

Pension Chat Index by Topic

Contents

Actions	2
Annual Update Statutory Instruments.....	2
Communications	2
Contribution Adjustments	3
Data.....	3
Discretions and decision making.....	3
Abatement	3
Compensation Mechanism	4
Contingent Decisions	4
Events and Invitations.....	4
Governance.....	4
Local Pension Boards	4
Home Office Communications.....	4
Home Office consultation	4
NPCC response to consultation.....	5
Home Office response to consultation	5
Remedy Instructions	5
Legislative remedy position	5
Litigation and Court Cases	6
LGPS remedy	6
Medical Retirements.....	6
Data Request.....	6
Ill-Health.....	6
Regulation 36	6
Police Medical Appeal Board	6
NPPC Police Pensions Team	7
Pension Dashboards.....	7
Public Service Pensions and Judicial Offices Act 2022	7
Closure of legacy schemes from 1 April 2022	7
Compensation	7
Contributions adjustments	7
Member Choice.....	7
Opt-Out	7

Remedy Period.....	8
Remediable Service Statements (RSS).....	8
Rollback.....	8
The Public Service Pensions (Exercise of Powers, Compensation and Information) Directions 2022	8
Remediable Service Statements	8
Remedy Vs Reform.....	9
Rollback.....	9
Transfers In	9
Scheme Manager Steering Group.....	9
Tax.....	9
Annual Allowance Remedy	9
LTA removal	9
Unauthorised payments	9
The Pensions Ombudsman	10
Training	10
Valuation.....	10
Wider public sector policy	10

Actions

- Ensure communication methods reach retired members, check for vulnerable members – [05 June 2024](#) – Slides 10 & 11
- Roles and responsibilities discussion - [15 February 2024](#) – Slides 19 to 23
- Scheme manager checklist - [15 February 2024](#) – Slide 18
- Christmas update and call for action, on data, planning and assessment – [7 December 2023](#)
- Self-assessment and force progress - [22 June 2023](#) – Slide 19
- Remedy Toolkit - [22 June 2023](#) – Slide 18
- Force progress on remedy actions - [25 May 2023](#) – Slide 15
- Force progress on remedy actions – [4 May 2023](#) – Slide 3
- Self-assessment – [14 December 2022](#) – Slide 17
- [24 February 2022](#) – Slide 17 to 18
- Self-assessment – [16 December 2021](#) – Slide 10

Annual Update Statutory Instruments

- Revaluation rate 2023 – [23 February 2023](#) – Slide 3

Communications

- Home Affairs Select Committee update – [5 June 2024](#)
- Updates to website – [5 June 2024](#) – Slide 9
- Communication product plan - [15 February 2024](#) – Slides 15 to 17

- Statutory requirements of scheme manager - [15 February 2024](#) – Slide 13
- IC-RSS design principles - [23 November 2023](#) slide 4 & 5
- IC-RSS design update - [26 October 2023](#) – Slide 14
- Launch of member website – [14 September 2023](#) – Slide 2
- RSS development and quotations after 1 October 2023 - [14 September 2023](#) – Slide 7
- IHR remedy re-assessment and communications to members who are refusing to consent [14 September 2023](#) – Slide 8, 9 &10
- Remedy calculator 2006 members [3 November 2022](#) – Slide 8

Contribution Adjustments

- Contributions adjustments recap and examples - [4 July 2024](#) – Slides 19 to 24
- Contribution adjustment – Policy on interest and repayment recap – [18 April 2024](#) – Slide 6 to 7
- Contribution adjustment tax relief mechanism recap – [28 March 2024](#) – Slides 3 & 4
- Added pension compensatable amounts – [15 February 2024](#) – Slide 11
- Added Pension Compensatory Refunds – [18 January 2024](#)
- GAD calculator FAQs - [26 October 2023](#) – Slides 8 to 12
- GAD calculator published - [14 September 2023](#) – Slide 6
- Home Office consultation - [10 March 2023](#) Slide 10 to 11
- Regulatory Contribution adjustments and GAD calculator - [17 August 2023](#) – Slides 4, 5 & 6
- [26 January 2023](#) – Application of treasury directions on interest – Slides 21 to 29
- [14 December 2022](#) – Slide 4, 6 & 8
- [24 February 2022](#) – Slide 11 & 16
- [16 December 2021](#) – Slide 8

