

## Bulletin index by topic

### Contents

Added Pension (FPS 2015) .....	3
Age discrimination .....	3
Annual Benefit Statements (ABS) .....	3
Auto-Enrolment .....	3
Commutation .....	3
Compensation Scheme .....	3
Contributions .....	3
Data Protection and Security .....	4
Deferred Benefit Statements (DBS) .....	4
Divorce, dissolution of civil partnership, annulment.....	4
FPS Benchmarking .....	4
Funding .....	4
Government Actuary's Department .....	4
Governance.....	5
Guidance for members .....	5
Guidance for practitioners.....	5
Ill-health retirement .....	5
Indexation and revaluation.....	5
Internal Dispute Resolution Procedure (IDRP) .....	5
Legislation .....	6
Local Pension Boards .....	7
Medical appeals .....	7
Membership.....	7
Pay .....	7
Pensions Dashboard .....	8
Re-employment .....	8
Scheme Advisory Board .....	8
Special Members – FPS 2006 .....	8
State Pension and National Insurance (including contracting-out).....	9
Survivor Benefits.....	9
Tax.....	10
The Pensions Ombudsman .....	11
The Pensions Regulator .....	11
Transfers .....	12



## Added Pension (FPS 2015)

- Overall limit of extra pension 2017/2018: Bulletin 2
- Increase from 1 April 2018: Bulletin 6

## Age discrimination

- Public sector age discrimination – EAT update: Bulletin 5, and Bulletin 5 Appendix 2

## Annual Benefit Statements (ABS)

- Plain English edited Annual Benefit Statement: Bulletin 9, and Bulletin 9 Appendices 1 and 2
- Crystal Mark 22141 and conditions of use: Bulletin 9, and Bulletin 9 Appendices 3 and 4
- Survey of 2018 APB process developed in collaboration with Local Pension Board Effectiveness Committee: Bulletin 11
- Launch of 2018 survey, request for responses by 31 October 2018: Bulletin 12
- 2018 ABS survey deadline extended to 14 November 2018: Bulletin 13

## Auto-Enrolment

- Transitional delay: Bulletin 2
- The Employers' Duties (Miscellaneous Amendments) Regulations 2017 [SI 2017/868]: Bulletin 2
- Transitional delay: Bulletin 3

## Commutation

- Commutation factors – modified members: Bulletin 4
- New commutation factors: Bulletin 13

## Compensation Scheme

- LGA quick guide to ill-health and injury benefits: Bulletin 4, and Bulletin 4 Appendix 1
- New style ESA (contribution based) – deduction from injury pensions – advice from DWP: Bulletin 7

## Contributions

- Contributions holiday – the procedure for each FRA to report and pay the tax due on unauthorised payments: Bulletin 1, and Bulletin 1 Appendix 7
- Contributions holiday – a spreadsheet for each FRA to complete with details of unauthorised payments: Bulletin 1, and Bulletin 1 Appendix 8
- Contribution rates 2018-19: Bulletin 6, and Bulletin 6 Appendices 1 and 2

## Data Protection and Security

- Background to General Data Protection Regulation: Bulletin 1
- Government Response to scams consultation: Bulletin 2
- PLSA guide “GDPR Made Simple”: Bulletin 2
- The Pension Regulator’s presentation – “Data challenges in the pensions landscape and GDPR”: Bulletin 2, and Bulletin 2 Appendix 3
- TPR Quick Guides to record keeping, measuring data, improving data: Bulletin 3
- GDPR – six practical steps for FRAs: Bulletin 5, and Bulletin 5 Appendix 3
- GDPR – template privacy notice for FRAs: Bulletin 8
- GDPR – responsibility for issue of privacy notice: Bulletin 8
- HMRC General Data Protection Regulation (GDPR) privacy notice: Bulletin 9

## Deferred Benefit Statements (DBS)

- Production of a standard DBS template planned: Bulletin 10

## Divorce, dissolution of civil partnership, annulment

- Pension sharing on divorce – transition members: Bulletin 3
- Supreme Court ruling – McDonald – implication for future divorce cases in Scotland: Bulletin 5

