

NHS Pensions Update – September 2024

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If you don't normally receive this email directly from NHS Pensions or you'd like any other members of your staff to receive a copy, please email

stakeholderengagement@nhsbsa.nhs.uk to be added to our distribution list.

The Employer Charter has been temporarily removed whilst it undergoes an update and a revision. We'll republish the updated version as soon as possible. Thanks for your understanding.

Sharing our performance

Table 1 – Total Transactions (August 2024)

Item	Volume
Total Transactions	106,507
Apply Annual Increases	2,254
Buy Additional Pension	532
Buy AVCs	195
Buy ERRBO	224

Calculate and Pay Retirement Benefits	12,929
Claim Protection of Pay	10
Complaints	128
Death Benefits Calculated and Paid	6,878
Defer Benefits	2,249
Determine Continuing Entitlement	129
Elect of Scheme Pays	606
Make Enquiry	38,796
Manage Complaint	1,408
Manage Data	20,062
Manage Ongoing Payments	1,457
Manage Overpayment	7
Nominate or Change Beneficiary	3,870
Pension Share/Pensions on Divorce	1,284
Recalculate Retirement Benefits	2,849
Receive Estimate of Benefits	5,480
Receive Savings Statement	280
Refund of Contributions	2,084
Transfers	2,796

Table 2 – First Retirements and Pensioners (August 2024)

Item	Volume
On Time	92%
Amount paid in Lump Sums	£418,578,676
Amount of Pension Paid	£102,122,540
No. Pensioners in Payment	1,160,592

Table 3 – Employer Helpline statistics (August 2024)

Item	Volume
Total Volume Calls	3,053
Average Handling Time (s)	601
Average Speed of Answer (s)	265
Total Volume Emails	2,401
Service Level (48 hours)	77.7%
Processing Rate (per hour)	7

Table 4 – Member Helpline statistics (August 2024)

Item	Volume
Total Volume Calls	36,866
Average Handling Time (s)	676
Average Speed of Answer (s)	411

Total Volume Emails	34,638
Service Level (48 hours)	76.9%
Processing Rate (per hour)	8.5

Pensions Online (POL) downtime – October 2024

POL will not be available on Sunday 20 October due to scheduled system maintenance.

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

NHS Pension Scheme membership number

All members of the NHS Pension Scheme are given an 8-digit membership number. Members can find their membership number at the top of any letters they've received from us.

Older letters may show it like this, 'SD 00 / 123456', but this format is being phased out and replaced with an 8-digit membership number. Existing reference numbers will not change.

Web content will change over time to start referring to 'membership number'. This change will ensure that all members have the same understanding, as we know some members may not understand what an SD number is. We will also be creating social media posts to highlight the change to members on the [NHS Pensions X](#) (formerly Twitter) account.

When making calls using our member helpline, contact centre colleagues will start referring to membership number, instead of SD number. It will help us if members provide the correct membership number when contacting us. If they do not know their membership number, they can provide their National Insurance number instead.

If they also have pension benefits relating to a pension credit, dependant's pension or other NHS Pension Scheme provision, they may have additional membership numbers.

Use Pensions Online (POL) to input AW8's for partial retirement

A video is now available on our website explaining how to use Pensions Online (POL) to input AW8's for members wanting to take partial retirement: [NHS Pensions Employer resources | NHSBSA](#)

You should not submit AW8's via email if you have access to POL.

Top tips

- Remember to provide the contact number and email address of the member so we can keep them updated

You should record the reason for retirement in the drop-down box as 'Partial Retirement' not 'Age'. In the next box you can select 'Age' or 'VER'

REMINDER: have your employer (EA) code ready when you call us

Earlier this month, we sent out a mailing to inform you that from Monday 16 September, you'll be asked for your employer (EA) code when you call us.

If you're contacting us from a GP practice, you'll need to use the code '2015'.

This will ensure you get the right help more quickly.

What is an employer (EA) code?

An EA code is a 4-digit reference number unique to each employer who offers its employees access to the NHS Pension Scheme.

How do I find my employer (EA) code?

Your EA code is the same code you use when submitting pensions contributions to our Finance team.

However, if you're an employer and you don't have access to your EA code, email nhsbsa.pensionsemployers@nhsbsa.nhs.uk. You must include your:

- name
- position in organisation
- organisation name
- organisation address

How do I request an employer (EA) code?

If you're an employer who needs to register and get an EA code, [read the guidance on our website to check which form you must complete](#).

If you're a practice that has merged with another practice, you may need to apply for a new EA code. If you have any queries, email schemeaccess@nhsbsa.nhs.uk

Stakeholder Engagement events

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

Continuing Professional Development (CPD) accreditation and details of upcoming events are available on the [Employer Hub on our website](#).

We do not endorse any 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: stakeholderengagement@nhsbsa.nhs.uk

Administration Foundation Course dates for 2024

This free 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 course are available on the [Employer Hub on our website](#).

GP Practice Manager training

Further dates are available for the Level 1 and Level 2 GP practice manager (free) events, which include educational training tailored for practice managers, delivered via Microsoft Teams. Practice managers need to attend the whole training session to receive a Continuing Professional Development (CPD) accreditation.

Foundation course

The next available course will be on 4 October 2024. [Visit our Eventbrite page](#) for more information and to reserve your space.

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 next available course will be on 17 October 2024 at 10am. [Visit our Eventbrite page](#) for more information and to reserve your space.

Level 2 GP Practice Manager events

These sessions include roles and responsibilities, flexible retirement, leave overview, ill health, and family benefits.

The next available course will be on 30 October 2024 at 10am. [Visit our Eventbrite page](#) for more information and to reserve your space.

Member events dates for October 2024

These regularly held events aim to help members understand everything they need to know about their NHS pension. Whether they are a new member wanting to learn how to navigate the Scheme, or a long-time member wanting to refresh their knowledge, these events are engaging, informative and a must for any NHS Pension Scheme member.

Remember to share these events with your employees. On average, 99% of attendees would consider recommending our member events to a colleague, with an average quality rating of 4.4/5.

All our member events have options for both members in the 2015 NHS Pension Scheme and members in both the 1995/2008 and 2015 schemes.

Some of our member events sell out quickly. To ensure that members have the option to sign-up for our events, encourage them to regularly view the [Member events page of the Member Hub](#).

Please inform your employees to click on the following member events for more information, including dates, times and an event overview.

- [Introduction to the 2015 Scheme and the NHS Pension Scheme benefits \(2015 Scheme\)](#)
- [Your Annual Benefit Statement explained \(all Schemes\)](#)