Data

- Outstanding data – [05 June 2024](#) – Slide 12
- SLA, RSS and CD data request update – [28 March 2024](#) – Slides 19 to 23
- Requirement to provide data to meet statutory obligations - [15 February 2024](#) – Slide 14
- Data sharing update from XPS – [26 October 2023](#) – Slide 2
- Remedy Data collection recap and workshop - [25 May 2023](#) – Slides 4 to 11
- Data collection – Data sharing agreement advice from NPCC Data Protection Team – [9 February 2023](#) – Slide 3 to 5
- Remedy data collection – [14 December 2022](#) – Slide 12
- Cohort data – [14 December 2022](#) – Slide 11
- Remedy data collection: Data sharing – [21 July 2022](#) – Slide 10
- Cohort data gathering – [21 July 2022](#) – Slide 11
- Record keeping – [16 December 2021](#) – Slide 9

Discretions and decision making

- Case-law – [15 February 2024](#)– Slide 12

Abatement

- Abatement refresh – [4 July 2024](#) – Slides 2 to 9
- Abatement, retire and return, protected pension age and retirement age guidance refresh – [15 February 2024](#) – Slide 9 & 10

- [22 September 2022](#) Slide 11 to 21

Compensation Mechanism

- Compensation processes - [4 July 2024](#) – Slide 13 to 18
- Compensation mechanism scheme manager and funding guidance – [23 May 2024](#)
- Compensation mechanism update – [14 March 2024](#)
- Compensation scheme principles - [23 November 2023](#) slide 6
- Update - [26 October 2023](#) – Slides 15 to 17
- Guidance update - [14 September 2023](#) – Slide 11
- Home Office consultation - [10 March 2023](#) Slide 9
- Treasury directions [26 January 2023](#) – Slides 15 to 20

Contingent Decisions

- Contingent decisions update and recap - [4 July 2024](#) – Slides 10 to 12
- Contingent decisions update recap – [28 March 2024](#) – Slide 18
- Transfer In – CDs – [28 March 2024](#) – Slides 14 to 15
- Actions for scheme managers on CD data – [15 February 2024](#) – Slides 3 to 5
- Update on CD guidance and Honoraria and Transfers – [18 January 2024](#) – Slide 9
- Summary of progress [26 October 2023](#) – Slide 18
- Summary of contingent decision guidance – [12 October 2023](#)
- Guidance update - [14 September 2023](#) – Slide 11
- Contingent decisions - [17 August 2023](#) – Slide 9 to 13
- Home Office consultation - [10 March 2023](#) – Slide 12 to 18
- [1 December 2022](#) – Slide 14 to 16
- [21 April 2022](#) – Slides 3 to 4

Events and Invitations

- Police and Fire Data Conference - Write up and slides [25 May 2023](#) – Slide 3
- Conference invite – Police and Fire Pension Scheme Conference: What does our data tell us - [10 March 2023](#) – slide 21
- CIPFA AFEP – Pension Tax [10 March 2023](#) – slide 22
- Conference invite – Police and Fire Pension Scheme Conference: What does our data tell us. [23 February 2023](#) - Slide 5

Governance

- TPR General Code – [19 June 2024](#)

Local Pension Boards

- Reporting to local pension boards – [28 March 2024](#) – slides 23 to 24

Home Office Communications

Home Office consultation

- Added Pension - [10 March 2023](#) Slide 9 and 16
- Compensation - [10 March 2023](#) Slide 9

- Consultation - [10 March 2023](#) Slide 8
- Contingent decisions - [10 March 2023](#) Slide 12 to 18
- Contribution adjustments - [10 March 2023](#) Slide 10 to 11
- Transfer In consultation - [10 March 2023](#) Slide 9 and 17

NPCC response to consultation

- Consultation questions – [4 May 2023](#) Slide 4 to 13
- Home Office consultation - [20 April 2023](#) Slide 11 to 17

