

# NHS Pension Scheme

## 2020/04

- Who should read:**
- Chief Executives of Health Boards
  - Payroll Managers
  - IT and GP Practice Managers
  - Staff who generate data for SPPA

**Action:** To read and circulate as appropriate

**Subject:** Annual Return data 2019-20

**Date:** 13 March 2020

### The purpose of this circular is to:

- request annual return data for 2019-20 for all active members
- confirm deadlines
- inform employers about the dedicated online Annual Returns area
- advise the correct method of data submission
- indicate the schedule of relevant dates
- amendments to previously submitted data
- i-Connect Implementation

Employing authorities are required to disclose information to enable the scheme manager to undertake its statutory duties. To allow the pension records of individual members of the scheme to be updated, SPPA requires information about all staff in active pensionable employment on 31 March each year.

The **deadline** for data submission is **31 May 2020**. This is to ensure the SPPA has adequate time to process and plan production of Annual Benefit Statements and Annual Allowance calculations.

As this year is a leap year please remember that a member can only receive a maximum of 365 days service credit in our scheme.

### Failure to submit data – Pensions Regulator

If SPPA does not meet its statutory obligation to produce an Annual Benefit Statement (ABS) for all active scheme members by 31 August 2020 we are obligated to report this to the Pensions Regulator. To provide clarity to the Regulator we may include the names of all employers who have failed to meet the **31 May 2020** deadline set by SPPA, which allows for the timely production of ABS.

For more information on your responsibilities please read this [HMRC guidance](#).

## Online Annual Returns Guidance

To support timely and accurate annual returns, we have a [dedicated area](#) on our website containing important bulletins and resources designed to raise awareness of known issues. This is currently being updated for 2019-20. Full guidance on completing the annual return is also provided. Employers should use these resources in preparation for their annual returns.

## Data Submission and Support

### **NHS Health Boards should continue to submit data in the existing format via ATOS Origin.**

For NHS GP Practices and Direction Bodies all annual and Nil returns must be submitted through the Employer Data Management (EDM) portal. If you do not have a registered EDM user in your organisation, or have a data or submission enquiry, please contact the EDM Support Team via:

- telephone us on 01896 893000 (Option 4,1,2)
- email us at [SPPAEDM-Enquiry@gov.scot](mailto:SPPAEDM-Enquiry@gov.scot)

### **Our Annual Return timescales:**

- we will issue final a reminder to Payroll departments from 18 May 2020
- we will evaluate whether all returns are received by 31 May 2020
- we will escalate non-compliance with Chief Executives from 1 June 2020
- Employers will become liable for HMRC sanctions on 6 July 2020
- we will provide a report to the Pensions Regulator on 1 Sept 2020

### **Amendments to previously submitted data**

The SPPA are aware that employers may need to revise information previously supplied on an annual return or leaver form. This can happen as a result of retrospective pay rises or late notification of pay. The only way to update data already submitted is via the NSR06 Amendment form, held on the EDM system.

This ensures that the data is in the correct format to over-write what was previously submitted. The SPPA are unable to accept any other format at this point in time and employers should not send any other type of spreadsheet. Any file other than the EDM version of the NSR06 will not be applied to the member record.

### **i-Connect implementation**

As previously indicated, SPPA will be implementing the Heywood i-Connect Data Management Portal over the next year. The i-Connect payroll extract file specification guide will be made available and a circular will be published providing a link to the guide and a proposed timetable for launch. In the meantime if you have any enquiries relating to i-Connect please email [sppaconnect@gov.scot](mailto:sppaconnect@gov.scot)

**Thank you for your continued cooperation with this matter**

In recent years our collaborative approach to this exercise has resulted in a year on year increase in the total number of Annual Benefit Statements issued. With your ongoing help, our intention is to meet the target set by The Pensions Regulator and have 100% of active members statements issued by 31 August 2020.

**Any questions?**

Please contact [michelle.hogg@gov.scot](mailto:michelle.hogg@gov.scot) if you have any enquiries about this circular.

**Dev Dey**

Head of Customer Services  
13 March 2020