

## NHS Pensions Update – June 2023

Welcome to the June 2023 NHS Pensions Employer Update.

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### Sharing our performance

*Table 1- Total Transactions (May 2023)*

Item	Volume
Total Transactions	66,472
First retirements	10,734
Estimates	6,705
Annual allowance	2,808
Ill health applications	928
AP/ERRBO/AVC	124
Bereavements	8,130
Transfers	1,526
Nominations	2,865
Pensions On Divorce	566
Protection of Pay	24
Refunds	1,408
Revised retirements	99
Service	1,362
Inbound processing	3,760
Data support	17,720

Pensioner admin	8,193
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*Table 2 - First Retirements and Pensioners (May 2023)*

Item	Volume
Applications Processed	10,734
On Time	98.02%
Amount paid in Lump Sums	£226,778,992.16
Amount of Pension Paid	£1,004,818,750.18
No. Pensioners in Payment	1,102,846

*Table 3 - Employer Helpline statistics (May 2023)*

Item	Volume
Total Volume Calls	2,764
Average Handling Time (s)	586
Average Speed of Answer (s)	856

*Table 4 - Member Helpline statistics (May 2023)*

Item	Volume
Total Volume Calls	17,501
Average Handling Time (s)	573
Average Speed of Answer (s)	1,160

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 - June and July 2023**

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

- Sunday 23rd July

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.

## **Partial retirement update**

We're working closely with the Department of Health and Social Care (DHSC), NHS Employers and NHS England to work through the new rules to allow members to take partial retirement from 1 October 2023 and help employers get ready for the change.

The changes mean members with benefits in the 1995 Section, 2008 Section and the 2015 Scheme will be able to take from 20% up to 100% of their pension benefits, carry on working, and continue to build up their NHS pension in the 2015 Scheme.

Information for members thinking of submitting a partial retirement application.

We've updated our webpage on partial retirement with the latest information on how members will be able to apply for partial retirement.

It explains that members don't need to rush to submit their application for partial retirement – they should take some time to find the right work and pension balance for them. It also explains that the first thing they need to discuss with their employer what new working arrangements will work for both them and their employer, to enable them to reduce their pensionable pay by at least 10%, for the first 12 months after taking partial retirement.

You'll find useful information on the NHS Employer's website at [www.nhsemployers.org/publications/using-flexible-retirement-support-retention](http://www.nhsemployers.org/publications/using-flexible-retirement-support-retention), including different ways members may be able to reduce their pensionable pay. For example, they could change some of their responsibilities, work fewer contracted hours, or move to a role that requires less from them. There are also some types of working patterns they could do from time to time, that are not pensionable, such as overtime above full-time hours.

The application process is like applying for retirement.

The process for Partial Retirement is almost the same as the application to retire.

An AW8 will need to be completed. The difference is a short additional form specific to applications for partial retirement. This will be published in July 2023. It includes a section for you to confirm the members new working arrangements as the employer and a section for members to say what percentage of their pension they'd like to take.

Although the additional form can't be completed and submitted until sometime in July members can still apply to take partial retirement from October, should they want to. Due to the changes, we'll aim to process these applications more quickly than the usual 3 months required, and we'll make it possible for applications that need it, to be backdated to 1 October.

There will be more in our next update.

We'll tell you more on the steps to take and where to find the latest support in our next update in July 2023. This will include factsheets, a "How to" guide for employers, explanation of the forms and how to complete them. We'll also include more detail on how member decisions around partial retirement could be different if they are affected by the McCloud ruling.

You can find the latest information by checking [www.nhsbsa.nhs.uk/nhs-pension-retirement-flexibilities](http://www.nhsbsa.nhs.uk/nhs-pension-retirement-flexibilities).

## **NHS Pensions employer live event – introduction of partial retirement changes**

NHS Pensions are holding an employer live event on 19 July 2023 from 10am – 11:30am to discuss the changes to the NHS Pension drawdown process which will take effect from 1 October 2023.

Please book your place via Eventbrite - [NHS Pensions Employer Live Event - Drawdown Flexibilities Tickets, Wed 19 Jul 2023 at 10:00 | Eventbrite](#).

## **Reminder annual allowance information deadline**

Employers are required in legislation to provide information to NHS Pensions which enables pension savings statements to be provided to members. This statement informs members whether they have exceeded the annual allowance limit in the NHS Pension Scheme.

The requirements specify that employers must provide pay (and membership) information to NHS Pensions by 6 July following the end of the tax year.

We are expecting an influx of requests for annual allowance statements in July. In order to be able to respond to these requests, we must have the available pay and membership information from employers for 2022/23 by 6 July 2023 (information for previous years should already have been received). If the member's record is not updated by the employer by this date, HM Revenue and Customs (HMRC) may impose fines and charges on employers of:

- up to £300 per member, and
- £60 per day per member until the member's records are updated.

If the information is not provided, we will not be able to conduct the necessary calculations to check whether the member has exceeded the annual allowance limit. We will not be able to generate a pension savings statement and notify potentially affected members in a timely manner. Members could be subject to fines and late payment penalties from HMRC.

Special arrangements were made for PCSE/NHS England in relation to the provision of information for GPs once their end of year certificates have been received and the provision of pension information to NHS Pensions after HMRC's deadline.

## **Revised employer scheme access guidance for ARRS and PCN direct hires working on DES**

New guidance is available for employers for direct hire Additional Roles Reimbursement Scheme (ARRS) employees and direct hire Primary Care Network (PCN) employees working on the Network Contract Directed Enhanced Services (DES).

The guidance has been published on our [Scheme access webpage](#).

This follows earlier Scheme access guidance on the impact of the [introduction of retire and return for members with 1995 Section benefits on closed direction / determination documents and open access arrangements](#).

The PCN scenarios currently available on our [Information for practitioners and non-GP providers](#) webpage are being reviewed and will be updated as soon as possible. Please note that time limited access is not available after 31 March 2023. PCNs who meet the criteria for scenarios 3 or 6 can apply for open determination or IPEA access as set out in the guidance. Access remains unchanged for existing PCNs who meet the criteria for one of the other eight scenarios (except scenarios 3 and 6).

## **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: [nhsbsa.stakeholderengagement@nhs.net](mailto:nhsbsa.stakeholderengagement@nhs.net)

## **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 – 11:30am  
(<https://www.eventbrite.co.uk/e/570722455227>)

## **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 28 June, 10am – 1pm (link - <https://www.eventbrite.co.uk/e/570707590767>)
- Wednesday 23 August, 10am – 1pm (link - <https://www.eventbrite.co.uk/e/570724441167>)

### 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:

- Thursday 6 July, 10am – 1pm (link - <https://www.eventbrite.co.uk/e/570714401137>)

- Wednesday 6 September, 10am – 1pm (link - <https://www.eventbrite.co.uk/e/570726386987>)

## **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 June 2023 on the [member events section](#) of the [Member Hub](#).