Information Requested:

I am writing to request information relating to the pension tax relief issue that is currently impacting a significant number of NHS employees across the country. I would be grateful if you could respond to the following questions. Please advise if you need any clarification and I would be happy to provide this.

1. Whether your organisation has a policy of offering payment equivalent to the employer pension fund contributions to employees who opt out of the scheme? And if so:
   a) when was this policy adopted? Please note that we do not have an equivalent policy. However, we have an alternative policy whereby we introduced a Life Time Allowance Retention Bonus Scheme in October 2018 and an Annual Allowance Retention Bonus Scheme in August 2019.
   b) is this option offered to all employees by default, or is it considered on a case by case basis following requests? The schemes are open to those staff that have reached the allowance it applies to.
   c) how many employees have taken advantage of this policy since its adoption? 8
   d) what was the total value of payments made until the end of July 2019? Amount paid to date (paid April 19) £16,925.

2. Whether your organisation has made an assessment of the number of employees who are likely breach the annual allowance? If so, what assessment was made? We have not undertaken an assessment.

3. How many employees have left employment as a result of pension taxation issues? None

4. How many employees have applied to reduce their working hours as a result of pension taxation issues? And how many such applications were successful? None

5. Whether an internal briefing or assessment on the impact of changes to pension taxation has been provided? If so, could a copy of that document be provided? None

Publication Scheme:

As part of the Freedom of Information Act all public organisations are required to proactively publish certain classes of information on a Publication Scheme. A
publication scheme is a guide to the information that is held by the organisation. EPUT’s Publication Scheme is located on its Website at the following link https://eput.nhs.uk