

**Action Points from Bulletin 186 (published 1 July 2019)**

Bulletin points	Action to be taken by Capita	Timescale to complete action	Action to be taken by Barnet administering authority	Timescale to complete action	Action to be taken by the Barnet's Scheme employers	Timescale to complete action
<p><b>New GAD factors – effective from 21 June 2019</b></p> <p>MHCLG have issued a revised version of the actuarial factors spreadsheet, to include the following <b>new</b> factors:</p> <ul style="list-style-type: none"> <li>• Annual allowance ‘Scheme Pays’ (a single age-related factor, relevant to the member’s NPA, is now used – it’s no longer necessary to ‘convert’ the factor)</li> <li>• Inverse commutation (commuting lump sum into pension – applicable to certain members who opted out of HMRC’s tax changes in 2006)</li> <li>• Converting AVCs into LGPS pension</li> </ul> <p>These factors <b>take effect from 21 June 2019</b>.</p> <p><b>Converting AVCs into LGPS pension – transitional arrangements for using earlier</b></p> <p>The <b>earlier</b> factors may be used, where:</p> <ul style="list-style-type: none"> <li>• The member has already been provided with a formal retirement quotation ; and</li> <li>• That quotation includes an estimate of the added pension they would receive if they used their AVC to buy additional pension in the LGPS; and</li> <li>• It would be beneficial to the member if the old factors were used.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Technical</b> – update existing technical guidance/factors</li> <li>• <b>Operations</b> – please take note, pending update of Capita’s internal technical manuals</li> </ul>	<ul style="list-style-type: none"> <li>• 31 August 2019</li> <li>• Immediately</li> </ul>	<ul style="list-style-type: none"> <li>• For information</li> </ul>	<ul style="list-style-type: none"> <li>• N/A</li> </ul>		

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<p><b>Late retirement guidance – new guidance to be issued with effect from 1 September 2019</b></p> <p>Following the consultation on the proposed changes to the late retirement factors and methodology, MHCLG have confirmed that the methodology has been simplified and will be issued shortly, with an effective date of 1 September 2019.</p> <p><i>Addendum – the late retirement guidance issued on 1 July 2019, after LGA Bulletin 186 was published.</i></p>	<ul style="list-style-type: none"> <li>• <b>Technical</b> – update existing technical guidance/factors</li> <li>• <b>Operations</b> – please take note, pending update of Capita's internal technical manuals</li> </ul>	<ul style="list-style-type: none"> <li>• 31 August 2019</li> <li>• Immediately</li> </ul>	<ul style="list-style-type: none"> <li>• You may wish to cover this in the next member newsletter. NB there isn't a requirement under the Disclosure Regulations to notify members of this change</li> </ul>	<ul style="list-style-type: none"> <li>• Before the next newsletter is published</li> </ul>		
<p><b>Updated ill health certificates issues</b></p> <p>LGPC have issued revised ill health certificates to correct/amend a number of minor points.</p>	<ul style="list-style-type: none"> <li>• <b>Technical</b> – update certificates contained within the Procedure manual</li> </ul>	<ul style="list-style-type: none"> <li>• completed</li> </ul>	<ul style="list-style-type: none"> <li>• For information</li> </ul>	<ul style="list-style-type: none"> <li>• N/A</li> </ul>	<ul style="list-style-type: none"> <li>• For information</li> </ul>	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
<p><b>Supplementary ('second bite') PI guide issued</b></p> <p>The guide, which doesn't contain new information, but is a consolidation of existing guidance on how/when Supplementary PI is applied to lump sums, is available to view on the <a href="#">LGPC website</a>.</p> <p><i>Capita's technical team – we've already prepared a 'Public Sector Pensions Increase – quick guide' on Capita's intranet that covers Supplementary PI</i></p>	<ul style="list-style-type: none"> <li>• <b>Technical</b> – Review the new guidance to see whether any changes are required to our existing internal guidance (see left)</li> </ul>	<ul style="list-style-type: none"> <li>• completed</li> </ul>	<ul style="list-style-type: none"> <li>• For information</li> </ul>	<ul style="list-style-type: none"> <li>• N/A</li> </ul>		
<p><b>Employees' full guide &amp; HR/payroll guides updated</b></p> <p>These guides have been updated and are available to view on the <a href="#">LGPC website</a>.</p> <p><i>Capita's technical team – we've recently updated the Procedure manual, taking into account the 'old' HR &amp; payroll guides, and updating them for 2019; therefore, the latest Procedure manual contains the latest information for HR &amp; payroll.</i></p>	<ul style="list-style-type: none"> <li>• <b>Technical &amp; Engagement</b> – update the full member guide to accommodate the new changes.</li> </ul>	<ul style="list-style-type: none"> <li>• 31 August 2019</li> </ul>	<ul style="list-style-type: none"> <li>• For information</li> </ul>	<ul style="list-style-type: none"> <li>• N/A</li> </ul>	<ul style="list-style-type: none"> <li>• Please refer to the latest procedure manual</li> </ul>	<ul style="list-style-type: none"> <li>• As &amp; when</li> </ul>

