



HSC Pension Service

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Business Services Organisation

# EMPLOYER TECHNICAL UPDATE

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HSC (P) 03-20

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# 1. Foreword

The ETU provides important details on the dates of submission, contact details etc. for the annual disclosure of information relating to Senior Managers Cash Equivalent Transfer Values. As a number of functions have transferred from Payroll Shared Services to HSC Pension Service it is important that responsible officers are aware of the correspondence address for submissions.

We have also included a reminder to of the volume of information available on the Scheme website to assist members understand and plan for better management of potential Annual or Lifetime Allowance Charges.

## 2. Senior Managers Cash Equivalent Transfer Value Figures

All requests for disclosure information as a result of the Greenbury Report must be received by HSC Pension Service Payroll Pension Team (PPT) before 31 January 2020 to enable us to provide you with the necessary disclosure information by 1 April 2020. This will allow you time to prepare and submit your draft accounts by 24 April 2020. Please note, we cannot guarantee that requests or queries received after 31 January 2020 will be dealt with by 1 April 2020.

### Who should employers request Greenbury figures for?

The definition of 'Senior Managers' given in the Department of Health Group Manual for Accounts 2015-16 (para 2.33) is:

*"....those persons in senior positions having authority or responsibility for directing or controlling the major activities of the NHS body. This means those who influence the decisions of the entity as a whole rather than the decisions of individual directorates or departments."*

It goes on to say that *"The Chief Executive or Accounting/Accountable Officer should be asked to confirm whether this covers more than the executive and non-executive directors (for CCGs – attendees at Governing Body meetings). It is usually considered that the regular attendees of the entity's board meetings are its senior managers."*

### General Data Protection Regulation

There is a presumption that information about named individuals will be given in all circumstances. However, organisations must inform individuals in advance of the intention to disclose information about them, invite them to see what is intended to be published and notify they can object under Article 21 of the General Data Protection Regulation (GDPR).

**Requests/Templates should be sent to [monica.smyth@hscni.net](mailto:monica.smyth@hscni.net) no later than 31 January 2020**

**Action for Employers:** Please ensure that all requests for disclosure information are submitted to HSC Pension Service before the required date.



### 3. Annual Allowance Information (reminder)

HSC Pension Service has published and distributed a Newsletter to scheme members specifically informing them of how Lifetime Allowance and Annual Allowance works and how these can cause additional tax charges linked to a member's pension savings. The newsletter can be accessed here [Members Newsletter](#)

The HSC Pension Service website also provides an extensive library of information on factsheets and guides for members to better inform themselves of the legislation regarding Pension Taxation along with on line calculators to assist members in the calculation of potential charges. Further information can be found here [Tax Information](#)

HSC Pension Service continues to provide assistance to scheme members in managing their Annual and Lifetime Allowance information through a number of avenues as follows:

- From October 2019 members are able to access their Annual Allowance data view through the Member Self Service (MSS) Portal
- Bespoke Annual Allowance/Lifetime Allowance pension seminars and workshops continue to be delivered to Scheme Members
- HSC Pension Service has established a dedicated Annual Allowance Team. This team will work on issuing Annual Allowance statements on request to officer Scheme members, in addition to those who have breached the £40,000 limit as well as deal with all Annual Allowance queries for current and previous years.

In the next few months The HSC Pension Service Annual Allowance Team will be delivering bespoke clinics in each Trust/Organisation to allow Scheme members to meet with and speak to a member of the team to address any questions/queries they may have regarding their Annual Allowance calculations

**Action for Employers:** Please ensure staff affected are aware of the clinics being organised and the information available on the HSC Pension Scheme website



## 4. Contact Us

**By writing to us at:-**

HSC Pension Service

Waterside House

75 Duke Street

Londonderry

BT47 6FP

**Via e- mail at:-** [hscpensions@hscni.net](mailto:hscpensions@hscni.net)

**By Telephone:** 028 7131 9111 (9.00am to 4.00pm – Monday to Thursday; 9.00am to 12.00pm Friday)



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If you have any suggestions for the newsletter or would like a particular topic covered in future publications please do not hesitate in contacting us by emailing: [hscpensions@hscni.net](mailto:hscpensions@hscni.net)

