

NHS Pensions Update – December 2022

Welcome to the December 2022 NHS Pensions Employer Update.

Sharing our performance

Table 1- Total Transactions (November 2022)

Item	Volume
Total Transactions	83,901
First retirements	13,331
Estimates	8,256
Annual allowance	1,826
Ill health applications	760
AP/ERRBO/AVC	28
Bereavements	8,789
Transfers	2,354
Nominations	3,103
Pensions On Divorce	915
Protection of Pay	70
Refunds	2,103
Revised retirements	100
Service	1,594
Inbound processing	3,966
Data support	23,382
Pensioner admin	13,324

Table 2 - First Retirements and Pensioners (November 2022)

Item	Volume
Applications Processed	13,331
On Time	99.53%
Amount paid in Lump Sums	£188,798,215.32
Amount of Pension Paid	£905,816,215.14
No. Pensioners in Payment	1,086,171

Table 3 - Employer Helpline statistics (November 2022)

Item	Volume
Total Volume Calls	2,776
Average Handling Time (s)	460
Average Speed of Answer (s)	72

Table 4 - Member Helpline statistics (November 2022)

Item	Volume
Total Volume Calls	29,808
Average Handling Time (s)	608
Average Speed of Answer (s)	214

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.

Disclosure of senior managers' remuneration - Greenbury 2023

We anticipate that the Greenbury functionality within Pensions Online (POL) will be available from Wednesday 4 January 2023. Requests for disclosure information should be received by NHS Pensions between 4 January 2023 and 28 February 2023 to enable us to provide you with the necessary disclosure information to meet your reporting timescales.

Who should employers request Greenbury figures for

The Department of Health and Social Care Group Accounting Manual (GAM) 2022-23 states that the remuneration report must disclose information on those persons in senior positions having authority or responsibility for directing or controlling major activities within the group body. This means those who influence the decisions of the entity as a whole rather than the decisions of individual directorates or departments.

The GAM states that the chief executive or accounting/ accountable officer must be asked to confirm whether this covers more than the executive and non-executive directors. It is usually considered that the regular attendees of the entity's board meetings are its senior managers.

The NHS Foundation Trust Annual Reporting Manual (ARM) defines senior managers as 'those persons in senior positions having authority or responsibility for directing or controlling the major activities of the NHS foundation trust. The ARM goes on to say, 'such persons will include advisory and non-executive board members.'

Information NHS Pensions will provide

NHS Pensions will provide disclosure information for executive directors and other senior managers, as confirmed by the Chief Executive. We will not carry out any calculations for non-executive directors because they do not receive any pensionable remuneration.

Where an executive director is also a medical General Practitioner (GP)

Disclosure information will only be provided where the GP is an employed senior manager or executive director. If the GP is employed (i.e. contract of service) as a senior manager

or executive director and pays pension contributions then they will be classed as an officer for pension purposes and Greenbury disclosure will apply.

If the GP is also engaged under a contract for services arrangement (i.e. self-employed) then Greenbury disclosure will not apply to this element of their work. Under this arrangement the GP is afforded practitioner status which is not included in the calculation of the accrued pension, lump sum and cash equivalent transfer value (CETV).

Where NHS Pensions is asked for disclosure information for a GP and their pension record holds practitioner membership only then we will assume they are a non-executive director, and no information will be provided. It is important for employers to check that the pension records of their senior managers are completely updated.

NHS Pensions will provide information based on calculations using NHS staff (officer) membership only.

This exercise only relates to remuneration in public bodies which means GP practices and most direction bodies are not required to take part.

How to submit disclosure information requests for the 2023 exercise

1. Employers must request Greenbury senior manager remuneration disclosures for the 2022/23 financial year via Pensions Online (POL).
2. These screens will also be used by NHS Pensions to return the requested pension, lump sum (where applicable) and CETV to each employer.
3. Employers will only be able to view their own disclosure requests.

Employers will need to nominate a user and allocate Greenbury access to that user before disclosures can be requested. Employers will be able to use the previous year's user and password details. If you have any queries about registering a user on POL, please visit www.nhsbsa.nhs.uk/employer-hub/pensions-online

The Greenbury screens will also support:

- communication between employers and NHS Pensions concerning Greenbury queries
- requests for re-calculation of Greenbury disclosures
- comparison of this year's disclosure figures with last year's figures

Full guidance on how to register and use the POL system to make your requests is now available on our website at: <http://www.nhsbsa.nhs.uk/Pensions>

You should avoid using the comments box on POL unless necessary as this prevents cases running through the system automatically. If a member was part of the exercise last year, the previous year's figures will be provided. Employers do not need to request this information via the comment box.

Reducing comments will mean more submissions will run through automatically and therefore speed up the process.

Ill health retirement applications – new forms

NHS Pensions has updated the ill health retirement forms, making the question on life expectancy mandatory for all applications. If this is not completed, an application form will be returned causing potential delay for the members application.

Please destroy any old paper versions of the form(s) you may have. The new versions of the forms are available under [‘retirement’ on the Employer Forms page of the Employer Hub](#) and include:

- Consideration of entitlement to ill health retirement benefits (AW33E) version 19 Ill Health AW33E
- Consideration of entitlement for early payment of deferred benefits due to ill health (AW240) - version 13 Ill Health AW240

GP end of year forms for 2021/22

The following forms and guidance notes [are now available on the NHS Pensions website in the Member Hub](#):

- 2021/22 Type 1 Annual Certificate
- 2021/22 Type 1 Limited Company Certificate
- 2021/22 Type 2 self-assessment form and guidance notes

All Type 1 and Type 2 practitioners must complete the relevant certificate or form and submit to Primary Care Support England (PCSE) for work in England, or their Local Health Board (LHB) for work in Wales, by Tuesday 28 February 2023.

