

## NHS Pensions Update – April 2021

Welcome to the April 2021 NHS Pensions Employer Update.

If you have any queries about the easements we have introduced to help support employers at this time, please visit our [coronavirus \(COVID-19\) contingency planning page](#) on the Employer Hub where we have included lots of useful information and links to other relevant areas of the website.

### Sharing our performance

*Table 1- Total Transactions (March 2021)*

| Item                     | Volume |
|--------------------------|--------|
| Total Transactions       | 12,763 |
| First Retirements        | 4,276  |
| Revised Retirements      | 906    |
| Estimates                | 2,039  |
| Re-Employment Cases      | 999    |
| Transfers In             | 246    |
| Transfers Out            | 152    |
| 5 Year-Rejoiners         | 51     |
| Pensions on Divorce      | 416    |
| Life Assurance Lump Sums | 357    |
| Partner Pensions         | 815    |
| Child Allowance          | 134    |
| Refunds                  | 2,372  |

*Table 2 - First Retirements and Pensioners (March 2021)*

| Item                      | Volume          |
|---------------------------|-----------------|
| Applications Processed    | 4,276           |
| On Time                   | 99.23%          |
| Amount paid in Lump Sums  | £306,741,014.50 |
| Amount of Pension Paid    | £781,479,993.58 |
| No. Pensioners in Payment | 1,014,022       |

*Table 3 - Employer Helpline statistics (March 2021)*

| <b>Item</b>                 | <b>Volume</b> |
|-----------------------------|---------------|
| Total Volume Calls          | 3,127         |
| Average Handling Time (s)   | 411           |
| Average Speed of Answer (s) | 113           |

*Table 4 - Member Helpline statistics (March 2021)*

| <b>Item</b>                 | <b>Volume</b> |
|-----------------------------|---------------|
| Total Volume Calls          | 33,749        |
| Average Handling Time (s)   | 508           |
| Average Speed of Answer (s) | 112           |

## **Independent provider (IP) End of Year Certificate 2020/21**

The 2020/21 End of Year Certificate is now available on our website and can be found on our [NHS Pensions Finance](#) webpage.

As part of your IP status, you are legally required to complete end of year certificates for each employer code you have declaring scheme members, contributions and contact details. IP employers must download and complete the certificate and return along with the staff list to [nhsbsa.pensionsfinancereporting@nhs.net](mailto:nhsbsa.pensionsfinancereporting@nhs.net) by 31 May 2021.

Please note that it is important, and also a legal requirement, that all member records are updated by 31 May 2021. Without this, we will be unable to verify and sign off your returned certificate as we would be unable to perform all required reconciliations and controls.

If your organisation contributed to the scheme in 2019/20 and you are still to complete this statement, these are also available on the website.

If you have any concerns about not being able to complete this activity as a result of COVID-19 outbreak, please contact our team on [nhsbsa.pensionemployers@nhsbsa.nhs.uk](mailto:nhsbsa.pensionemployers@nhsbsa.nhs.uk).

## **New Fair Deal (NFD) End of Year Certificate 2020/21**

The 2020/21 End of Year Certificate is now available on our website and can be accessed via our [NHS Pensions Finance](#) webpage.

As part of your New Fair Deal (NFD) status, you are legally required to complete end of year certificates for each employer code you have declaring scheme members, contributions and contact details. NFD employers must download and complete the certificate and return to [nhsbsa.pensionsfinancereporting@nhs.net](mailto:nhsbsa.pensionsfinancereporting@nhs.net) by 31 May 2021.

Please note that it is important, and also a legal requirement, that all member records are updated by 31 May 2021.

If your organisation contributed to the scheme in 2019/20 and you are still to complete this statement, these are also available on the website.

If you have any concerns about not being able to complete this activity as a result of COVID-19 outbreak, please contact our team on [nhsbsa.pensionsemployers@nhsbsa.nhs.uk](mailto:nhsbsa.pensionsemployers@nhsbsa.nhs.uk).

## **Upcoming GP practice manager events – Level 1**

The NHS Pensions Stakeholder Engagement Team is running a series of GP practice manager events throughout May and June 2021 delivering educational training tailored for practice managers. These events will be delivered virtually via Microsoft Teams.

Practice managers will need to attend two consecutive training sessions. The second session needs to immediately follow the first. For example if you select to attend Monday 10 May Level 1 Part 1, you must also select Tuesday 11 May Level 1 Part 2. Only after the two consecutive sessions have been attended will you receive a Continued Professional Development (CPD) accreditation.