## FPS Benchmarking

- FPS benchmarking exercise launched: Bulletin 12
- FPS benchmarking exercise update: Bulletin 13

## Funding

- Home Office assumptions exercise: Bulletin 1
- HO Letter. Financial arrangements for firefighter pensions – LOGASnet Returns. Pension Estimates 2017/18 to 2023/24: Bulletin 1, and Bulletin 1 Appendix 1
- Spreadsheet. Pension Top-up grant 2018. Pension Deficit/Surplus Estimates 2017/18 to 2023/24. Declaration of assumptions: Bulletin 1, and Bulletin 1 Appendix 2
- Top-up grant claims to be submitted via new DELTA online data collection system: Bulletin 7
- FPS 2015 ill-health charge (same as for FPS 1992 and FPS 2006): Bulletin 9
- 2016 Valuation: Bulletin 12

## Government Actuary’s Department

- Autumn budget 2017 – GAD technical bulletin providing summary: Bulletin 3
- Commutation factors – modified members: Bulletin 4
- Indexation of GMP in public service pension schemes – consultation outcome: Bulletin 5, and Bulletin 5 Appendix 4
- Valuation data – exclusion of data: Bulletin 8
- GAD technical bulletin relating to FPS 2016 Valuation and link to relevant documents: Bulletin 12
- Home Office letter regarding change to SCAPE discount rate and impact on GAD factors: Bulletin 13, and Bulletin 13 Appendix 1

## Governance

- TPR Governance and Administration survey: Bulletin 1
- TPR Governance and Administration survey 2017 – results: Bulletin 8
- Fire and Police Local Pension Board Governance – link to slides: Bulletin 8
- TPR Governance and Administration survey 2018: Bulletin 13

## Guidance for members

- FPS 2015 promotional leaflet for new members: Bulletin 8
- CARE build up flyer: Bulletin 8
- Factsheet “Topping up your State Pension”: Bulletin 9
- Guides and sample documents page added to website. Short guide to FPS 2015 first in a series of new guides for members: Bulletin 10

## Guidance for practitioners

- Introduction of pension query form for submission to Bluelight team: Bulletin 9, and Bulletin 9 Appendices 5 and 6
- Factsheet: “Eligibility to the pension scheme”: Bulletin 10
- Reminder – new way of submitting queries to the Bluelight team: Bulletin 10
- Guides and Sample Documents page added to website. New resources – Guide to Disclosure of Information Requirements; Full list of discretions (across all schemes); Short guide to FPS 2015: Bulletin 10
- A log of queries to, and responses from, Bluelight team available on website: Bulletin 11
- Addition of individual consolidated regulations on FPS Regulations and Guidance website: Bulletin 11
- Technical note giving details of The Police and Firefighters’ Pensions (Amendment) Regulations 2018 [SI 2018/997]: Bulletin 12
- Presentations given at Fire Pensions Annual Conference, 17 – 18 September 2018: Bulletin 12
- Training for administrators on calculating tax liability and related processes: Bulletin 12, and Bulletin 12 Appendix 2

## Ill-health retirement

- LGA quick guide to ill-health and injury benefits: Bulletin 4 and Bulletin 4 Appendix 1
- IQMP Guidance – 4 October 2012: Bulletin 4, and Bulletin 4 Appendix 2
- PO determination – Fire Authority should not “blindly” accept IQMP opinion: Bulletin 13

## Indexation and revaluation

- HM Treasury written statement confirming Public Service Pension Indexation and Revaluation for 2018: Bulletin 5

