarding the various GP pension forms.

Ask Us? is changing

Ask Us? Will be changing to a knowledge-based system and will be called NHSBSA Knowledge Base, more information will be published in the April Employer Update.