

## SCHEDULES

### SCHEDULE 1

#### Amendments to the 2015 Scheme

7. Schedule 2 (transitional provisions) is amended as follows—
- (a) in Part 1, in paragraph 3(2) for “Subject to paragraph (3)” substitute “Subject to paragraphs (3) and (4)” and after sub-paragraph (3) insert—
    - “(4) In the case of a tapered protection member of the NFPS who is a special member of the NFPS, the tapered protection closing date is the date found by applying the relevant date in column 3 of the FPS table in Part 4 of this Schedule to the birthday referred to in column 1 and column 2.”;
  - (b) in Part 2, in paragraph 9, after sub-paragraph (2) insert—
    - “(2A) Where P was a full protection member of the FPS and after retiring from pensionable service in this scheme became entitled to a continuous service pension under article 13A, or an ordinary pension under article 13 or a short service award under article 14 of that scheme or a continued pension under article 14A, P ceases to be eligible to be a full protection member of the NFPS.”;
  - (c) in Part 3, in paragraph 15, after sub-paragraph (1) insert—
    - “(1A) Where P was a full protection member of the FPS and after retiring from pensionable service in this scheme, became entitled to a continuous service pension under article 13A, or an ordinary pension under article 13 or a short service award under article 14 or a continued pension under article 14A of that scheme, P ceases to be eligible to be a tapered protection member of the NFPS.”;
  - (d) after Part 3, insert—

### “PART 3A

#### Payment of ill-health benefits to transition members

##### **Transition member who has not reached normal pension age under the NFPS**

22.—(1) This paragraph applies in relation to a transition member with continuity of service who—

- (a) is a connected member of the NFPS or a connected special member of the NFPS;
  - (b) becomes entitled to an ill-health award under this scheme in relation to relevant scheme employment; and
  - (c) who has not reached normal pension age under the NFPS.
- (2) If this paragraph applies—
- (a) neither a lower tier ill-health pension nor a higher tier ill-health pension are payable under article 12 (award on ill-health retirement) of the NFPS; and

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- (b) an ill-health award is payable under this scheme in accordance with this paragraph.
- (3) If the member meets the conditions only for a lower tier ill-health pension under this scheme the annual rate of a lower tier ill-health pension payable under this scheme is the sum of—
  - (a) the annual rate of a lower tier ill-health pension payable under this scheme; and
  - (b) an amount payable under regulation 73(4) (entitlement to lower tier ill-health pension and to higher tier ill-health pension).
- (4) Where the member meets the conditions for a higher tier ill-health pension under this scheme, the adjusted lower tier ill-health pension in regulation 74(4) (annual rate of ill-health awards) includes the amount in sub-paragraph (3)(b) for the purposes of the calculation of the annual rate of the higher tier ill-health pension.
- (5) If, after an ill-health award becomes payable under this scheme, a transfer value payment is made under Chapter 2 (transfers out of the Scheme) of Part 12 (transfers into and out of the Scheme) of the NFPS in respect of the member's rights under that Scheme and the transfer relates to a period of service included as qualifying service in relation to the member's retirement account, the scheme manager must deduct from the ill-health award the amount in respect of service in the NFPS which is equal to the value represented by that transfer value payment.
- (6) In this paragraph—

“relevant scheme employment” means the continuous period of pensionable service in scheme employment in relation to the active member's account to which the qualifying service for that connected member of the NFPS, or connected special member of the NFPS, was added for the purposes of regulation 66 (qualifying service).

#### **Transition member who reaches normal pension age under the NFPS**

- 23.—(1) This paragraph applies in relation to a transition member with continuity of service who is receiving payment of an ill-health award in accordance with paragraph 22.
- (2) When the member reaches normal pension age under the NFPS—
    - (a) the equivalent amount to the NFPS lower tier ill-health pension specified under regulation 68(2)(ba) (annual rate of retirement pension (active members)) ceases to be payable under this scheme; and
    - (b) the member becomes entitled under the NFPS to the immediate payment of a continued pension of a sum equal to the annual rate of the equivalent amount to the NFPS lower tier ill-health pension payable immediately the day before the member reaches normal pension age.