## Internal Dispute Resolution Procedure (IDRP)

- Retention of two-stage process: Bulletin 9

## Legislation

- The Firefighters' Pension Scheme (England) (Amendment) Regulations 2017 [SI 2017/888] and The Firefighters' Pension Schemes and Compensation Scheme (Amendment) (England) Order 2017 [SI 2017/892]: Bulletin 2, and Bulletin 2 Appendix 1
- Consultation on amendments to survivors' benefits in FPS 2006 and various amendments to FPS 1992, 2006 and 2015 – draft legislation – consultation closes on 14 May 2018: Bulletin 7
- Financial Guidance and Claims Act 2018 (provides for the introduction of single financial guidance body – SFGB – to replace Pensions Wise, The Pensions Advisory Service and the Money Advice Service): Bulletin 8
- Data Protection Act 2018 (includes the provisions of the GDPR): Bulletin 8
- The Local Government Pension Scheme (Amendment) Regulations 2018 [SI 2018/493]: Bulletin 8
- The Firefighters' Pension Scheme (Wales) (Amendment) Regulations 2018 [SI 2018/576]: Bulletin 8
- The Firefighters' Pension Schemes and Compensation Scheme (Wales) Amendment) Order 2018 [SI 2018/577]: Bulletin 8
- The Data Protection Act 2018 (Commencement No. 1 and Transitional Saving Provisions) Regulations 2018 [SI 2018/625]: Bulletin 8
- The Police, Fire and Crime Commissioner for Staffordshire (Fire and Rescue Authority) Order 2018 [SI 2018/696]: Bulletin 9
- Certain individual consolidated regulations available on website. Consideration being given to project of retrospective consolidation of FPS 1992 and FPS 2006: Bulletin 10
- The Firefighters' Pension Scheme (Scotland) Amendment Order 2018 [SI 2018/215]: Bulletin 10
- The Firemen's Pension Scheme (Amendment) (Scotland) Order 2018 [SI 2018/216]: Bulletin 10
- The Police and Firefighters' Pensions (Amendment) Regulations 2018 [SI 2018/997]: Bulletin 12
- The Financial Guidance and Claims Act 2018 (Commencement No. 1 and Transitional Provision) Regulations 2018 [SI 2018/987]: Bulletin 12
- The Financial Guidance and Claims Act 2018 (Commencement No.2) Regulations 2018 [SI 2018/1003]: Bulletin 12
- The Occupational Pension Schemes (Cross-border Activities) (Amendment) Regulations 2018 [SI 2018/1102]: Bulletin 13
- The Occupational Pension Schemes (Governance) (Amendment) Regulations 2018 [SI2018/1103]: Bulletin 13

## Local Pension Boards

- Local Pension Board training: Bulletin 1 and Bulletin 1 Appendix 9
- Local Pension Board training: Bulletin 2
- Survey launched 28 November 2017 to test effectiveness and operational efficiency: Bulletin 3
- List of resources for LPBs published on Fire website: Bulletin 3
- Contracting-out reconciliation – Local Pension Board Chairs should ensure exercise is underway: Bulletin 4
- Local Pension Board survey research report: Bulletin 6, and Bulletin 6 Appendix 3
- TPR Governance and Administration 2017 survey results: Bulletin 8
- Training options: Bulletin 8
- Fire and Police Local Pension Board Governance – link to slides: Bulletin 8
- CIPFA Police and Fire Network – Police and Fire Horizon Scanning Briefing: Bulletin 8
- Contracting-out reconciliation update – reminder to Local Pension Boards to submit status information, as requested by HM Treasury, to Bluelight Team: Bulletin 9
- HMRC request regarding tax relief for special members of FPS 2006 – Local Pension Boards should note and seek confirmation that information has been supplied: Bulletin 11
- Template agenda and template annual report: Bulletin 11
- Local Pension Boards should ensure that scheme managers have appropriate process in place to consider IQMP reports: Bulletin 13
- Local Pension Boards should ensure correct action is taken in respect of underpayments and overpayments identified in the contracting-out reconciliation process: Bulletin 13

## Medical appeals

- LGA quick guide to ill-health and injury benefits: Bulletin 4, and Bulletin 4 Appendix 1
- IQMP Guidance – 4 October 2012: Bulletin 4, and Bulletin 4 Appendix 2
- FPSC 9/2010 – Appeals to Board of Medical Referees – Processing of medical appeals: Bulletin 4, and Bulletin 4 Appendix 3

