

## NHS Pensions Local Authority update

Welcome to this update for Local Authorities who have access to the NHS Pension Scheme. If you are also a 'direction' employer, you will have received an email from my colleague Verity last week.

Verity and I work closely together with employers and I am your main contact on the Stakeholder Engagement Team for Local Authority issues.

We would like to know your views so please complete [this short survey](#). It will only take a few minutes of your time.

NHS Pensions issues a monthly newsletter to employers. This newsletter contains important information about the administration of the NHS Pension Scheme. The newsletter is sent by email to the main pensions contact that we have in our database for each organisation. We do also hold a separate distribution list so that others can also request to receive the newsletter. If you would like to be added to our distribution list please email [nhsbsa.pensionemployernewsletter@nhs.net](mailto:nhsbsa.pensionemployernewsletter@nhs.net).

### Cyclic updates

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In order for the Scheme to run smoothly and effectively we depend on information from you, our local Scheme administrators. If you submit your Year End data via spreadsheet please make sure that the following information is included:

- Pension start date
- Date of change
- Whole time / part time indicator
- MHO or Special Class status
- Actual hours / sessions
- Bank indicator
- Contribution rate
- National Insurance number
- Employment type
- Standard hours for the grade

Further information including both the annual update spreadsheet and associated guidance notes are available on our website: <http://www.nhsbsa.nhs.uk/Pensions/4114.aspx>.

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our local Scheme administrators.

We will be releasing details of the 2016/2017 process in January via our Employer Newsletter and will contact non Pensions Online employers directly with both the spreadsheet and instructions to complete.



## Annual Benefit Statement

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2016 Annual Benefit Statements (ABS) have now been released and are accessible for the majority of members via the Government Gateway. Information in the Annual Benefit Statement comes from the data you provide through your annual return each year.

The Government Gateway is accessible through the Total Reward Statement portal at <https://www.totalrewardstatements.nhs.uk/> and the 'need help' section contains frequently asked questions. Additionally, we have also released a number of videos on our YouTube channel, **NHS Business Services Authority**, guiding members through this process.

The ABS provides members with the following information about their NHS Pension:

- Pension
- Lump sum (if applicable)
- Survivor pension
- Hypothetical annuity cost
- Reckonable and calendar length membership totals for 1995/2008 members
- Maximum lump sum commutation examples
- Life assurance lump sum
- Death benefit nominee information
- 2015 pensionable earning breakdown for officers
- Contribution information for the year preceding the statement including employee, employer, Added Years, Early Retirement Reducation Buy Out (ERRBO) and Additional Pension (AP) contributions.



## Estimates

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An estimate is a personalised summary that shows information unique to a member. This includes a breakdown of estimated benefits that you may receive at retirement. For NHS Pension Scheme members, the place to initially access this information is the Annual Benefit Statement and this is classed as their first age based estimate.

Where a member is looking for an early retirement estimate, they can use the information on the statement with the early retirement calculator which is available on the Members Hub area of our website at: <http://www.nhsbsa.nhs.uk/Pensions/4202.aspx>. If a member is looking for a different type of estimate, there will be a charge which is set out on our schedule of charges available at: <http://www.nhsbsa.nhs.uk/Pensions/4193.aspx>.

It is important to note that payment must be received prior to the request being received by NHS Pensions.

This does not affect an employer's ability to request a redundancy estimate without charge or an ill health estimate where a 'consideration of entitlement to ill health retirement benefits (AW33E)' form is held by NHS Pensions.



## Digitisation

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As part of our programme of work to make our services 'digital by default' NHS Pensions are currently developing an online portal for all employers and members. Our key aim for this project is

to make our services more accessible and user friendly for all types of members and employers.

The new self service system will allow members and employers to access NHS pension information online. For example, it will give members the ability to view and take ownership of their pension records and update contact details without having to go through the call centre or write to NHS Pensions.

The portal will also provide an enhanced service for employers, providing a digital route for input of financial information. This system will eventually replace existing systems and become the only route to submit information regarding the NHS Pension Scheme. No N3 connection will be necessary.



## **Redundancy – What are my responsibilities during redundancy events?**

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We have published a factsheet on the responsibilities of employers in redundancy situations, including your responsibilities following the changes in April 2015. This is a frequent question raised with NHS Pensions, in particular employers concerns regarding large capitalisation liabilities.

Further information on this important topic is available on our website at:  
<http://www.nhsbsa.nhs.uk/Pensions/4147.aspx>.

With this being such a complex area with a number of variables, we would recommend that employers seek legal advice when considering redundancy events.



Please distribute this to colleagues who you think may find this information useful. If you have any feedback regarding this newsletter please email [jonathan.leach1@nhs.net](mailto:jonathan.leach1@nhs.net)

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