



Dan Keane,
Secretary,
Retired Members Association.

28th February 2023

Dear Dan,

The following is a chronology of the updates from NSSO and ESBS regarding the payments of pension arrears. Albeit that there are a number of payments in arrears I hope that you will see that the matter is receiving attention both from TUI and the relative government Departments. TUI will continue to engage on the outstanding matters on behalf of the retired members and report on progress.

22nd September 2022

Engagement with the National Shared Service Office regarding retired ETB Pensioners:

- Responsibility for payments to all retired ETB staff resides with the National Shared Services Office (NSSO).
- There has been some delays in the addition of pension increases to some retired ETB staff. ESBS has set up a working group with representation from ETBs, ETBI, NSSO and DoE. One of the areas that is currently being examined is the application of any increases due to retired ETB staff.
- Progress is being made in relation to the application of these increases and the current position is that 6,856 pensioners have now received the October 2020 increases. The remaining 1,725 pensioners are being actively reviewed in conjunction with the relevant ETBs to determine whether or not these retired staff are due October 2020 increases.
- A workshop was held with ETBs on Wednesday 25th May 2022 which involved review of the pay scales, allowances and any further potential pay increases due. The Department of Education have requested that all ETBs complete this exercise and provide the requisite information regarding any pay increases due to NSSO by the end of Quarter 3 2022. NSSO have committed to having all pay increases due to all ETB pensioners by end Quarter 4
- The working group is also working through other areas which have been identified by ETBs, ETBI and NSSO as needing improvements. To date the following has been completed:
- NSSO have confirmed they will notify ETBs of the death of their ETB Pensioners so S&C benefits can be instructed to NSSO
- NSSO have provided a contact person for ETBs to contact with urgent queries which need addressing.
- NSSO have issued 1100 pension declaration forms to their Pensioners aged over 80 in two batches.
- New Pension Instruction forms were issued to ETBs in April 2022.
- Sub group have drafted Activities & Responsibilities document which is currently under review with NSSO, due to issue to ETBs in May 2022.



- DoE are drafting a Pensions Overpayment Policy which can be used in Athlone and NSSO in line with DPER guidelines and other policies.
- Sub group has drafted new EGen25 Pensioner Instruction Forms to standardise the instruction process for ETBs to NSSO for:
 - (i) Pre 2013 Pensioners
 - (ii) SPS Pensioners
 - (iii) S&C Pensions
 - (iv) Supplementary Pensions
 - (v) Pension Abatement.

6th Dec 2022

NSSO / ETB Developments

A working group has been established and is working through areas which have been identified by ETBs, ETBI and NSSO as needing improvements. To date the following has been completed:

- NSSO have confirmed they will notify ETBs of the death of their ETB Pensioners so S&C benefits can be instructed to NSSO
- NSSO have provided a contact person for ETBs to contact with urgent queries which need addressing
- New Pension Instruction forms were issued to ETBs in April 2022.
- NSSO have issued 1100 pension declaration forms to their Pensioners aged over 80 in two batches.
- Sub group have drafted Activities & Responsibilities document which is currently under review with NSSO. Will issue to ETBs once NSSO revert on same.
- DoE are drafting a Pensions Overpayment Policy which can be used in Athlone and NSSO in line with DPER guidelines and other policies.
- NSSO have processed majority of pension increases for October 2020 and are working with ETBs to ensuring all Oct 2020 increases have been applied.
- ESBS facilitated a workshop with ETBs on 25/05/2022 to provide resources to assist with the instruction of Pensioner Increases by ETBs and the implementation of increases by NSSO of the July and October 2021 and February 2022 increases. ETBs are to issue instructions to NSSO by 30/09/2022 and NSSO to action all instructions by 31/12/2022.
- NSSO have updated their system configurations and are cleansing ETB Pensioner Data on their system as instructions are received to ensure the implementation of Pensioner increases will be a smoother process going forward and individual instructions will not need to be submitted by ETBs for all pensioners. There will continue to be a small cohort of pensioners in ETBs which may need to be instructed individually if their pensions are based on averaged/personal scales / allowances.
- NSSO are continuing to implement all ETB pensioner increases and cleanse data as increases are applied. They are working overtime to do this and processing 700/800 each pay period. ETBs have returned the majority of increases with some awaiting direction on legacy scales in order to calculate increases due. NSSO updating ESBS after each pay period as to the numbers processed in the pay period.
- NSSO will be able to update their scales and allowances and apply increases due as per building momentum to pensioners on standard scales and allowances. ESBS will work with them in relation to this piece to ensure the correct sequencing. ETBs to send instructions in relation to increases due on personal/legacy scales and allowances.
- ETBs to work with NSSO in relation to the instruction of revised lump sums as a result of building momentum also.