#### **Transition member who has not reached normal pension age under the FPS**

- 24.—(1) This paragraph applies in relation to a transition member who—
- (a) was in pensionable service in the FPS until the day before the transition date; and
  - (b) has continued in pensionable service in relevant scheme employment, or has been treated as an active member of this scheme in relation to that employment, until that member became entitled to an ill-health award under this scheme; and

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- (c) has not reached normal pension age under the FPS or the age at which the conditions of article 13 (ordinary pension) as modified by article 13A (continuous service pension) of that Scheme are satisfied.
- (2) If this paragraph applies—
  - (a) neither a lower tier ill-health pension nor a higher tier ill-health pension are payable under article 15 (ill health award) of the FPS; and
  - (b) an ill-health award is payable from this scheme.
- (3) If the member meets the conditions only for a lower tier ill-health pension under this scheme, the annual rate of a lower tier ill-health pension payable under this scheme is the sum of—
  - (a) the annual rate of a lower tier ill-health pension payable under this scheme; and
  - (b) an amount payable under regulation 73(4) (entitlement to lower tier ill-health pension and to higher tier ill-health pension).
- (4) If the member meets the conditions for a higher tier ill-health pension under this scheme, the adjusted lower tier ill-health pension in regulation 74(4) (annual rate of ill-health awards) includes the amount in sub-paragraph (3)(b) for the purposes of the calculation of the annual rate of the higher tier ill-health pension.
- (5) If, after an ill-health award becomes payable under this scheme, a transfer value payment is made under article 55 (payment of transfer value) of the FPS in respect of the member's rights under that Scheme and the transfer relates to a period of service included as qualifying service in relation to the member's retirement account, the scheme manager must deduct from the amount of the ill-health award an amount in respect of service in the FPS which is equal to the value represented by that transfer value payment.
- (6) In this paragraph—

“relevant scheme employment” means the continuous period of pensionable service in scheme employment in relation to the active member's account to which the pensionable service in the FPS was added for the purposes of regulation 66 (qualifying service).

#### **Transition member who reaches normal pension age under the FPS**

- 25.—(1) This paragraph applies in relation to a transition member who is receiving the payment of an ill-health award in accordance with paragraph 24.
- (2) When the member reaches normal pension age under the FPS or the age for retirement ascertained under article 13A(3)(a) of that Scheme—
    - (a) the member ceases to be entitled to the immediate payment of the equivalent amount to the FPS lower tier ill-health pension under regulation 73(4)(b) (entitlement to lower tier ill-health pension and higher tier ill-health pension) under this scheme; and
    - (b) the member becomes entitled under the FPS to the immediate payment of a continued pension of a sum equal to the annual rate of the equivalent amount of the FPS lower tier ill-health pension payable immediately before the date on which the member reaches normal pension age or the age for retirement ascertained under article 13A(3)(a) of the FPS.

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## PART 3B

### Payment of death benefits in respect of transition members

#### **Annual rate of pensions for surviving partners payable under this scheme when certain transition members die in service with accrued benefits in the FPS**

- 26.—(1) This paragraph applies in relation to a transition member who—
- (a) was in pensionable service in the FPS until the day before the transition date;
  - (b) has continued in pensionable service in scheme employment, or to be treated as an active member of this scheme, until that member dies; and
  - (c) dies as an active member of this scheme.
- (2) Awards for surviving spouses and civil partners are not payable under Part C (awards on death – spouses or civil partners) of the FPS in respect of a member to whom this paragraph applies.
- (3) A surviving spouse or civil partner of a member to whom this paragraph applies is not entitled to receive a bereavement pension under article 43(1) of the FPS.

#### **Annual rate of pensions payable to an eligible child under this scheme when a transition member dies in service with accrued benefits in the NFPS**

- 27.—(1) This paragraph applies in relation to a transition member with continuity of service who is a connected member of the NFPS or a connected special member of the NFPS—
- (a) who dies as an active member of this scheme; and
  - (b) whose period of qualifying service is at least 3 months.
- (2) Pensions for an eligible child are not payable under the NFPS in respect of that member.

#### **Annual rate of pensions payable to an eligible child under this scheme when a transition member dies in service with accrued benefits in the FPS**

- 28.—(1) This paragraph applies in relation to a transition member who—
- (a) was in pensionable service in the FPS until the day before the transition date;
  - (b) has continued in pensionable service in scheme employment, or has been treated as an active member of this scheme, until that member dies; and
  - (c) dies as an active member of this scheme.
- (2) Awards for an eligible child are not payable under Part D (awards on death – children) and a bereavement pension is not payable under article 43A(2) of the FPS in respect of that member.

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(1) Article 43 was substituted by [S.R. 2014 No. 169](#).

(2) Article 43A was inserted by [S.R. 2014 No. 169](#).

**Amount of lump sum death benefit payable under this scheme when a transition member dies in service with accrued benefits in the NFPS**

29.—(1) This paragraph applies in relation to a transition member (T) who is a member of the NFPS and who dies as an active member of this scheme.

(2) Subject to paragraph (3), where T dies as a pensioner member of the NFPS, the amount of the lump sum death benefit payable under this scheme is the greater of the amount of the lump sum death benefit payable under regulation 104(2) and the amount of post-retirement death grant payable under article 36 (post-retirement death grant) of Part 5 of the NFPS.

