

NHS Pensions Update – October 2022

Welcome to the October 2022 NHS Pensions Employer Update.

Sharing our performance

Table 1- Total Transactions (September 2022)

Item	Volume
Total Transactions	78,106
First retirements	11,895
Estimates	5,267
Annual allowance	1,359
Ill health applications	842
AP/ERRBO/AVC	99
Bereavements	7,091
Transfers	1,708
Nominations	1,662
Pensions On Divorce	943
Protection of Pay	103
Refunds	1,986
Revised retirements	124
Service	1,184
Inbound processing	4,446
Data support	24,821
Pensioner admin	14,576

Table 2 - First Retirements and Pensioners (September 2022)

Item	Volume
Applications Processed	11,895
On Time	99.25%
Amount paid in Lump Sums	£241,449,194
Amount of Pension Paid	£831,931,463
No. Pensioners in Payment	1,078,258

Table 3 - Employer Helpline statistics (September 2022)

Item	Volume
Total Volume Calls	2,880
Average Handling Time (s)	543
Average Speed of Answer (s)	136

Table 4 - Member Helpline statistics (September 2022)

Item	Volume
Total Volume Calls	17,956
Average Handling Time (s)	681
Average Speed of Answer (s)	1,203

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.

Pensions Online (POL) downtime for October and November

POL will be available throughout October and November between 7am and 7pm apart from the following dates when there will be downtime for scheduled system maintenance:

- Sunday 23 October
- Saturday 29 and Sunday 30 October
- Sunday 20 November

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.

TRS Refresh

Total Reward Statements (TRS) are now available. We have updated our TRS website information and employer resources.

Department of Health and Social Care announces extension of retire and return easements

Following a public consultation, the Department of Health and Social Care has announced a further extension to retire and return easements beyond the current 31 October 2022 expiry date, through temporary amendments to NHS Pension Scheme regulations.

These easements allow retired and partially retired staff to return to work in the NHS or increase their working commitments without having their pension benefits suspended or reduced (known as abatement).

What was included in the consultation

Since March 2020, the Department of Health and Social Care has suspended rules in the NHS Pension Scheme to allow retired and partially retired staff to return to work or

increase their working commitments without having their pension benefits suspended or reduced.

From 25 March 2020 to 25 March 2022, these temporary easements were provided by [section 45 of the Coronavirus Act 2020](#). The Department of Health and Social Care then extended the temporary 'retire and return' easements until 31 October 2022.

Following a public consultation which ran from 28 August to 12 September 2022, the Department of Health and Social Care has decided the temporary easements should be extended beyond the 31 October 2022.

Extending the temporary easements

In the consultation response, the Department of Health and Social Care has announced that it is extending the temporary retire and return easements as follows:

- the 16-hour rule will be suspended to 31 March 2023, with further proposals for its permanent removal from 1 April 2023
- abatement of special class status members will be suspended to 31 March 2025
- abatement of draw-down members of the 2008 Section and 2015 Scheme will be suspended to 31 March 2023

You can find out more about what the easing of the retire and return restrictions means on [the COVID-19 guidance on support for retired members web page](#).

Updates on what we're doing to support you

In February 2022 we contacted all pensioner members who have:

- retired and returned to work
- chosen to draw down part of their benefits

This was to tell them that the temporary retire and return easements were being extended to 31 October 2022.

We will write to affected members again to inform them of the outcome of the consultation.

You can read [the full consultation outcome on the Department of Health and Social Care's website](#).

Process reminder for pensionable pay on retirements

There has been an increase in queries from employers relating to pensionable pay for 1995 Section members. We want to provide a better understanding for you of how our processes work for awards and sub awards and help alleviate some your concerns.

Changes were implemented to ensure consistency of process across all pension benefit calculations. This means we no longer require 1995 pensionable pay for active members for awards and revised awards.

Retirement application

Please do not send us pensionable pay (TPP) figures for 1995 Section members. The system calculates the pensionable pay (TPP) for all retirements from the data you provided.

The field to enter pensionable pay (TPP) on POL on the retirement application form (AW8) was removed and we are currently reviewing the paper retirement form to remove this section.

We also ask you not to email the pensionable pay (TPP) figures following submission of the retirement application form (AW8). If we are unable to process the award for any reason, we will request the information we need from you during our initial checks.

Revised retirements (AW171)

In June, we advised you that the final phase of the system functionality to automate the AW171 process was complete and advised employers that the AW171 is no longer required.

Following a completed retirement, submit the SD55E form if there are any revisions to the final details. The form SD55E will automatically trigger a revised retirement workflow which the team will then process. Subsequent changes reflected on ESR will generate revised retirement benefits in the same way unless the pensions override functionality is used.

Member contribution changes on GP forms

To coincide with the changes to member contribution rates from the 1 October 2022, we have published a number of new GP forms for use from the 1 October. These include:

- GP Locum Form A – for use from 1 October 2022 to 31 March 2023
- GP Locum Form B – for use from 1 October 2022 to 31 March 2023
- GP Solo form for work from 1 October 2022 – 31 March 2023
- 2021/22 Type 1 Annual Certificate, the 2021/22 Type 1 Limited Company Certificate and the 2021/22 Type 2 self-assessment form – available at the end of November at the earliest

Member contribution changes - confirmation of processes around standard rate overtime for part time members

We recently held some employer events on the member contribution changes. During the recent POL employer event, we confirmed we would clarify the situation on whether re-banding is required when standard rate overtime takes a part time member into a new contributions tier.

