

## NHS Pensions Update – April 2022

Welcome to the April 2022 NHS Pensions Employer Update.

### Sharing our performance

*Table 1- Total Transactions (March 2022)*

Item	Volume
Total Transactions	99,562
First retirements	8,701
Estimates	4,205
Annual allowance	5,182
Ill health applications	726
AP/ERRBO/AVC	981
Bereavements	8,127
Transfers	3,385
Nominations	2,873
Pensions On Divorce	1,869
Protection of Pay	124
Refunds	1,869
Revised retirements	4,430
Service	3,370
Inbound processing	6,113
Data support	28,108
Pensioner admin	19,499

*Table 2 - First Retirements and Pensioners (March 2022)*

Item	Volume
Applications Processed	8,701
On Time	99.88%
Amount paid in Lump Sums	£407,583,680.38
Amount of Pension Paid	£819,862,461.70
No. Pensioners in Payment	1,053,086

*Table 3 - Employer Helpline statistics (March 2022)*

Item	Volume
Total Volume Calls	3,650
Average Handling Time (s)	533
Average Speed of Answer (s)	95

*Table 4 - Member Helpline statistics (March 2022)*

<b>Item</b>	<b>Volume</b>
Total Volume Calls	28,201
Average Handling Time (s)	650
Average Speed of Answer (s)	606

From May 2021 we have amended the way in which we report transactional values to include all events across the Scheme and all transactions completed for each function, up to and including the actual event itself. This change has been made to provide a more comprehensive overview of transactional volumes on a month-by-month basis.

## **Closure of 1995/2008 Scheme and transition of members to 2015 Scheme**

As part of the changes to public pension schemes, both the 1995 and 2008 Sections of the 1995/2008 Scheme closed on 31 March 2022.

All active members of the 1995/2008 Scheme were automatically moved to the 2015 Scheme on 1 April 2022.

### **We wrote to all affected active members in January**

Letters were sent to all active members of the 1995/2008 Scheme who had full protection and who were due to move to the 2015 Scheme on 1 April 2022.

More information on the changes can be found on our [‘Your pension after 1 April 2022’ webpage](#).

You can find copies of the letters and more information and resources for employers on the [employer webpage of our changes to public service pensions web hub](#).

### **Deferred members wishing to re-join the Scheme**

All deferred members who wish to re-join the Scheme will join the 2015 Scheme.

Members won't lose any of the pension benefits they've already built up in 1995/2008 Scheme. They'll make up part of their benefits when they retire, and the rest will be made up of any they earn in the 2015 Scheme from 1 April onwards.

We've updated our [‘Joining the Scheme’](#) and [‘Membership of the Scheme’](#) webpages to signpost deferred members to these changes. Deferred members wishing to re-join may also find our new [‘Understanding your benefits in the 2015 Scheme’](#) webpage useful.

## Special Class and Mental Health Officer status

We've updated our guidance for each status and there are [factsheets available for employers and members via our website](#).

There are eligibility criteria for the employment groups that can automatically qualify and for circumstances where an application might be considered for certain types of managerial roles.

Applications for either status in a managerial role must be made by the employer and referred to us using the SMR application form, [available via our website](#). To assist in decision making, the SMR form has also been updated and requires that employers provide certain information about an applicant's managerial role, which must be supported by documentary evidence.

Where either status is relevant, it is essential that employers record the correct capacity code for our records when appointing new employees, or if their job changes. The factsheets include information about the codes that should be used but please contact us if you are unsure of the correct capacity code for an employee.

## Transitioned 1995 Section Special Class /Mental Health Officer members and GS184 Notifications

We have implemented a system change to capture Special Class / Mental Health Officer (MHO) information previously held by a 1995 Section member, within the 2015 Scheme membership.

Please note that you may start receiving GS184 notifications for Special Class and MHO membership within the 2015 Scheme because of this change, which you must action as you would normally.

To avoid any doubt, we are confirming that the capturing of Special Class and MHO information within the 2015 Scheme is only for information purposes and will not count towards any benefits within the 2015 Scheme. It will however be used when assessing the Special Class / MHO member's eligibility for unreduced 1995 Scheme benefits.

## Independent Provider (IP) End of Year Certificate 2021-22

You can now access the 2021-22 End of Year Certificate via our [website](#).

As part of your Independent Provider 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 2022**.

