

NHS Pensions Update – June 2022

Welcome to the June 2022 NHS Pensions Employer Update.

Sharing our performance

Table 1 - Total Transactions (May 2022)

Item	Volume
Total Transactions	182,914
First retirements	8,970
Estimates	5,291
Annual allowance	4,678
Ill health applications	680
AP/ERRBO/AVC	1,078
Bereavements	7,665
Transfers	1,852
Nominations	1,900
Pensions On Divorce	860
Protection of Pay	98
Refunds	1,270
Revised retirements	3,029
Service	3,659
Inbound processing	4,435
Data support	117,525
Pensioner admin	19,924

Table 2 - First Retirements and Pensioners (May 2022)

Item	Volume
Applications Processed	8,970
On Time	87.64%
Amount paid in Lump Sums	£244,121,437.48
Amount of Pension Paid	£798,512,709.57
No. Pensioners in Payment	1,062,490

Table 3 - Employer Helpline statistics (May 2022)

Item	Volume
Total Volume Calls	3,953
Average Handling Time (s)	557
Average Speed of Answer (s)	100

Table 4 - Member Helpline statistics (May 2022)

Item	Volume
Total Volume Calls	24,691
Average Handling Time (s)	621
Average Speed of Answer (s)	695

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.

Total Reward Statement Refresh - June 2022

The annual Total Reward Statement refresh has commenced. The data cut was taken after close of business on Friday 17 June 2022. If the process goes to plan, the aim is for the statements to be made available mid-August as usual. We will confirm the exact refresh date nearer the time.

Changes to member contributions payroll provider briefing pack

We recently shared with you an updated requirements document for payroll providers, setting out the system changes that will need to be made by your payroll provider by 1 October 2022 for the implementation of changes to member contributions. This replaces the previous set of requirements we shared in November 2021.

As a reminder, please share the requirements document with your payroll provider as soon as possible to make sure they're aware of the changes they need to make. If your payroll provider is ESR or NHS Dental Services, they have already been informed, so you don't need to contact them.

If there are any questions about this from either yourselves or your payroll provider, please contact our Stakeholder Engagement Team on nhsbsa.stakeholderengagement@nhs.net

If your payroll provider is unable to implement the legislative changes on 1 October 2022, please inform us directly by email using the Stakeholder Engagement Team email address. Please include an explanation of the reason why the changes are unable to be made for our records.

Now that we have received the updated requirements, we are developing guidance and resources for you as an employer and will keep you updated on progress via this newsletter and our website.

Small lump sum payment – reminder for employers

Due to the transition to the 2015 Scheme, NHS Pensions has seen an increase in members eligible to claim their benefits under the small lump sum payment processes.

To confirm, our existing process is as follows:

When an AW8 is submitted, and the 2015 Scheme benefits have been selected for payment the benefits team check the member record to confirm if they are eligible to claim any portion of their benefits under small lump sum payment.

If they are eligible, the member will be sent an options letter for them to confirm their choices. This will be sent to their email address if held, if not it will be sent to their postal address. The member will then need to review and submit their response before the award can be processed.

The reason we cannot complete part payment of benefits is that we need to ensure that the lifetime allowance information is correct for any benefits paid.

Please note, if we do not receive the response from the member in a timely manner, this could delay their payment. If a payment is delayed, we will assess the record to determine if there is any interest due to the member and this will be processed separately. We ask that all applications to retire are submitted three months ahead of the retirement date.

Please can you ensure when submitting an AW8, that you ensure the member has made a choice about whether they want to claim their 2015 Scheme benefits, as this will aid processing.

We are reviewing the process at this time following comments from employers. We will keep you updated of any developments.

Estimates Changes – information for employers

As you may be aware the charges for providing member estimates has recently changed. [The members estimate request form has been updated and is available on our website.](#)

If a member has an up-to-date Total Reward Statement (TRS) / Annual Benefit Statement (ABS), they will be directed to it unless they meet one of the following criteria:

- If the member is excluded from TRS / ABS
- They have a complex case (e.g. split benefits calculation, drawdown or part time MHO)
- If the member urgently needs a statement before the refresh once the annual update has been received (June to August and October to December only)
- Other estimates than age (e.g. ARER, Ill Health)
- If there has been a significant change to the record that would impact benefits.

Charges still apply for IP valuations and some cash equivalent transfer value quotations for divorce purposes.

Charges for providing hypothetical estimates are still being reviewed. Once we have more information, we will update you via the Pensions Update. A review of the estimates webpage is also included in the changes.