Home Office response to consultation

- Highlights of response – [27 July 2023](#) Slide 4
- Responses - [27 July 2023](#) Slide 5 to 13
- Equalities - [27 July 2023](#) Slide 14
- Form and manner - [27 July 2023](#) Slide 15

Remedy Instructions

- Home Office remedy guidance recap - [25 May 2023](#) – Slides 13 to 14
- Home Office consultation - [10 March 2023](#)
- [26 January 2023](#), New instructions for bereavement and tax published – Slides 3 to 7
- [11 January 2023](#), Home Office remedy timeline
- [1 December 2022](#), CETVs, Divorce and Contingent decisions – Slides 13 to 16
- [3 November 2022](#) – Slides 11 to 14
- [20 October 2022](#) Slide 14
- [6 October 2022](#) – Slide 4
- [22 September 2022](#) Slide 4
- [8 September 2022](#) – Slide 8
- [11 August 2022](#) – Slide 4
- [21 April 2022](#) – Slide 2

Legislative remedy position

- A review of all relevant legislation and guidance published in 2023 [20 December 2023](#) – Slide 3
- [14 September 2023](#) – Slide 3 – Final position
- [17 August 2023](#) – Slide 2
- [27 July 2023](#) Slide 2
- [22 June 2023](#) – Slide 2
- [25 May 2023](#) – Slide 2
- [4 May 2023](#) – Slide 2
- [20 April 2023](#) – Slide 2
- [10 March 2023](#) – Slide 2
- [23 February 2023](#) – Slide 2
- [9 February 2023](#) – Slide 2
- [26 January 2023](#) – Slide 2
- [11 January 2023](#) – Slide 2

- [14 December 2022](#) – Slide 3
- [1 December 2022](#) – Slide 2 & 3
- [18 November](#) – Slide 3 & 4
- [3 November 2022](#) – Slide 9 & 10
- [20 October 2022](#) – Slide 11 & 12
- [6 October 2022](#) – Slide 2 & 3
- [22 September 2022](#) Slide 2 & 3
- [8 September 2022](#) – Slide 6 & 7
- [11 August 2022](#) – Slide 2 & 3
- [21 July 2022](#) Slide 2 & 3
- [27 May 2022](#) Slides 2
- [24 February 2022](#) – Slide 2 to 4
- [13 January 2022](#) – Slide 2 to 3
- [16 December 2021](#) Slide 3 to 5

Litigation and Court Cases

- PSA JR dismissed [16 December 2021](#) Slide 2

LGPS remedy

- [3 November 2022](#) – Slide 20

Medical Retirements

Data Request

- Medical Retirements Data Request Feedback – [20 October 2022](#) Slides 2 to 10
- Medical Retirements Data Request [6 October 2022](#) – Slide 14
- Medical Retirements Data Request [8 September 2022](#) – Slide 13

Ill-Health

- Remedy for Ill-health retired pensioners – [4 January 2024](#)
- Remedy for members who retired on Ill-Health during the remedy - [17 August 2023](#) – Slide 14 to 18
- Consent and deceased IHR pensioners - [22 June 2023](#) – Slide 15 - 16
- Ill-Health recap – [9 February 2023](#) – Slide 9 to 17
- [14 December 2022](#) – Slide 13 & 14
- [3 November 2022](#) – Slide 16 to 19
- [20 October 2022](#) Slides 15 to 20
- [6 October 2022](#) – Slides 5 to 13
- [21 July 2022](#) – Slide 13 & 14
- [27 May 2022](#) – Slide 6 to 14
- [26 January 2022](#) – Medical Retirement Session

Regulation 36

- Home Office advice to stop medicals under regulation 36 – [9 February 2023](#) – Slide 8
- Medical examination on opt-in – [21 April 2022](#) Slide 6

Police Medical Appeal Board

- PMAB guidance withdrawn – [8 September 2022](#) – Slide 14

NPPC Police Pensions Team

- Role of NPCC – [5 June 2024](#) – Slide 3 and 8
- NPCC team update – [20 December 2023](#) – Slide 6 & 7
- NPCC Team work – [20 April 2023](#) – Slide 5
- Pensions Future work – [9 February 2023](#) Slide 6 to 7
- [13 January 2022](#) – Slide 10 to 12