Please note that it is important, and a legal requirement, that all member records are updated by **31 May 2022**. 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 or 2020/21 and you are still to complete these statements, they are available on the website.

### **New Fair Deal (NFD) End of Year Certificate 2021-22**

You can now access the 2021-22 End of Year Certificate via our [website](#).

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 **31st May 2022**.

Please note that it is important, and a legal requirement, that all member records are updated by **31 May 2022**.

If your organisation contributed to the scheme in 2019/20 or 2020/21 and you are still to complete these statements, they are available on the website.

### **New GP forms for 2022/23**

New GP Locum Form A, Form B, and Solo forms are available via our Practitioner and non-GP provider webpage on the Member Hub.

The forms should be used to record work undertaken between 1 April and 30 September 2022.

Due to the change to member contributions that will be introduced on 1 October 2022, new forms will be made available before this date for work undertaken between 1 October 2022 and 31 March 2023.

### **Reminder – employer actions for annual update**

All employing authorities (EAs) are required to submit end of year information to NHS Pensions on an annual basis to enable us to update member records.

You must submit this information to NHS Pensions by 31 May.

If you use Pensions Online (POL) you should submit this year end information via POL. If you are a non-POL employer, the Data Management Team sent a prepopulated spreadsheet to the main EA contact week commencing 14 March 2022. The spreadsheet will be partially prepopulated for all members where an annual update should be submitted.

Once the spreadsheet has been received, employers will receive an email from the data team to confirm receipt, this will be sent within five working days. If you do not receive the

confirmation email you should contact the employer helpline 0300 3301 353. The data team will then contact you directly to resolve this issue.

Any spreadsheets received after 31 May 2022 will be worked on a best endeavours basis. The data team are unable to commit to these being completed prior to the annual update cut off.

## Contact details

We want to ensure that we have the most up to date contact for all employers. To support this, we ask that the main Pensions Online Administrator for each employer checks the contact details we hold are correct.

To do this, access Pensions Online (POL) and select 'Administer Employer Access'. This link allows the main Pensions Online Administrator to add, amend, edit or delete contact information for all pensions managers and administrators within their organisation, including those who do not require access to Pensions Online.

Alternatively, the main Pensions Online Administrator can email any change of contact details to [nhsbsa.contactdetails@nhs.net](mailto:nhsbsa.contactdetails@nhs.net)

## Pensions Online (POL) downtime

POL will be available throughout April, May, and June 2022 7am- 7pm apart from the periods noted below due to scheduled system maintenance:

- Saturday 30 April – Sunday 1 May
- Saturday 28 May – Sunday 29 May
- Friday 10 June - Saturday 11 June
- Saturday 25 June – Sunday 26 June

If we do need to bring POL down at short notice for urgent maintenance, we will advise you as soon as we can in advance via the POL homepage.

## Member contact information

We have noticed an increase of members contacting us directly using the incorrect routes of contact. When providing NHS Pensions contact information to members, please provide them with dedicated member contact information:

- Member helpline: 0300 3301 346
- Dedicated member email address: [nhsbsa.pensionsmember@nhsbsa.nhs.uk](mailto:nhsbsa.pensionsmember@nhsbsa.nhs.uk)

Please also ask members to include their Member (SD) number or NI number when emailing or have it close by when calling. This will enable us to provide a better service to our members.

We have recently updated our member helpline to include a recorded message that asks the caller to enter their 8-digit Member (SD) number. If a member isn't able to enter their member number, they will be asked to enter their date of birth. These changes will support call handlers to locate the member record more quickly.

## **NHS Pensions Member Events for 2022**

Throughout this year, a number of events are available for members of the NHS Pension Scheme to provide more clarity on what the Scheme is and what you are entitled to. The events are as follows:

### **Understanding the NHS Pension Scheme and its benefits**

These events help you to find out how the Scheme works, who's eligible to join and the benefits that you are entitled to.

#### **May dates:**

- Tuesday 24 May, 10am: <https://www.eventbrite.co.uk/e/299489991627>
- Wednesday 25 May, 10am: <https://www.eventbrite.co.uk/e/321139114737>

### **Your Total Reward Statement and Annual Benefit Statement explained**

Your Annual Benefit Statement (ABS)/ Total Reward Statement (TRS) provides personalised information about the value of your employment package and includes details about your pension benefits.

