

## NHS Pensions Update – May 2021

Welcome to the May 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 (April 2021)*

Item	Volume
Total Transactions	12,838
First Retirements	5,472
Revised Retirements	422
Estimates	1,417
Re-Employment Cases	994
Transfers In	366
Transfers Out	155
5 Year-Rejoiners	45
Pensions on Divorce	537
Life Assurance Lump Sums	473
Partner Pensions	732
Child Allowance	109
Refunds	2,116

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

Item	Volume
Applications Processed	5,472
On Time	99.76%
Amount paid in Lump Sums	£204,805,536.57
Amount of Pension Paid	£822,267,320.05
No. Pensioners in Payment	1,016,020

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

<b>Item</b>	<b>Volume</b>
Total Volume Calls	2,727
Average Handling Time (s)	422
Average Speed of Answer (s)	138

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

<b>Item</b>	<b>Volume</b>
Total Volume Calls	28,718
Average Handling Time (s)	512
Average Speed of Answer (s)	128

## **2021/22 GP SOLO form**

The GP SOLO form for year 2021/22 and guidance notes are now available on the [information for practitioners and non-GP providers webpage](#) of our Member Hub.

The GP SOLO form may be completed annually or every month. Where an annual SOLO form is preferred, NHS Pension Scheme contributions must still be paid every month. Further guidance regarding this process in England can be located on Primary Care Support England's (PCSE) website.

## **2021/22 GP locum forms A and B**

GP locum forms A and B for year 2021/22 are now available on the [information for practitioners and non-GP providers webpage](#) of our Member Hub.

The '10-week rule' for declaring pensionable locum work has been suspended for 2021/22 to give GP locums more time to complete their forms during the current Coronavirus (COVID-19) pandemic.

There is no need for the commissioning practice to enter the 'practice stamp' at Part 2 of Form A so long as the name of the practice is entered and the form is signed and dated. A digital/electronic signature is acceptable.

GP locum chambers may use their own email account to submit the forms if they do not have an 'nhs.net' email account.

On form B the GP must now enter their GMC registration number in the allocated box. They must also enter their cumulative locum pensionable earnings (in box j) to assist with identifying their correct tiered employee contribution rate.

## Changes to the AW171 process

Further to previous updates, we have now implemented the final phase of the system functionality to automate the AW171 process. This functionality will automatically trigger a revised award work item where the change received indicates that this is likely to affect a member's benefits.

This means that everyone who may be due a re-assessment of benefits will receive a re-assessment and their benefits will be adjusted in a timelier manner.

Now there is an automatic trigger, there is no longer a need for you to submit an AW171 form to us to notify us of a change as we will have already been alerted from changes submitted via POL, ESR (via an SD55E) or from amendments received via email from non-POL employers.

For revisions where the change is not reflected electronically, such as lump sum amendments or a change to the reason for retirement, you should email these to [nhsbsa.pensionemployers@nhsbsa.nhs.uk](mailto:nhsbsa.pensionemployers@nhsbsa.nhs.uk) and the request for change will be raised by a member of our team on your behalf. Additionally, if you have a query relating to the revised award then please use this same email address.

The system will now calculate pay for all members of the 1995 and 2008 Scheme and the 2015 Scheme and we have added tolerance checks to ensure benefits are paid correctly. If the pay falls outside of the tolerance, a member of the Revised Awards team will be in contact to check the details we hold on record/request pay if necessary.

You no longer need to send us AW171s. We'll arrange for the AW171 form to be removed from the website as soon as is practicable and no later than the end of May.

## Extension of 2019/20 voluntary scheme pays deadline – information for employers

To help support NHS Pension Scheme members who are continuing to deal with the impact of the Coronavirus (COVID-19) pandemic, we have taken the decision to extend the 2019/20 voluntary scheme pays deadline.

Members who have an annual allowance charge for 2019/20 and wish to use voluntary scheme pays to pay all or part of this charge, now have until 31 March 2022 to submit their scheme pays election.

The extended voluntary scheme pays deadline of the 31 March 2022 coincides with the same deadline for clinicians applying to the 19/20 Pension Annual Allowance Charge Compensation Scheme.