Pension Dashboards

- Staging guidance being consulted on for 30 September 2025 – [23 November 2023](#) Slide 2 & 3
- TPR ‘Preparing for pension dashboards’ Angela Bell – [29 September 2023](#)
- Connection deadline confirmed as 31 October 2026 & Dashboard FAQs - [22 June 2023](#) Slide 4 to 10
- Draft Regulations laid – [20 October 2022](#) Slide 13
- DWP dashboard response and DAP consultation – [8 September 2022](#) Slide 15 to 16
- NPCC response to PDP standards consultation – [8 September 2022](#) Slide 17
- DWP Dashboard response – [21 July 2022](#) Slide 4 to 5
- PDP Standards Consultation - [21 July 2022](#) Slide 6
- Pension Dashboard session with heywood [10 February 2022](#)

Public Service Pensions and Judicial Offices Act 2022

Closure of legacy schemes from 1 April 2022

- Prospective remedy and transition members - [24 February 2022](#) – Slide 5 to 10
- [13 January 2022](#) – Slide 4 & 5
- Home Office prospective regulations consultation – [16 December 2021](#) – Slide 7 and 11 to 16

Compensation

- Home Office consultation - [10 March 2023](#) – Slide 9
- Treasury directions [26 January 2023](#) – Slides 15 to 20

Contributions adjustments

- Regulatory Contribution adjustments and GAD calculator - [17 August 2023](#) – Slides 4, 5 & 6
- Home Office consultation - [10 March 2023](#) – Slide 10 to 11
- [26 January 2023](#) – Application of treasury directions on interest – Slides 21 to 29
- [14 December 2022](#) – Slide 4, 6 & 8
- [24 February 2022](#) – Slide 11 & 16
- [16 December 2021](#) – Slide 8

Member Choice

- Immediate choice and deferred choice members – [11 August 2022](#) Slide 5
- Immediate Choice and Deferred Choice members – [21 July 2022](#) Slide 7
- Immediate Choice and Deferred Choice – [24 February 2022](#) - slide 11, 12, 14 & 15

Opt-Out

- Contingent decision – Opt-Out Home Office consultation - [10 March 2023](#) – Slide 13 to 14
- Retrospective option to opt back in for remedy period service – [21 April 2022](#) – Slide 5

Remedy Period

- [14 December 2022](#) – Slide 4
- [24 February 2022](#) – Slide 11

Remediable Service Statements (RSS)

- Providing quotes and estimates - [17 August 2023](#) – Slide 7 & 8
- Communications and timeframes - [22 June 2023](#) – Slide 17
- Treasury directions [26 January 2023](#) – Slide 30 & 31
- Timetabling – [14 December 2022](#) – Slide 15
- 18 month timetable [29 November 2022](#)
- 18 month remedy timetable – Cohort assessment – [18 November 2022](#) – Slides 5 to 21
- 18 month timetable [3 November 2022](#) – Slide 15
- Types of RSS – [11 August 2022](#) Slide 6
- Types of RSS – [21 July 2022](#) – Slide 8 & 9
- [24 February 2022](#) – Slide 12

Rollback

- Rollback into legacy scheme – [14 December 2022](#) – Slide 4 & 5
- Rollback of transfers in during the remedy period – [21 April 2022](#) Slide 7
- Rollback - [24 February 2022](#) – Slide 11

The Public Service Pensions (Exercise of Powers, Compensation and Information) Directions 2022

- [29 February 2024](#) – HMRC newsletter 156 tax effect of interest paid under Treasury Directions
- [26 January 2023](#) – Pension chat slides on treasury directions. Slides 8 to 31
- [Treasury directions](#) made on 14 December 2022 came into force on 19 December 2022 – [11 January 2023](#) – slide 2