This session will provide more information about your Annual Benefit Statement or Total Reward Statement, including what it is, how to access it and how to understand your statement.

#### **May dates:**

- Tuesday 24 May, 1pm: <https://www.eventbrite.co.uk/e/321138522967>
- Wednesday 25 May, 1pm: <https://www.eventbrite.co.uk/e/303316155787>

### **Your retirement options explained**

Whether you are approaching retirement or just starting out in your career within the NHS, planning for your future has never been more important. These sessions aim to provide you with more information on your retirement options, including eligibility for taking a lump sum, as well as much more.

#### **May dates:**

- Tuesday 24 May, 3pm: <https://www.eventbrite.co.uk/e/303321592047>
- Wednesday 25 May, 3pm: <https://www.eventbrite.co.uk/e/303323417507>

These events are organised by the Stakeholder Engagement Team and all staff are encouraged to attend the online events to fully understand the Scheme.

You can also ask any questions you may have, although the team won't be able to answer any queries relating to your specific personal circumstances. There is also an opportunity at the end of the sessions to give feedback on the event.

When available, you can register your place through Eventbrite, however please note you may have some issues opening this if you are using Internet Explorer, so please try a different browser to register your place or get in touch with the Stakeholder Engagement Team.

If you require additional support with any of the events or would like to find out more, please email the Stakeholder Engagement Team at [nhsbsa.memberinbox@nhs.net](mailto:nhsbsa.memberinbox@nhs.net)

If you are unable to make the event you have registered for and need to cancel your place on any of the dates, please cancel any tickets on Eventbrite so that people on the waiting list can use the spaces. You can also keep up to date on the Employer Hub and Member Hub for any new event dates.

## **ESR Pensions Event**

You are invited to attend a virtual ESR Pensions event hosted jointly with NHS Pensions on 24 May 2022.

The event will run from 10am to 12pm, with an hour's lunchbreak followed by the afternoon session from 1pm to 3pm.

Throughout the day we will be covering a number of topics including:

- ESR processing
- ESR Interface
- NHS Pensions Reports
- errors and how to action
- step by step data processing

There will be opportunities throughout the day for question-and-answer sessions with both the NHS Pensions and ESR teams. You can book your place on [Eventbrite](#).

The link to the Microsoft Teams event will be emailed out the day before the event to everyone who has booked via Eventbrite.

If you have any questions about this event, please email:  
[nhsbsa.pensionsevents@nhs.net](mailto:nhsbsa.pensionsevents@nhs.net)

## **Reminder - Administration Foundation Course**

This is a reminder for anyone interested in the Administration Foundation Course which is available over two dates in April.

## Dates:

- Wednesday 27 April 2022 between 1pm and 3pm – visit the [Eventbrite link](#) to book a place
- The course will be repeated on Thursday 28 April between 1pm-3pm – visit the [Eventbrite link](#) to book a place

The foundation course has been developed following feedback from our GP practice manager employer training events.

This course is available to all new local administrators of the NHS Pension Scheme with less than 12 months in post. It provides a high-level overview of what is expected of you as an NHS Pension administrator throughout a scheme year.

At the end of the course, you will have a high-level understanding of the actions required to enable you to administer the NHS Pension Scheme at a local level. The course could also be used as a high-level refresher course for anyone restarting in local NHS Pension Scheme administration.

The foundation course is available to all employer types of the NHS Pension Scheme.

## Additional May 2022 level 1 GP practice manager training dates

We've announced an additional Level 1 GP practice manager training event in May 2022 presenting educational training tailored for practice managers.

The event will be delivered virtually via Microsoft Teams and is in two parts. The second session needs to immediately follow the first. If you select to attend Tuesday 17 May Level 1 Part 1, you must also select Wednesday 18 May Level 1 Part 2.

Only after the two consecutive sessions have been attended will you receive a Continued Professional Development (CPD) accreditation.

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

Tuesday 17 May - 1pm to 3pm

This session includes NHS Pension Scheme website, Annual Benefit Statements and roles and responsibilities. The link to Eventbrite is: <https://www.eventbrite.co.uk/e/303377930557>

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

Wednesday 18 May - 1pm to 3pm.

This session includes POL, AW8 and the member journey and the link to Eventbrite can be found here: <https://www.eventbrite.co.uk/e/303379756017>