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<p><b>Exit payment cap consultation – LGPC guidance published</b></p> <p>The LGPC have published their <a href="#">response</a> to the <a href="#">consultation on the Exit Payment Regulations</a>, which finished on 3 July 2019.</p>	<ul style="list-style-type: none"> <li>For information</li> </ul>	<ul style="list-style-type: none"> <li>N/A</li> </ul>	<ul style="list-style-type: none"> <li>For information</li> </ul>	<ul style="list-style-type: none"> <li>N/A</li> </ul>	<ul style="list-style-type: none"> <li>For information</li> </ul>	<ul style="list-style-type: none"> <li>N/A</li> </ul>
<p><b>HMRC pension schemes newsletters 110 &amp; 111</b></p> <p>HMRC's <a href="#">Pension schemes newsletters 110 &amp; 111</a> have been published; <b>one article of particular interest concerns the reporting of pension tax charges on the SA100 tax return in <a href="#">newsletter 111</a>.</b></p>	<ul style="list-style-type: none"> <li><b>Operations</b> – please ensure that the relevant person who completes the Event reports reads the article on reporting pensions tax charges</li> </ul>	<ul style="list-style-type: none"> <li>Immediately</li> </ul>	<ul style="list-style-type: none"> <li>For information</li> </ul>	<ul style="list-style-type: none"> <li>N/A</li> </ul>		
<p><b>Age discrimination in public service pension schemes ('McCloud' case) – Government's leave to appeal denied</b></p> <p>Following the Supreme Court's ruling* in favour of the Fire &amp; Judicial pension schemes, the Government sought leave to appeal against the ruling . This request for leave to appeal has been <b>denied</b>, which means that the Court of Appeal's decision is upheld and the case will be returned to an employment tribunal for an appropriate remedy to be determined.</p> <p><b>The Scheme Advisory Board (SAB) for the LGPS have published a <a href="#">Q &amp; A</a> on their website, outlining the potential consequences of the Supreme Court's ruling.</b></p> <p><b>A <a href="#">written ministerial</a> has also been posted by Elizabeth Truss on 15 July 2019.</b></p> <p><i>Capita's technical team – whilst we can't be sure on what changes (if any) will be made to the LGPS, our</i></p>	<ul style="list-style-type: none"> <li><b>Operations</b> – if a scheme member calls to query the ruling you can only advise that until the Employment Tribunal has made a ruling about the remedy, we do not know how the provisions of the LGPS will be affected</li> </ul>	<ul style="list-style-type: none"> <li>Immediately</li> </ul>	<ul style="list-style-type: none"> <li>Given the detailed nature and numerous Q &amp; A points contained within the SAB's Q &amp; A document, it's highly recommended that you read it</li> </ul>	<ul style="list-style-type: none"> <li>As &amp; when</li> </ul>	<ul style="list-style-type: none"> <li>If an employee calls to query the ruling, you can only advise that, until the Employment Tribunal has made a ruling about the remedy, we don't know how the provisions of the LGPS will be affected</li> </ul>	<ul style="list-style-type: none"> <li>Immediately</li> </ul>

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<p><i>view is that, for the LGPS:</i></p> <ul style="list-style-type: none"> <li><i>Any redress, if made, will need to be backdated to 1 April 2014 and will result in a levelling up of benefits.</i></li> <li><i>Whilst the 'underpin' was a protection provided for members within 10 years of their NPA on 1 April 2012, a number of other criteria had to be met; therefore, we could see the 'underpin' being extended to members who, apart from the age requirement, would've met the rest of the 'underpin' criteria.</i></li> </ul> <p><i>Please note that the above points are purely conjecture and an alternate remedy could be selected.</i></p> <p><i>*the Court ruled that the transitional arrangements applying to the fire &amp; judicial pension schemes, and, by extension, all public service pension schemes beyond 1 April 2014/15, are discriminatory.</i></p>						
<p><b>NI database – terms of use extended</b></p> <p>The restrictions for accessing the NI database (where users can see whether a member has LGPS rights across other LGPS funds) have been extended. It's worth noting that the number of admin users (with 'view only' accessibility) for each LGPS fund has <b>increased</b> from 5 to 15.</p>	<ul style="list-style-type: none"> <li><b>Operations</b> – given that the number of permitted admin users has increased, you may wish to consider giving access to certain members of staff</li> </ul>	<ul style="list-style-type: none"> <li>ASAP</li> </ul>	<ul style="list-style-type: none"> <li>For information</li> </ul>	<ul style="list-style-type: none"> <li>N/A</li> </ul>		

