

NHS Pensions Update – April 2024

In this month's newsletter:

- Sharing our performance - March 2024 (All employers)
- Pensions Online (POL) downtime - April and 2024 (All employers)
- Contributions to the NHS Pension Scheme are changing (All employers)
- Independent Provider (IP) End of Year Certificate 2023-24 (All employers)
- New Fair Deal (NFD) End of Year Certificate 2023-24 (All employers)
- Greenbury update (All employers)
- Stakeholder engagement events (All employers)
- Administration Foundation Courses (All employers)
- GP Practice Manager training (GP Practice Managers only)
- NHS Pensions members events (To be shared with all members)

If you don't normally receive this email directly from NHS Pensions or you would 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 will republish the updated version as soon as possible. Thanks for your understanding.

Sharing our performance

Table 1- Total Transactions (March 2024)

Item	Volume
Total Transactions	95,728
Apply Annual Increases	1,266
Buy Additional Pension	514
Buy AVCs	53
Buy ERRBO	19
Calculate and Pay Retirement Benefits	8,562
Claim Protection of Pay	18
Complaints	76
Death Benefits Calculated and Paid	7,605

Defer Benefits	1,109
Determine Continuing Entitlement	98
Elect for Scheme Pays	492
Make Enquiry	46,047
Manage Complaint	856
Manage Data	11,040
Manage Ongoing Payments	1,388
Manage Overpayment	153
Nominate or Change Beneficiary	1,851
Pension Share/Pensions on Divorce	842
Recalculate Retirement Benefits	3,752
Receive Estimate of Benefits	5,651
Receive Savings Statement	317
Refund of Contributions	1,477
Transfers	2,542

Table 2 - First Retirements and Pensioners (March 2024)

Item	Volume
On Time	99.30%
Amount paid in Lump Sums	£282,059,618.00
Amount of Pension Paid	£65,456,924.00
No. Pensioners in Payment	1,135,245

Table 3 – Employer Helpline statistics (March 2024)

Item	Volume
Total Volume Calls	3,164
Average Handling Time (s)	545
Average Speed of Answer (s)	104

Table 4 - Member Helpline statistics (March 2024)

Item	Volume
Total Volume Calls	39,692
Average Handling Time (s)	579
Average Speed of Answer (s)	75

Please note, from May 2021 we amended the way we report the number of transactions shown in these tables. The number provided for each function, now records all items of work or transactions we have undertaken within that service area, including the handling of calls, emails and support work. This change has been made to provide a more comprehensive overview of transactional volumes on a month-by-month basis.

Pensions Online (POL) downtime

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

- Saturday 27 April 2024
- Sunday 26 May 2024

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.

Contributions to the NHS Pension Scheme are changing

In our March employer update we provided further information about the second phase of changes to member contributions that must be implemented from Monday 1 April 24.

We have received clarification about what contribution rate should be applied where employers are unable to estimate the earnings of bank or locum staff who have no prior pensionable earnings. An employer must apply a contribution rate of 6.5% to the member, based on the new contribution rate tables from Monday 1 April 24 (prior to this date was 6.1%).

Where a bank or locum staff member's annualised earnings can be readily assessed, the employer will need to allocate the correct contribution rate.

This information will be included in the latest payroll requirements.

Independent Provider (IP) End of Year Certificate 2023-24

You will shortly be able to access the 2023-24 End of Year Certificate [via our website](#).

As part of your Independent Provider status, you are legally required to complete end of year certificates for each employer code you have declaring Scheme members, contributions and contact details.

IP employers must download and complete the certificate and return along with the staff list to pensionsfinancereporting@nhsbsa.nhs.uk by Friday 31 May 2024.

Please note that it is important, and also a legal requirement, that all member records are also updated by Friday 31 May 2024. Without this, we will be unable to verify and sign off your returned certificate as we would be unable to perform all required reconciliations and controls.

If your organisation contributed to the scheme in 2019/20, 2020/21, 2021/22 or 2022/23 and you are still to complete these statements, these are also available [on our website](#).

New Fair Deal (NFD) End of Year Certificate 2023-24

You will shortly be able to access the 2023-24 End of Year Certificate via our [website](#).

As part of your New Fair Deal (NFD) status, you are legally required to complete end of year certificates for each employer code you have declaring Scheme members, contributions and contact details.

NFD employers must download and complete the certificate and return to pensionsfinancereporting@nhsbsa.nhs.uk by Friday 31 May 2024.

Please note that it is important, and a legal requirement, that all member records are also updated by Friday 31 May 2024.

If your organisation contributed to the scheme in 2019/20, 2020/21, 2021/22 or 2022/23 and you are still to complete these statements, these are also available [on our website](#).

Greenbury Update

We have been successfully working through all the Greenbury requests for this year.

All queries need to be sent to us by Friday 31 May 2024.

This is when the window for Greenbury 2024 will close, and we cannot respond to any queries after that date.

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 CPD accreditation and details of upcoming events are available on our website:

www.nhsbsa.nhs.uk/employer-hub/employer-events

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

[Find out more on the events section of the Employer Hub](#)

Administration foundation course dates

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.

[Find out more on the events section of the Employer Hub](#)

GP Practice Manager training

Further dates are available for the Foundation, Level 1 and Level 2 GP practice manager (free) 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.

Foundation course

Details for the next available course (Wednesday 5 June 2024) are available [on our website](#).

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. Details for the next available course (Friday 28 June 2024) are available [on our website](#).

Level 2 GP Practice Manager events

These sessions include roles and responsibilities, flexible retirement, leave overview, ill health, and family benefits. Details for the next available course (Wednesday 10 July 2024) are available [on our website](#).

[Book a place](#)

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:

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

Find out more on the [Member events section](#) of the Member Hub.