Please be aware that we do not have the authority to extend the mandatory scheme pays election deadline of 31 July 2021 for 2019/20 as this is confirmed in legislation.

More information about mandatory and voluntary scheme pays, how members can apply for scheme pays and the deadlines for doing so can be found on our [annual allowance webpage](#).

This announcement follows our decision last year to also extend the voluntary scheme pays deadline for 2018/19.

## **Level 2 GP Events**

Our NHSBSA Pensions Level 2 GP Events – Administration events for Local Administration of the NHS Pension Scheme will be starting in September.

We'll be publishing the registration details via Eventbrite in the Employer Update in the next couple of months.

These events will be delivered virtually via Microsoft Teams and will include the following sessions:

### Session 1:

- Flexible retirement
- Early retirement
- Drawdown where a member takes part of their pension early, including how to administer and the processes involved
- Retire and return

### Session 2:

- Ill health
- Ill health and family benefits
- Serious ill health including commutation, where a member that has less than 12 months to live may receive all their ill health pension in one lump sum payment
- Death in membership

### Session 3:

- Roles and responsibilities
- Detailed explanation of Primary Care Support England (PCSE) and GP pensions.
- Completion of estimate of pensions income / pay / profits form
- Non-compliance and The Pension Regulator

### Session 4:

- Pensions Online (POL)
- POL Memberzone

## **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.

### **Ill health retirement applications**

There has been an increased number of applications for ill health retirement with missing information which could delay a member's application.

Further medical evidence is being requested due to lack of information provided on and accompanying the application form. When submitting an ill health retirement application form please make sure all relevant medical reports are enclosed, including occupational health reports and any reports from the member's specialist(s).

Ensure the correct version of the ill health retirement application form is used and sent to NHS Pensions. Part C of the AW33E application form should be completed by an occupational health doctor. Only where this is not possible should the member's GP or specialist complete the form, ensuring the correct version of the form is completed is prudent to all members and especially those with a terminal diagnosis.

You can find the following application forms on the employer forms page of the Employer Hub under 'Retirement Forms':

- Consideration of entitlement to ill health retirement benefits (AW33E) - version 18
- Consideration of entitlement to ill health retirement benefits AW33E Part C - version 13

The AW240 can be found in the 'How to apply – ill health pension application forms' of the [applying for your pension webpage](#) on our Member Hub:

- Consideration of entitlement for early payment of deferred benefits due to ill health (AW240) - version 12
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### **Independent provider (IP) End of Year Certificate 2020/21**

A reminder that 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**

A reminder that 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.pensionemployers@nhsbsa.nhs.uk](mailto:nhsbsa.pensionemployers@nhsbsa.nhs.uk).

## **ePOL service**

For business continuity and to ensure greater stability we have moved the ePOL service to a new data centre.

You should not experience any problems in accessing the system as we have not made any changes to the URL, it remains [https://www.pensionsagency.nhs.uk/poltest\\_forms/home3.cfm](https://www.pensionsagency.nhs.uk/poltest_forms/home3.cfm)

The IP address has changed, and some IT suppliers restrict access to IP addresses. The new IP address is 194.155.10.128. If you have any problems accessing the site can you please contact your own IT department or network supplier and check they have access to 194.155.10.128 via TCP 80 and 443 on the HSCN/N3 network.

If you're a 3rd party that has been authorised to use ePOL or a new 3rd party that was previously authorised/sponsored by the NHBSA to access the IP Address, you will need to be aware of the new IP address.

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

Both NHS England and NHS Improvement (NHSEI) and NHS Wales have published guidance on their respective 2019/20 Pension Annual Allowance Charge Compensation policies, including an application form for eligible clinicians to apply for the scheme and information on the actions that employers now need to take.

It follows the NHSEI and NHS Wales announcements at the end of 2019 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.

You can find resources for employers, downloadable application forms and details of how to confirm eligibility on the NHSEI website if you're based in England, or the NHS Confed website if you're based in Wales:

- PAACCS information for England: [www.england.nhs.uk/pensions/](http://www.england.nhs.uk/pensions/)
- PACCS information for Wales: [www.nhsconfed.org/NHSPensionsWales](http://www.nhsconfed.org/NHSPensionsWales)

## **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.