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<p><b>Updated Data Sharing Agreement required</b></p> <p>Access to the NI database (noted above) is dependent on the data controller completing the revised Data Sharing Agreement. <b>Therefore, it's essential that the latest agreement is completed (copies of which can be obtained from, &amp; returned to <a href="mailto:Lorraine.Bennett@local.gov.uk">Lorraine.Bennett@local.gov.uk</a> by 31 July 2019.</b></p>	<ul style="list-style-type: none"> <li><b>Operations</b> – please ensure that your client, the data controller, has completed the new data sharing agreement</li> </ul>	<ul style="list-style-type: none"> <li>31 July 2019</li> </ul>	<ul style="list-style-type: none"> <li>if you haven't already done so, please obtain, complete and return a copy of the updated agreement to <a href="mailto:Lorraine.Bennett@local.gov.uk">Lorraine.Bennett@local.gov.uk</a></li> </ul>	<ul style="list-style-type: none"> <li>31 July 2019</li> </ul>		
<p><b>LGPS National Framework – June news bulletin published</b></p> <p>The bulletin can be found <a href="#">here</a>.</p>			<ul style="list-style-type: none"> <li>For information</li> </ul>	<ul style="list-style-type: none"> <li>N/A</li> </ul>		
<p><b>GAD newsletter – June edition published</b></p> <p>The newsletter can be found <a href="#">here</a>.</p> <p>One interesting article of note referred to the High Court case of Ms Harvey vs. Haringey LBC. Ms Harvey was the unmarried cohabiting partner of a deceased member of the 1997 Scheme and the Court ruled in October 2018 that Ms Harvey <b>wasn't</b> entitled to a survivor's pension, as the 1997 Scheme did not cater for unmarried partners to receive a survivor's pension. Although the ruling was made last year, <b>Ms Harvey has now decided not to appeal the decision.</b></p>	<ul style="list-style-type: none"> <li><b>Operations</b> – please note that the stance on cohabiting partner's pensions has not changed (i.e. a survivor's pension is only payable if the deceased member stopped contributing to LGPS after 31 March 2008)</li> </ul>	<ul style="list-style-type: none"> <li>Immediately</li> </ul>	<ul style="list-style-type: none"> <li>For information</li> </ul>	<ul style="list-style-type: none"> <li>N/A</li> </ul>		
<p><b>Technical Group minutes published</b></p> <p>The latest Technical Group minutes, taken from their meeting of 14 June 2019, can be found <a href="#">here</a>.</p>			<ul style="list-style-type: none"> <li>For information</li> </ul>	<ul style="list-style-type: none"> <li>N/A</li> </ul>		

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<p><b>PASA cyber security guidance published</b></p> <p>The guidance can be found <a href="#">here</a>.</p>	<ul style="list-style-type: none"> <li>• <b>Operations</b> – for information</li> </ul>	<ul style="list-style-type: none"> <li>• N/A</li> </ul>	<ul style="list-style-type: none"> <li>• You may wish to refer, and recommend, the guidance to your pensions committee and local pension board</li> </ul>	<ul style="list-style-type: none"> <li>• As &amp; when</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Operations</b> – for information</li> </ul>	<ul style="list-style-type: none"> <li>• N/A</li> </ul>
<p><b>PSIG publish cyber security guidance for pensions schemes</b></p> <p>The Pensions Scams Industry Group (PSIG) have published their latest <a href="#">guidance</a> on combatting pensions scams.</p>	<ul style="list-style-type: none"> <li>• <b>Operations</b> – for information</li> </ul>	<ul style="list-style-type: none"> <li>• N/A</li> </ul>	<ul style="list-style-type: none"> <li>• You may wish to refer, and recommend, the guidance to your pensions committee and local pension board</li> </ul>	<ul style="list-style-type: none"> <li>• As &amp; when</li> </ul>		
<p><b>LGPC Fundamentals training</b></p> <p><a href="#">Circular 314</a> provides details on the LGPS 'fundamentals' courses being delivered between October and December 2019. The courses, which are made up of three, one-day events between October and December 2019, are aimed at pension committees and local pension boards.</p>	<ul style="list-style-type: none"> <li>• <b>Operations</b> – please contact <a href="mailto:technicalgps@capita.co.uk">technicalgps@capita.co.uk</a> for any technical training needs you have</li> </ul>	<ul style="list-style-type: none"> <li>• As &amp; when</li> </ul>	<ul style="list-style-type: none"> <li>• If you, or members of your pension committee or local pension board, may wish to consider attending one of the LGPC's training sessions, or, alternatively, ask Capita's LGPS Technical Consultancy team to provide tailored training; if you would like to consider the latter option, please contact <a href="mailto:technicalgps@capita.co.uk">technicalgps@capita.co.uk</a></li> </ul>	<ul style="list-style-type: none"> <li>• As &amp; when</li> </ul>	<ul style="list-style-type: none"> <li>• Please liaise with <a href="mailto:nigel.keogh@barnet.gov.uk">nigel.keogh@barnet.gov.uk</a> for any pensions training needs you may have</li> </ul>	<ul style="list-style-type: none"> <li>• As &amp; when</li> </ul>

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