## Membership

- Backdated elections to FPS 2006 (Special Members): Bulletin 3
- Settlement Lump Sum (Special Members): Bulletin 8
- FPS 2006 (Special Members) workshop – link to slides: Bulletin 8

## Pay

- TPO determination (PO-155584) on pensionable pay for a retained firefighter with various allowances – Scheme Advisory Board working with legal advisers to provide guidance on case: Bulletin 6
- Continual Professional Development (CPD) payment – pensionable status: Bulletin 9
- TPO determination on pensionable pay (PO-14863). SAB to progress guidance based on case law and scheme rules. Link to presentation at AGM: Bulletin 13

## Pensions Dashboard

- Pensions Dashboard: Bulletin 2
- Pensions Dashboard Project – newsletter on developments: Bulletin 2, and Bulletin 2 Appendix 4
- Pensions Dashboard development day – slides outlining DWP’s policy objectives and Minister’s speech: Bulletin 4, and Bulletin 4 Appendix 8
- Budget 2018 – Government to provide extra funding. DWP to consult on project later in year: Bulletin 13

## Re-employment

- Re-engagement of Senior Fire Officers Post-Retirement – response to Government Consultation 21 February to 4 April 2017. Response published 27 December 2017: Bulletin 4
- Abatement and re-employment (including Protected Pension Age): Bulletin 5, and Bulletin 5 Appendix 1

## Scheme Advisory Board

- Launch of website: Bulletin 2
- Annual Fire (England) Scheme Advisory Board subscription levy: Bulletin 2, and Bulletin 2 Appendix 2
- Appointment of Weightmans as legal adviser to the Board: Bulletin 8
- Appointment of Aon to conduct benchmarking review: Bulletin 12, and Bulletin 12 Appendix 1
- Board’s Cost Effectiveness Committee meeting with Home Office and GAD to discuss 2016 Valuation draft directions: Bulletin 12

## Special Members – FPS 2006

- National Insurance rebates for Special Members of FPS 2006 (Modified): Bulletin 2
- Backdated elections to FPS 2006 (Special Members): Bulletin 3
- National Insurance rebates for Special Members of FPS 2006 (Modified) – further clarification: Bulletin 3
- Commutation factors – modified members: Bulletin 4
- Rebate of NI for retained modified members: Bulletin 4
- Settlement Lump Sum (Special Members): Bulletin 8
- FPS 2006 (Special Members) workshop – link to slides: Bulletin 8
- Tax relief claims – LGA FAQ factsheet to assist FRAs with response to HMRC request: Bulletin 11
- TPO cases under consideration include individuals who missed deadline to elect for special membership: Bulletin 13



## State Pension and National Insurance (including contracting-out)

- State Pension Age Review: Bulletin 1
- Contracting-out reconciliation: Bulletin 1
- Contracting-out reconciliation: Bulletin 2
- National Insurance rebates for Special Members of FPS 2006 (Modified): Bulletin 2
- Contracting-out reconciliation timeline: Bulletin 3
- National Insurance rebates for Special Members of FPS 2006 (Modified) – further clarification: Bulletin 3
- Contracting-out reconciliation – Local Pension Board Chairs should ensure exercise is underway: Bulletin 4
- Rebate of NI for retained modified members: Bulletin 4
- Indexation of GMP in public service pension schemes – consultation outcome: Bulletin 5, and Bulletin 5 Appendix 4
- Contracting-out reconciliation – Pensions Administration Standards Association (PASA) has produced a GMP trustee checklist, steps to be taken after reconciliation has taken place: Bulletin 5, and Bulletin 5 Appendix 5
- HMRC Pensions Online Digital Service – user research: Bulletin 5
- Contracting-out reconciliation update: Bulletin 6
- Contracting-out reconciliation update: Bulletin 7
- Contracting-out reconciliation update: Bulletin 8
- Contracting-out reconciliation update – reminder to Local Pension Boards to submit status information, as requested by HM Treasury, to Bluelight Team: Bulletin 9
- Contracting-out reconciliation update: Bulletin 10
- Countdown Bulletin 36: Bulletin 11
- Contracting-out reconciliation statistics: Bulletin 12
- Contracting-out reconciliation update – deadline of 31 October 2018 for submitting data: Bulletin 13
- Home Office agreement regarding action in respect of confirmed overpayments and underpayments: Bulletin 13
- Countdown Bulletin 37 and HMRC addendum: Bulletin 13
- PASA Guidance – GMP Stalemate cases: Bulletin 13, and Bulletin 13 Appendix 2