We have asked the Department of Health and Social Care and they have confirmed that in addition to the information set out in 2.1.9 of the Payroll Providers Pack, employers also need to take into account any overtime worked by a part time member. Where a part time member works additional overtime (within WTE and paid at the standard rate), which results in the member moving into a different pensionable earnings band, this should be treated as an in-year change to pay. In this scenario the information in 2.1.8 of the Payroll Providers Requirement should be followed.

We are updating both the Payroll Provider Requirements and employer information pack to reflect the above.

If you need more information on the member contribution changes, please visit the [employer information](#) page on our Changes to public service pension schemes [web hub](#) to find:

- An employer information pack including a summary of the changes, details of the new contribution tiers and rates, information on how the contribution rates should be determined and how to use actual annual rates of earnings, and further guidance on topics such as mid-year changes, overtime, bank staff, sick pay, and maternity or paternity pay.
- A copy of the Payroll Provider Requirements providing more detailed information on the application of the changes within payroll systems
- A copy of the letter that has been sent to all active members explaining the changes. We are currently writing to deferred members at this time
- Resources to help communicate the changes to colleagues including posters and screensavers

If you are a POL employer, you can also access our POL User Guides on topics such as amending contributions via the [POL webpage](#) on our Employer Hub.

Escalation processes

The Stakeholder Engagement Team email account is only to be used for escalations of serious ill health cases. For all other escalations, please contact the employers email account or helpline in the first instance.

If they are not able to resolve your issue, they will refer directly to the relevant team or finally to Stakeholder Engagement to resolve.

The Stakeholder Engagement Team are still able to be contacted for:

- Meetings and forum requests

- Educational needs
- Website information and Ask Us clarification

Royal Mail postal strikes

Royal Mail are planning to take postal strike action on a number of dates throughout October and November which are:

- Thursday 20 October
- Tuesday 25 October
- Monday 28 November

This may affect applications being sent to NHS Pensions if they are posted via Royal Mail.

As a reminder, to avoid possible delays to a member's application you can send them direct to NHS Pensions via nhsbsa.pensionscanquery@nhs.net

NHS Pensions member events

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

We have a number of events planned throughout the year to help them which includes:

- Understand what the NHS Pension Scheme is
- Find out all they need to know about their Total Reward Statement and Annual Benefit Statement
- Explore their retirement options

You can find links to register for the member events up to December 2022 on the [member hub web page](#).

GP Pensions member events

NHS Pensions are hosting more GP member events to help members further understand the Scheme. Each session will be two hours long and there will be an opportunity to ask questions at the end of each session.

The presentation topic and event dates are as follows:

Which GP certificate

This event will provide an overview of the different types of GPs and which certificates need to be completed. There will be a 20-to-30-minute presentation with a Q&A for anyone to ask questions.

Event date and time: Thursday 3 November 2022, 12.30pm until 1.30pm. [Click here to register on Eventbrite.](#)

Journey of a member

This event provides information on the journey a GP can follow in multiple schemes and scenarios. There will be a 45-to-60-minute presentation with a Q&A at the end.

Event date and time: Thursday 10 November 2022, 12pm until 1.30pm. [Click here to register on Eventbrite.](#)

GP retirement

This event will cover the process for a GP to follow when retiring. There will be a 20-to-30-minute presentation with a Q&A at the end for people to ask any questions.

Event date and time: Thursday 24 November 2022, 12.30pm until 3.30pm. [Click here to register your place on Eventbrite.](#)

We are working on producing videos of each session which will be available to view on our website and YouTube channel, if you are unable to attend on the dates above.

There is no charge for our events and places are limited so please register as soon as possible. The details can be found on our website [here.](#)

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 next course will be advertised in December's Employer Update.

GP practice manager training dates – October and November

Level 1 GP practice manager event

Our next Level 1 GP practice manager event is available in October and includes educational training tailored for practice managers, delivered virtually via Microsoft Teams.

This session includes information on the NHS Pension Scheme website, Annual Benefit Statements, roles and responsibilities, Pensions Online (POL), the AW8 and the member journey.

The date and time for the next session are:

- Thursday 27 October 2022 from 10am to 3.30pm. [Click here to register](#)

By attending this event you will receive a Continued Professional Development (CPD) accreditation attendance certificate.

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.net

Level 2 GP practice manager event

Our next Level 2 GP practice manager event is available in November and includes educational training tailored for practice managers, delivered virtually via Microsoft Teams.

This session includes roles and responsibilities, flexible retirement, leave overview, ill health and family benefits. The date and time for the next session are as follows:

- Wednesday 9 November from 10am until 3.30pm. [Click here to register](#)

Practice managers will need to attend the whole of the training sessions to receive a Continued Professional Development (CPD) accreditation.

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.net

Pensionable pay and contributions event

The Stakeholder Engagement Team will be hosting a training event via Microsoft Teams on pensionable pay and contributions.

Further information on the content and how to register for this event will be provided in next month's Employers Update.