Remediable Service Statements

- IC-RSS rollout and delay update on unauthorised payments – [05 June 2024](#) – Slide 5 & 6
- ABS-RSS Update – [25 April 2024](#)
- IC-RSS delivery progress and tax on interest – [18 April 2024](#) – Slides 2 to 4
- IC-RSS delivery progress – [28 March 2024](#) – Slide 5
- IC-RSS design principles - [23 November 2023](#) slide 4 & 5
- IC-RSS design update - [26 October 2023](#) – Slide 14
- RSS development and quotations after 1 October 2023 - [14 September 2023](#) – Slide 7
- Providing quotes and estimates - [17 August 2023](#) – Slide 7 & 8
- Communications and timeframes - [22 June 2023](#) – Slide 17
- Treasury directions [26 January 2023](#) – Slide 30 & 31
- Timetabling – [14 December 2022](#) – Slide 15
- 18 month timetable [29 November 2022](#)
- 18 month remedy timetable – Cohort assessment – [18 November 2022](#) – Slides 5 to 21
- 18 month timetable [3 November 2022](#) – Slide 15

- Types of RSS – [11 August 2022](#) Slide 6
- Types of RSS – [21 July 2022](#) – Slide 8 & 9
- [24 February 2022](#) – Slide 12

Remedy Vs Reform

- [3 November 2022](#) – Slide 7

Rollback

Transfers In

- Remediable transfers in – [28 March 2024](#) – slides 16 & 17

Scheme Manager Steering Group

- [8 September 2022](#) – Slide 9

Tax

Annual Allowance Remedy

- HMRC digital service – [18 April 2024](#) – Slide 8
- Annual allowance recap - [28 March 2024](#)
 - Regulations and guidance – slides 7 to 10
 - Template notional remediable pension savings statement (NR-PSS) – slides 11 to 12
 - FAQs – slide 13
- [26 October 2023](#) – Slides 3 to 7
- 14 September 2023 [HMRC member journey](#)
- Pension tax processes and HMRC update - [14 September 2023](#) – Slide 4 & 5
- Tax consultation (No.2) New format for tax charges arising in tax years 2019/2020 to 2022/2023 - [22 June 2023](#) – Slides 11 to 14
- [23 March 2023](#) – Remedy recap – Slide 3 to 5
- [Tax regulations](#) published – [9 February 2023](#) – Slide 2
- Tax consultation – [14 December 2022](#) – Slide 9
- Rectification of unlawful discrimination – [Tax regulations consultation](#) – [1 December 2022](#), slide 5 to 12
- HMT Remedy Tax Policy - Pension Chat [22 September 2022](#) - Slide 5 to 10

LTA removal

- Changes to the lifetime allowance – training session by KPMG – [9 May 2024](#)
- 2023 Budget announcement - [23 March 2023](#) – Slide 6 to 19

Unauthorised payments

- Scheme Sanction Charge Refunds – [18 April 2024](#) – Slide 5
- HMRC newsletter 156 – [29 February 2024](#)
- Scheme Sanction Charge advice reminder – [15 February 2024](#) – Slide 6 to 8
- Tax charges on lump sums after budget changes FAQs [20 April 2023](#) – Slide 3 to 4
- Scheme Sanction Charge [1 December 2022](#) – Slide 17
- Unauthorised payment description [21 April 2022](#) – Slide 9 to 13

- Scheme Sanction Charge – Slide 14 [21 April 2022](#)

The Pensions Ombudsman

- Introduction to TPO [11 January 2023](#)

Training

- CIPFA – AFEP Training [20 October 2022](#) Slide 21
- CIPFA – AFEP Training [6 October 2022](#) Slide 15

Valuation

- 2020 valuation results update – [20 December 2023](#) - Slide 4 & 5
- 2016 and 2020 valuation recap – [26 January 2023](#) – Slide 32 & 33
- 2016 unpaused valuation – final result [published 7 April 2022](#) – [27 May 2022](#) Slides 3 to 5
- 2016 and 2020 valuation update – [13 January 2022](#) – Slide 6 to 8

Wider public sector policy

- Reflections of shared public sector scheme challenges - [23 November 2023](#) slide 7 & 8
- Revaluation date changes – [23 February 2023](#) – Slide 4