## Survivor Benefits

- Brewster case – nomination forms: Bulletin 1
- Walker v Innospec – membership dates used in assessment of pension for surviving civil partner: Bulletin 1
- Survivor benefits – LGA quick guide: Bulletin 3, and Bulletin 3 Appendix 1
- Spouse's pension on early retirement from FPS 2006 and FPS 2015: Bulletin 7
- Implications of Walker v Innospec Ltd – equality for survivors of civil partnerships and same-sex marriages – HO currently considering recommendations to ministers regarding FPS: Bulletin 7

## Tax

- Unauthorised payments (contributions holiday) – the procedure for each FRA to report and pay tax due: Bulletin 1, and Bulletin 1 Appendices 7 and 8
- Voluntary Scheme Pays: Bulletin 1
- Voluntary Scheme Pays in the Firefighters' Pension Schemes: Bulletin 1, and Bulletin 1 Appendix 5
- Outstanding queries July/August 2017: Bulletin 1, and Bulletin 1 Appendix 6
- Bulk procedure to report and pay tax due on unauthorised payments (contributions holiday) – FRA's individual and SAFE reference numbers: Bulletin 2
- Outstanding queries September/October 2017: Bulletin 2, and Bulletin 2 Appendix 5
- Technical note on correct tax treatment of ill-health pensions paid from the Compensation Scheme to retained firefighters employed before 6 April 2006: Bulletin 2, and Bulletin 2 Appendix 6
- Reminder re tax charge for Voluntary Scheme pays – payment to HMRC by 31 January 2018 for tax charge relating to 2016/2017, and reminder that FRAs should have a VSP policy in place: Bulletin 3
- Lifetime Allowance 2018/2019 to increase in line with CPI by 3% to £1,030,000: Bulletin 3
- Unauthorised payments (contributions holiday) – some FRAs have not yet reported and paid tax to HMRC – deadline reminder: Bulletin 3
- Voluntary Scheme Pays – LGA notes and guidance: Bulletin 4, and Bulletin 4 Appendices 4 - 7
- Unauthorised payments (contributions holiday) – some FRAs have not yet reported and paid tax to HMRC – deadline reminder: Bulletin 3
- Unauthorised payments (contributions holiday) – deadline reminder: Bulletin 4
- Annual Allowance pensions saving statements – data and format: Bulletin 4
- Lifetime Allowance – event reporting: Bulletin 4
- Abatement and re-employment (including Protected Pension Age): Bulletin 5, and Bulletin 5 Appendix 1
- Lifetime Allowance 2018-19: Bulletin 5
- Relief at source – Scotland: Bulletin 5, and Bulletin 5 Appendix 6
- HMRC research into scheme administrators with multiple scheme administrator IDs: Bulletin 6
- Annual Allowance Calculator – temporarily unavailable: Bulletin 7
- Tax awareness seminars – next steps: Bulletin 8 Appendix 1
- HMRC launch of Manage and Register Pension Schemes service: Bulletin 9
- FPS 2006 special member tax relief claims: Bulletin 10
- Annual Allowance Calculator – back on line (link given): Bulletin 10
- Tax relief claims – LGA FAQ factsheet to assist FRAs with response to HMRC request: Bulletin 11
- Method of submission of scheme data re pension savings statements for 2017/2018: Bulletin 11
- Event Report and Lifetime Allowance protections: Bulletin 11
- Reporting non-taxable pension lump sum death benefit payments: Bulletin 13
- Lifetime Allowance 2019/20 – Budget announcement that will increase in line with CPI to £1,055,000: Bulletin 13