Changes to email addresses and notification to NHS Pensions

We have become aware that organisations have been asked to review the email addresses they use, with some organisations changing this to a non nhs.net/ nhs.uk email account.

If you have amended your email address, then you will need to notify NHS Pensions of any changes via the [contact details forms](#) that can be found on the NHS Pensions website.

If you are wanting to change the POL contact email address as well, you will need to complete the [Pensions Online administrator details form](#) that can be found on the website. Please note, non nhs.net and nhs.uk email addresses will be accepted.

Informing retiring members of submission of their AW8

We are receiving an increasing number of enquiries to our contact centre from members who are planning to retire and believe they have submitted their application a number of months ago, but we haven't yet received their AW8.

In all cases, AW8 applications should be submitted via Pensions Online (POL) or sent to NHS Pensions (where POL is not appropriate) at least three months before the intended retirement date.

If a member has completed their application before this, and you are waiting to submit the form to us, we would ask if possible that you let the member know when you intend to submit the AW8 to us and confirm once this is complete.

Pensions Online (POL) downtime

POL will be available throughout June and July between 7am and 7pm apart from the periods noted below for scheduled system maintenance:

- Sunday 26 June 2022
- Sunday 24 July 2022
- Sunday 21 August 2022

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.

GP Pensions member events

For the first time, NHS Pensions are hosting GP member events. Each session will be two hours long and include presentations on the following topics:

- Which GP certificate – An overview of the different types of GPs and which certificates need to be completed.
- Journey of a member – A journey a GP can follow in multiple schemes and scenarios.
- GP retirement – The process for a GP to follow when retiring.

There will also be an opportunity to ask questions at the end of each session.

The events will be held on the following dates in July 2022:

- Tuesday July 5 2022, 12-2pm - [GP Event 'Which Certificate' 5 July 2022](#)
- Wednesday July 6 2022, 12-2pm - [GP Event 'Journey of a Member' 6 July 2022](#)
- Thursday July 7 2022, 12-2pm - [GP Event 'GP Retirement' 7 July 2022](#)
- Tuesday July 26 2022, 12-2pm - [GP Event 'Which Certificate' 26 July 2022](#)
- Wednesday July 27 2022, 12-2pm - [GP Event 'Journey of a Member' 27 July 2022](#)
- Thursday July 28 2022, 12-2pm - [GP Event 'GP Retirement' 28 July 2022](#)

If you are unable to attend on the dates above, we will also be hosting further events later in the year. Places are limited so please book your space soon.

NHS Pensions member events – July dates

The NHS Pensions member events aim to help members understand everything you need to know about your NHS pension and how to navigate through the Scheme.

We have a number of events planned throughout the year to help you:

- understand what the NHS Pension Scheme is
- find out all you need to know about your Total Reward Statement and Annual Benefit Statement
- explore your retirement options

[You can find links to register for our July 2022 dates on the member hub web page.](#)

Administration Foundation Course

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 who are less than 12 months in post and provides an 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 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 and the events will be held on the following dates in June:

- Wednesday 22 June 2022, 1pm - 3pm - [Guide for new NHS pensions administrators](#)
- Thursday 23 June 2022, 1pm - 3pm [Guide for new NHS pensions administrators](#)

Level 1 GP practice manager training dates – July 2022

There are level 1 GP practice manager training events in July 2022 presenting educational training tailored for practice managers.

The events 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 Wednesday 6 July level 1 part 1, you must also select Thursday 7 July 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

Wednesday 6 July - 1pm to 3pm

This session includes NHS Pension Scheme website, Annual Benefit Statements and roles and responsibilities. The link to Eventbrite can be found [here](#).

GP Practice Manager event level 1, part 2

Thursday 7 July - 1pm to 3pm.

This session includes POL, AW8 and the member journey and the link to Eventbrite can be found [here](#).

June 2022 GP practice manager level 2 training dates

There are Level 2 GP practice manager events taking place in June 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 28 June level 2 part 1, you must also select Wednesday 29 June level 2 part 2.

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

The Level 2 GP Practice Manager events will take place on the following dates:

GP Practice Manager event level 2, part 1

Tuesday 28 June – 1pm until 3pm

This session includes roles and responsibilities and also flexible retirement.

[Link to Eventbrite.](#)

GP Practice Manager event level 2, part 2

Wednesday 29 June – 1pm until 3pm

This session includes leave overview, ill health and family benefits

[Link to Eventbrite](#)

If you register and then are unable to attend, please let us know as soon as possible so that we can reallocate your reserved place to the next available person.

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.ne