There are 2 training sessions:

- GP Practice Manager Event Level 1 Part 1
- GP Practice Manager Event Level 1 Part 2

Level 1 Stakeholder GP Practice Manager Events will take place on the following dates:

### **GP Practice Manager Event Level 1, Part 1**

Monday 10 May 10:00 - 12:00

This session includes: NHS Pension Scheme website, Annual Benefit Statements and roles and responsibilities.

[Link to Eventbrite: Level 1, Part 1](#)

### **GP Practice Manager Event Level 1, Part 2**

Tuesday 11 May 10:00 - 12:00

This session includes: POL, AW8 and the member journey.

[Link to Eventbrite: Level 1, Part 2](#)

### **GP Practice Manager Event Level 1, Part 1**

Wednesday 12 May 10:00 - 12:00

This session includes: NHS Pension Scheme website, Annual Benefit Statements and roles and responsibilities.

[Link to Eventbrite: Level 1, Part 1](#)

### **GP Practice Manager Event Level 1 Part 2**

Thursday 13 May 10:00 - 12:00

This session includes: POL, AW8 and the member journey.

[Link to Eventbrite: Level 1, Part 2](#)

### **GP Practice Manager Event Level 1, Part 1**

Monday 17 May 13:00 - 15:00

This session includes: NHS Pension Scheme website, Annual Benefit Statements and roles and responsibilities.

[Link to Eventbrite: Level 1, Part 1](#)

### **GP Practice Manager Event Level 1, Part 2**

Tuesday 18 May 13:00 - 15:00

This session includes: POL, AW8 and the member journey.

[Link to Eventbrite: Level 1, Part 2](#)

### **GP Practice Manager Event Level 1, Part 1**

Wednesday 19 May 13:00 - 15:00

This session includes: NHS Pension Scheme website, Annual Benefit Statements and roles and responsibilities.

[Link to Eventbrite: Level 1, Part 1](#)

### **GP Practice Manager Event Level 1 Part 2**

Thursday 20 May 13:00 - 15:00

This session includes: POL, AW8 and the member journey.

[Link to Eventbrite: Level 1, Part 2](#)

## **GP Practice Manager Event Level 1, Part 1**

Monday 24 May 10:00 - 12:00

This session includes: NHS Pension Scheme website, Annual Benefit Statements and roles and responsibilities.

[Link to Eventbrite: Level 1, Part 1](#)

## **GP Practice Manager Event Level 1, Part 2**

Tuesday 25 May 10:00 - 12:00

This session includes: POL, AW8 and the member journey.

[Link to Eventbrite: Level 1, Part 2](#)

## **GP Practice Manager Event Level 1, Part 1**

Wednesday 26 May 10:00 - 12:00

This session includes: NHS Pension Scheme website, Annual Benefit Statements and roles and responsibilities.

[Link to Eventbrite: Level 1, Part 1](#)

## **GP Practice Manager Event Level 1 Part 2**

Thursday 27 May 10:00 - 12:00

This session includes: POL, AW8 and the member journey.

[Link to Eventbrite: Level 1, Part 2](#)

**If you register and then are unable to attend, please let us know as soon as possible so that we can reallocate your ticket. We will charge you for non-attendance if you do not let us know at least 24 hours before the event.**

The Level 2 NHS Pensions GP Practice Events will be published in next month's Employer Update to register via Eventbrite.

If your organisation would like to request training/attendance directly from the Stakeholder Engagement Team, please complete the event / meeting request form available on our [Stakeholder Engagement Team webpage](#) and email the team for consideration: [nhsbsa.stakeholderengagement@nhs.net](mailto:nhsbsa.stakeholderengagement@nhs.net)

## **Non-POL annual update training webinar**

Thanks to everyone who joined us for our non-POL annual update Zoom webinar for non-POL and non-ESR employers last week. We hope you found the session useful.

We have created a [Slido survey](#) for those who were able to attend and we would really appreciate your feedback to help shape future training events.

If you were unable to attend the webinar, you can watch the [video guidance for completing your annual update spreadsheet here](#). You can also view a [transcript of the Q&A's](#) from the webinar here.

We will soon be making a recording of the Zoom webinar available as a resource on the NHS Pensions website in the [Employer Hub section](#).

## **Reminder: Non-Pensions Online (POL) annual update**

All employing authorities (EAs) are required to submit end of year information to NHS Pensions on an annual basis. Our Data Management Team sent the prepopulated spreadsheet to the main EA contact in March.