## The Pensions Ombudsman

- Pensions Ombudsman Newsletter Issue 2 – 2.9.2017: Bulletin 3, and Bulletin 3 Appendix 2
- Pensions Ombudsman Newsletter Issue 3 – 1.2018: Bulletin 4, and Bulletin 4 Appendix 9
- TPAS dispute function moves to The Pensions Ombudsman – expected to be completed by 1 March 2018: Bulletin 5
- TPO determination (PO-155584) on pensionable pay for a retained firefighter with various allowances – Scheme Advisory Board working with legal advisers to provide guidance on case: Bulletin 6
- Summary of statistics collated by Pensions Ombudsman concerning enquiries and investigations undertaken on behalf of Local Govt., Police, Firefighters and Teachers Pension Schemes: Bulletin 6, and Bulletin 6 Appendix 5
- The Pensions Ombudsman signposting – TPO have launched a signposting template for organisations: Bulletin 7, and Bulletin 7 Appendix 1
- The Pensions Ombudsman News – Issue 4, July 2018: Bulletin 10 Appendix 1
- Link to earlier communications from The Pensions Ombudsman and a full history of determinations in relation to FPS: Bulletin 10
- TPO determination (PO-12763) on transfer out of Police Pension Scheme – authority failed to conduct adequate checks and enquiries: Bulletin 11
- TPO signposting provisions for referring to TPO and The Pensions Advisory Service (TPAS): Bulletin 12
- TPO determination relating to the roles of the Authority and the IQMP: Bulletin 13
- Update on FPS cases currently under consideration by TPO: Bulletin 13

## The Pensions Regulator

- TPR governance and admin survey: Bulletin 1
- Presentation – Firefighters’ pension schemes. Full set of survey results 2016: Bulletin 1, and Bulletin 1 Appendix 3
- Presentation – Firefighters’ pension schemes: Bulletin 1, and Bulletin 1 Appendix 4
- The Pension Regulator’s presentation – “Data challenges in the pensions landscape and GDPR”: Bulletin 2, and Bulletin 2 Appendix 3
- TPR Quick Guides to record keeping, measuring data, improving data: Bulletin 3
- TPR governance and admin survey: Bulletin 3
- TPR statement summarising guidance around the management of outsourced service providers: Bulletin 6, and Bulletin 6 Appendix 4
- TPR Scheme return 2017/18 to be issued in July 2018 – Scheme Advisory Board are working to develop standard set of scheme specific data for use in completing return, in order to ensure consistency across all Firefighters’ Pension Schemes: Bulletin 7
- TPR data score requirements: Bulletin 8
- TPR Governance and Administration 2017 survey results: Bulletin 8
- TPR press release concerning fraudsters who may be trying to steal from the savings of workers by falsely claiming to be from TPR: Bulletin 10
- TPR request that in 2017/2018 scheme return, schemes should measure the data held about members and report this. TPR checklist for completing return. LGA informal guide to measuring data: Bulletin 11, and Bulletin 11 Appendix 1.
- TPR scheme return 2018/2019 issued to scheme managers: Bulletin 12
- TPR new approach to workplace pensions regulation: Bulletin 12
- TPR annual Governance and Administration survey: Bulletin 13

## Transfers

- Transfer calculations to be put on hold pending new GAD factors: Bulletin 13

## Valuation

- Exclusion of valuation data: Bulletin 8
- Home Office not in a position to comment on 2016 valuation until September 2018: Bulletin 11
- HMT draft directions for 2016 Valuation: Bulletin 12
- 2016 Valuation – Home Office/SAB consultation to run up to 5 December 2018. Final decision regarding accrual rate and employer contribution rate to be made at end of consultation: Bulletin 13