10 Feb 2023

The following is the latest update on pension adjustments.

- ETB Pensioners are paid by the National Shared Services Office, not the ESBS.
- Approximately 6000 pension calculations have been cleansed, and NSSO will apply increases for October 2021 by March 2023
- Approximately 8000 increases have been returned to the NSSO from ETBs
- The outstanding increases are to be applied for by April 2023 by the NSSO
- 451 are increases outstanding from across the ETB sector (generally relating to legacy/personal scales and allowances)
- The list of any pensioners on averaged scales/allowances is to be sent to ETBs by the end of February 2023 by NSSO for updates to be instructed by ETBs.
- The NSSO will arrange calls with individual ETBs about queries regarding any overpayments/underpayments.
- All Scales and Allowances will be updated when 1st October 2021 increases have been applied
- February 2022 scale increases to be updated by May 2023
- October 2022 scale increases to be updated for July 2023
- Allowance increases will then be applied.
- The plan is for March 2023 increases to be confirmed expeditely

As noted, the vast majority of our members (these numbers are inclusive of all grades) are up to date with October 2021 increases, and it is intended that all increases to October 2022 will be completed by May 2023. A further update on increases due after October 2022 will issue in due course.

28th February 2023

For clarity, ETBs previously calculated the pensions – and any subsequent adjustments – for every individual and supplied those calculations to the NSSO who then paid the pension on the basis of the calculation. The NSSO did not engage on the calculations, nor was it in a position to recalculate without referring back to the ETB. ETBs would then be required to recalculate for all pensioners and forward final payment amounts each time there was a change eg a percentage increase.

ESBS has been working with the NSSO to update software systems to enable the NSSO to calculate the increases automatically in the same way as pay increases are processed automatically. In doing so the NSSO and ESBS refer to 'cleansing' files i.e. updating files with the NSSO to allow for such automatic updating without a need to refer back to the ETB.

NSSO have worked with ESBS to update their system configuration and with ETBs to cleanse their 8,622 ETB pensioners and where possible set them up on the appropriate scale, allowance and



service decimal to ensure all future increases can be applied in a more efficient and timely manner for ETB Pensioners. To date, over 130 scales and 110 allowances have been documented and added to the system by NSSO to cater for the ETB Pensioners. These will need to be maintained by ESBS and updated by NSSO on an ongoing basis based on Circular Letters and instructions by the Department. To date, 6,805 have been cleansed with the remaining pensioners to be queried with the ETBs by NSSO and cleansed as soon as possible. Below is the status of the ETB pensioners as of 16th February 2023.

Increases	Teachers	SNAs	Admin	FET	SOLAS	Maintenance	TOTAL
1 st October 2021 increases	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	6805 complete (79%)
2 nd February 2022	x	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Of the 6805 cleansed, just teachers are left to be updated. Teacher scales to be updated for 16 th March Teacher allowances to be updated by 27 th April
1 st October 2022	x	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	As Above
1 st March 2023	x	x	x	x	x	x	Increases to be applied to all cleansed pensioners by End April 2023
1 st October 2023							To be applied in October 2023

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Please note that by the start of May 2023 it is hoped that all pensions will be up to date and that amendments subsequently, eg October 2023, will be made automatically and in line with pay adjustments for the relevant serving grades.

The TUI has further meetings scheduled on the issues of pension payments and arrears and will keep you updated as the meetings occur.

Kind Regards,

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