This will be partially prepopulated and will include details for all members where we believe an annual update should be submitted. Organisations have until **31 May 2021** to submit this information to NHS Pensions.

Click [here](#) for more information on non-POL updates.

## **The NHS and Social Care Coronavirus Life Assurance Scheme 2020**

Information on the government's life assurance scheme for eligible frontline health and social care workers during the coronavirus (COVID-19) pandemic can be found on the NHSBSA website via [www.nhsbsa.nhs.uk/coronavirus-life-assurance-2020](http://www.nhsbsa.nhs.uk/coronavirus-life-assurance-2020)

Take a look today and make sure you understand your responsibilities as an employer in helping to communicate the scheme to staff, support bereaved families to make a claim and oversee their claims process.

## **NHS Wales 2019/20 Pensions Annual Allowance Charge Compensation Policy**

In December 2019, the Welsh Government announced that clinical staff who go over their annual allowance for the 2019/20 tax year and who use scheme pays to pay the tax charge can be compensated in retirement for any reduction to their NHS Pension Scheme benefits.

The announcement gave assurance to clinicians that they could undertake any combination of clinical roles for the NHS during the 2019/20 tax year, including additional work relating to the coronavirus response, without suffering any financial loss as a result of the annual allowance taper.

Clinicians in Wales who have received a pension savings statement for the 2019/20 tax year or think they may have an annual allowance charge in respect of their NHS Pension Scheme benefits, can find more information about the 2019/20 Pension Annual Allowance Charge Compensation Policy, whether they're eligible and how to apply at [www.nhsconfed.org/NHSPensionsWales](http://www.nhsconfed.org/NHSPensionsWales)

To apply, clinicians will need to complete an application form and ask their employing authority to complete the part of the form confirming their clinical eligibility for the scheme.

You can find resources for employers, a downloadable copy of the application form and details of how to confirm eligibility at [www.nhsconfed.org/NHSPensionsWales](http://www.nhsconfed.org/NHSPensionsWales)

We'll be sharing these details with members on our website and social media next week.

## **Reminder – submission of bereavements forms**

A reminder from the Bereavements team that employers should not email any forms to the team. Please send any of the forms listed below, including Tell Us Once and Death Certificates, directly to [nhsbsa.pensionscanquery@nhs.net](mailto:nhsbsa.pensionscanquery@nhs.net) where the forms will be correctly routed to the Bereavements team for action.

Should the Bereavements team need any additional information or clarification from employers, they will contact the employer directly.

### **Bereavement Forms:**

AW9, AW9P, AW11, AW158, AW11PC, D10, D12, D13, D15, DE##, DR3, DCF, G60, LSOD1, Death Certificates and Tell Us Once.

## **POL queries are changing**

From the 4 May your POL queries will go directly to the Customer Contact Centre, who will respond directly to your telephone queries.

## **New employer email account processes**

Following the change of the employers email account to [nhsbsa.pensionemployers@nhsbsa.nhs.uk](mailto:nhsbsa.pensionemployers@nhsbsa.nhs.uk) on the 1 April 2021 the following information will need to be included in member specific queries to ensure that employer queries are responded to in full.

- EA Code of your organisation
- The member's SD number / NI Number
- The member's full name

If you're an IFA or union contacting the employers account you need to ensure that the head office postcode is included in the email and on the LOA.

## **NHS Pension Scheme – submission of employer forms**

To ensure there are no delays with processing of forms we have agreed to accept certain forms in a PDF/Word format via e-mail to our pension scanning at [nhsbsa.pensionscanquery@nhs.net](mailto:nhsbsa.pensionscanquery@nhs.net) The scanning team save the form(s) to the members record and arrange for the correct service team workflow to be launched.

### **Exceptions:**

For forms which do not routinely form part of our NHS Pension Scheme administration such as:

- 19/20 compensation policy application form
- Coronavirus lump sum application form

We must receive a fully completed hardcopy (paper copy) signed and stamped.

## **Reminder: Update on the government changes to public service pension schemes – the McCloud judgment**

In 2015 the government made changes to reform the majority of public service pension schemes. These reforms did not apply to those members closest to retirement, who remained in their legacy schemes with 'transitional protection'. The Court of Appeal later found this to be discriminatory against younger members.

The government has been working to fix this and has recently published the outcome of its consultation on how it will address the age discrimination. You can read more about the consultation response and changes on our website.

We have also shared a [news article for members](#) and [FAQs](#) that you may wish to share. We will be sharing more information once this is available.