GPs who only worked in England must submit their certificate or form to PCSE by Tuesday 28 February 2023.

The easiest way to submit to PCSE is via PCSE Online. PCSE will inform GPs when this is available for 2021/22 submissions. Guidance on how to submit on PCSE Online can be found at <https://pcse.england.nhs.uk/services/gp-pensions>

Certificates and forms can also be submitted via www.pcse.england.nhs.uk/contact-us or by post to:

Primary Care Support England, PO Box 350, Darlington, DL1 9QN.

GPs who only worked in Wales must submit their certificate or form to the LHB by Tuesday 28 February 2023.

Department of Health and Social Care launches consultation on introduction of retirement flexibilities

The Department of Health and Social Care has announced a consultation on proposals to amend the NHS Pension Scheme rules to help retain more experienced NHS clinicians and remove barriers to staff returning to work following retirement.

What is included in the consultation

Building on the actions it set out in its Our Plan for Patients in September, the government launched a consultation on 5 December 2022.

The consultation proposes changes to the NHS Pension Scheme to support NHS staff to remain in work for longer. The proposed changes would introduce a number of flexibilities that may enable staff to work more flexibly up to and beyond retirement age.

The proposed changes would also fix the unintended impacts of inflation to reduce the risk that some NHS staff, including senior clinicians, may face annual allowance charges as a result of the recent high inflation.

The proposed changes include:

- A new partial retirement option to support staff to work more flexibly up to and beyond retirement age. This may enable older staff to partially retire, or for those that have already retired to return to work, and either claim all or part of their pension whilst continuing to work and build more pension benefits.
- Allowing retired staff to re-join the NHS Pension Scheme if they return to work, making returning to work in the NHS more attractive.
- Removing limits on the number of hours recently retired staff can work in the first calendar month after returning to work.
- Fixing the interaction between the pension tax system and inflation to ensure senior clinicians have more headroom against the £40,000 pension tax annual allowance. If introduced, this would mean senior doctors would either be less likely to receive a tax charge or may receive a smaller tax charge.
- Allowing staff working in Primary Care Networks (PCNs), such as GPs and general practice staff, to access the NHS Pension Scheme. Previously they have had to apply for time-limited access on an ad-hoc basis.

When will the changes be made

The consultation is open for 8 weeks and closes on Monday 30 January 2023.

After the consultation is closed, the Department of Health and Social Care will publish the outcome of the consultation. The Department of Health and Social Care expects that any changes may be implemented in late spring 2023.

How to respond

You can view the [consultation documents and respond](#) online.

The consultation will close at 11.45pm on Monday 30 January 2022.

Pensions revaluation headline statement – DHSC

The NHS Pension Scheme employer contribution rate increased on the 1 April 2019 from 14.3% to 20.6% plus the employer levy of 0.08%.

The Department of Health and Social Care's consultation response announcing the rise, published in March 2019, confirmed the available funding to meet the associated costs and that a transitional arrangement would operate in 2019/20 where employers in the Scheme would continue to pay 14.38%.

Although our initial expectation was that this transitional arrangement would only be in place for 2019/20, the approach continued in subsequent years, and we can now confirm that the transitional arrangement will continue again in 2023/24 in order to maximise stability for employers in the sector, particularly in light of the continuing recovery from the COVID-19 pandemic.

This means that for 2023/24, all employers should continue to pay 14.3% in employer contributions plus 0.08% employer levy under their normal monthly payment process to the NHS Pension Scheme. NHS England will continue to make payments to the Scheme for organisations covered by the commitment to the NHS.

As referenced in the 2019 consultation response, the 6.3% increase was split into two elements: i) a 2.5% foreseen element, which was the increase expected at the time of Budget 2016, and ii) an unforeseen element accounting for the remaining 3.8%. Organisations outside the scope of the commitment to the NHS will receive funding for the unforeseen costs and will have to manage the impact of the foreseen element, in a continuation of the original 2019/20 arrangement.

For 2023/24, Arm's Length Bodies (ALBs), excluding NHS England, will continue to receive the same available funding support and the funding and administrative arrangements will continue to be the same as in 2022/23.

We are currently writing to university medical schools to let them know that the specific contribution from university medical schools will remain as advised by the NHSBSA for 2019/2020.

Stakeholder Engagement events

The Stakeholder Engagement Team run a series of events throughout the year providing regular updates and delivering educational training.

Please see our [Employer Events page on the Employer Hub](#) for upcoming events. These events are free of charge and some include CPD accreditation. The NHSBSA does not endorse any other third-party training events.

If your organisation would like to request training or attendance directly from the Stakeholder Engagement Team, please complete the [event/ meeting request form](#) and email the team for consideration: nhsbsa.stakeholderengagement@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 several 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 March 2023 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 is on Tuesday 10 January 2023, and you can [register here](#).

Christmas opening hours for contact centre

The proposed Christmas opening hours for our contact centre are as follows:

- Friday 23 December - 8am until 6pm
- Monday 26 December – closed
- Tuesday 27 December – closed
- Wednesday 28 December, Thursday 29 December and Friday 30 December - 8am until 6pm
- Monday 2 January 2023 – closed
- from Tuesday 3 January 2023 – business as usual