

NHS Pensions Update – July 2023

Welcome to the July 2023 NHS Pensions Employer Update.

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Sharing our performance

Table 1- Total Transactions (June 2023)

Item	Volume
Total Transactions	73,621
First retirements	11,364
Estimates	7,520
Annual allowance	2,735
Ill health applications	828
AP/ERRBO/AVC	148
Bereavements	9,431
Transfers	1,618
Nominations	3,171
Pensions On Divorce	645
Protection of Pay	29
Refunds	1,383
Revised retirements	77
Service	1,367
Inbound processing	4,327

Data support	20,987
Pensioner admin	7,991

Table 2 - First Retirements and Pensioners (June 2023)

Item	Volume
Applications Processed	11,364
On Time	98.93%
Amount paid in Lump Sums	£229,033,833
Amount of Pension Paid	£1,007,635,626.18
No. Pensioners in Payment	1,105,023

Table 3 - Employer Helpline statistics (June 2023)

Item	Volume
Total Volume Calls	2,746
Average Handling Time (s)	573
Average Speed of Answer (s)	406

Table 4 - Member Helpline statistics (June 2023)

Item	Volume
Total Volume Calls	25,005
Average Handling Time (s)	652
Average Speed of Answer (s)	751

From May 2021 we have amended the way 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 – July and August 2023

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

- Sunday 23 July
- Saturday 29 July
- Sunday 20 August

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.

Processing of cash equivalent transfer value (CETV) calculations

Following a change to the discount rate used for public service pension schemes that HM Treasury announced on 30 March 2023, the factors used to calculate transfer values for non-Club transfers and pensions on divorce changed.

We are now able to recommence the processing of any paused CETV calculations and aim to complete all outstanding cases by 18 August.

We ask that you only make contact if the above date has passed. New cases will be registered and completed within the standard timeframes.

Partial retirement update and live event

A reminder that we are holding an NHS Pensions Employer Live Event on partial retirement at 10am on Wednesday 19 July 2023.

The event is aimed at payroll providers and pension administrators and will focus on the partial retirement application process and the tools available to support members through that process ahead of partial retirement being expanded to include 1995 Section benefits from 1 October 2023.

The event will be held through Microsoft Teams – there will be no access to your camera, microphone, or the chat function, but there will be a Q&A function which will open towards the end of the presentation.

After the event we will send a summary to all employers, including the links to the online resources, employer factsheet and forms.

Our guidance for members, which is available on our [partial retirement webpage](#), will be updated by early next week with information on the application process.

Locally agreed payments – pensionable or non-pensionable

We have received enquiries from employers seeking clarification in relation to locally agreed payments and whether they are pensionable or not.

Local agreed payments may be pensionable up to whole-time provided the member meets the normal criteria for being pensionable in this Scheme unless they have chosen to opt out. These include members being paid at a locally agreed higher than standard NHS rate of pay for similar types of work undertaken.

Such as:

- Locum consultants (specialist) on zero hours contracts
- Consultants (part-time specialists) working extra sessions
- Locum doctors (non-specialist) on zero hours contracts
- Doctors (part-time non-specialist) working extra hours
- AFC (officers) on zero hours contracts
- AFC part-time (officer) working extra hours

Rates of pay may differ depending on type of work covered.

Waiting list initiative payments (WLI) are also pensionable but depend on the form of payment and whether the member is whole-time or part-time before voluntarily working extra sessions.

- If the WLI is being paid as overtime, it is pensionable so long as it does not exceed whole-time.
- If the WLI is being paid in the form of a one-off bonus, then it is not pensionable.

Important:

Where the member has more than one role/contract/employment, employers must ensure that the member has separate pensionable employment records to reflect this. This is especially important if the member has different rates of pay, standard weekly hours, sessional lengths etc. Without this information NHS Pensions cannot accurately calculate pension benefits.

Employer reminder about transfers-in for retired and returned members

In April 2023 changes were made to the NHS Pension Scheme that enabled members who have retired with 1995 Section benefits to join and continue to build benefits in the 2015 Scheme if they return to work.

Following these changes, we are receiving a number of transfer-in applications. However, we are finding a number of cases where when we check the members record, the member does not have an open position.

Please ensure members are aware of the need to make a transfer application within the normal time frame. Where a member makes an application to transfer in, please ensure the member has an open pension record created at your soonest opportunity to avoid delays to the transfer in process.

Post-migration email addresses

Following on from an email migration IT Project within the NHSBSA, the following email accounts are to be used going forward by NHS Pension Employers. Members must not be advised to use these accounts.

Email: nhsbsa.pensionemployers@nhsbsa.nhs.uk - For general employer queries, case progress updates and supporting documentation and information relating to a request other than those listed below.

Email: stakeholderengagement@nhsbsa.nhs.uk - For meetings and forums, educational needs, escalation issues and website and Ask Us information.

Email: illhealthcases@nhsbsa.nhs.uk - For employers to send AW33E if they need to be dealt with urgently.

Email: datamanagement@nhsbsa.nhs.uk - For all queries in relation to data issues. If the query is in relation to a record that urgently needs updating for a member claiming their

benefits, the employer must email with the subject Award Pending. These will be dealt with within 48 hours.

Email: polhd@nhsbsa.nhs.uk - For queries relating to Pensions Online (POL) for updating account details, account unlocks, PIN and password resets and sending change of administrator forms.

Email - polia3@nhsbsa.nhs.uk – For any additional information required for the processing of a members retirement.

Email: nhsbsa.trsemployers@nhsbsa.nhs.uk - For all queries relating to Total Reward Statements (TRS).

Email: pensionsfinance@nhsbsa.nhs.uk For NHS Pensions Finance queries from all employers.

Email: schemeaccess@nhsbsa.nhs.uk - For scheme access IP, APMS and direction bodies queries.

Email: greenbury@nhsbsa.nhs.uk - For all queries relating to the Greenbury exercise.

Email: nhsbsa.schemeaccess@nhs.net - For changes to their organisation contact details, including names, telephone numbers, postal addresses and email addresses for Pension Administrators, Finance Directors, Human Resource Directors and Chief Executives.

Email: annualallowance@nhsbsa.nhs.uk - For queries relating to Annual Allowance.

Apart from nhsbsa.pensionemployers@nhsbsa.nhs.uk which comes through to CCS on Dynamics and get our standard auto-reply, the other mailboxes will send their own auto-reply to all emails received. As this is from an Outlook account, it will come up as an 'Out of Office' message but the content will explain when the employer should get a response.

Greenbury query window

If you have any Greenbury queries, you must ensure these are submitted before 31 July 2023.

We will not be able to respond to any queries received after this date, as the window for queries will have closed.

TRS reminder

Updated Total Rewards Statements (TRS) and Annual Benefit Statements (ABS) will be published in August for NHS Pension Scheme members to view. We will be sharing links to resources for promoting statements to your employees in next month's Employer Update.

Guidance to members on applying for your pension benefits

It has been brought to our attention that active members who are applying for their retirement benefits are sending their retirement application form AW8 directly to NHS Pensions bypassing their employer.

To prevent this from happening, we are adding further information to our Member Hub as a reminder to members, including a news article. This information reiterates that if a member is an active member or has opted out but remains in NHS employment, they must inform their employer in the first instance.

Their employer will then issue the retirement application form AW8. Members should complete parts 6 -14 of the form and it must be returned to their employer who will complete parts 1 to 5. The employer will then submit the form to NHS Pensions on their behalf.

We have highlighted that we are unable to process any retirement applications unless all parts have been fully completed by both the member and employer.

Stakeholder engagement events

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

Please see the [employer events section](#) of 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: stakeholderengagement@nhsbsa.nhs.uk.

Administration foundation course dates

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 Scheme 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 details for the next available courses are as follows:

- [Wednesday 9 August, 10am – 11am](#)
- [Wednesday 4 October, 10am – 11am](#)
- [Tuesday 7 November, 10am – 11am](#)

GP Practice Manager training for 2023

Further dates are available for the Level 1 and Level 2 GP practice manager events, which include educational training tailored for practice managers, delivered virtually via Microsoft Teams.

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

Level 1 GP Practice Manager events

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 details for the next available course are as follows:

- [Wednesday 23 August, 10am to 1pm](#)
- [Tuesday 17 October, 10am to 1pm](#)
- [Wednesday 22 November, 10am to 1pm](#)

Level 2 GP Practice Manager events

These sessions include roles and responsibilities, flexible retirement, leave overview, ill health and family benefits. The details for the next available course are as follows:

- [Wednesday 6 September, 10am to 1pm](#)
- [Tuesday 31 October, 10am to 1pm](#)
- [Thursday 30 November, 10am to 1pm](#)

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 on the [member events section](#) of the [Member Hub](#).