(3) Where T at the time of T's death was a pensioner member of this scheme and an active member of this scheme, and regulation 106 (lump sum payable on death in certain cases) applies, in a case where the greater amount of the lump sum death benefit payable is that under regulation 105 (lump sum payable on death of pensioner member), "regulation 104" in sub-paragraph (2) is to be read as "regulation 105".

**Amount of lump sum death benefit payable under this scheme when a transition member dies in service with accrued benefits in the FPS**

30.—(1) This paragraph applies in relation to a transition member (T) who is a member of the FPS and who dies as an active member of this scheme.

(2) Sub-paragraph (3) applies where paragraph (5A) of article 2 of the FPS applied to T immediately before T died and a lump sum death grant of an amount specified in regulation 104(2) (lump sum payable on death of active member) of this scheme is payable to those persons that the scheme manager determines under regulation 103 (person to whom lump sum death benefit payable) and—

- (a) a lump sum death grant has been paid under article 37 of the FPS,
- (b) a payment of the balance of contributions has been made under article 39 of the FPS, or
- (c) a dependent relative's gratuity has been paid under article 38 of the FPS.

(3) Where this sub-paragraph applies, any payments which are referred to in sub-paragraph (a) or (b) or (c) of paragraph (2) and which have been made must be deducted from the lump sum death grant payable under regulation 104.

(4) Sub-paragraph (5) applies where T dies as a deferred member of the FPS or in receipt of a pension from that Scheme and a lump sum death grant of an amount specified in regulation 104(2) of this scheme is payable to those persons that the scheme manager determines under regulation 103 and—

- (a) a dependent relative's gratuity has been paid under article 38 of the FPS, or
- (b) an amount of post retirement death grant has been paid under article 39.

(5) Where this sub-paragraph applies, the payments which are referred to in sub-paragraph (a) or (b) of paragraph (4) and which have been made must be deducted from the amount of lump sum death grant payable under regulation 104.

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## PART 3C

### Transitional provisions relating to the NFPS and the FPS

#### **Pensionable service under the NFPS**

31.—(1) This paragraph applies in relation to a transition member (T) who is a connected member of the NFPS, or a connected special member of the NFPS, and has continuity of service.

(2) The following provisions of Chapter 2 (purchase of additional service) of Part 11 (pensionable pay, pension contributions and purchase of additional service) of the NFPS continue to apply after the transition date as if T continued in pensionable service under that scheme—

- (a) the provisions relating to the payment of periodical contributions for the purchase of additional service if T had made an election to purchase additional service under article 66 (election to purchase additional service) or if T returns to pensionable service as a firefighter after a period of unpaid service or absence and T elects to purchase additional service in respect of the period before the transition date under that article;
- (b) the provisions relating to the payment of the mandatory special period pension contributions payable in respect of an election to purchase service during the limited period under article 66A(3) (election to purchase service during the limited period).

(3) In determining whether T qualifies under the NFPS for retirement benefits (other than an award on ill-health retirement or a deferred pension), T's pensionable service under the NFPS terminates when T's pensionable service under this scheme terminates.

#### **Final salary of certain transition members for any purposes of the NFPS**

32.—(1) This paragraph applies to a transition member (T) with continuity of service who is in pensionable service under this scheme and is a member of the NFPS.

(2) Subject to sub-paragraphs (3) to (5), in determining T's final pensionable pay for any purposes of the NFPS under Schedule 7 to the 2014 Act (final salary link)—

- (a) the provisions of paragraph 1 or paragraph 2 of that Schedule apply as if “final salary” were a reference to “final pensionable pay”, and
- (b) pensionable pay derived from service under this scheme is to be regarded as derived from service under the NFPS.

(3) Where T's pensionable pay derived from service under this scheme at a time when T's final pensionable pay is determined for any purposes of the NFPS under Schedule 7 (final salary link) to the 2014 Act is lower than T's pensionable pay derived from service under the NFPS on the day before the transition date—

- (a) sub-paragraph (2) does not apply, and
- (b) T's final pensionable pay is determined in accordance with article 61 (pensionable pay) and article 62 (final pensionable pay) of Part 11 of the NFPS.

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(3) Article 66A was inserted by [S.R. 2015 No. 9](#).

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(4) Where T's pensionable pay derived from service under this scheme at the time when T's final pensionable pay is determined for any purposes of the NFPS under Schedule 7 to the 2014 Act (final salary link) is lower than the pensionable pay for any year after the transition date, the pensionable pay for the year of service before the reduction in pensionable pay is to be regarded for the purposes of Schedule 7 as the pensionable pay derived from service under the NFPS.

(5) The definition of pensionable pay derived from service under this scheme in regulation 26 (pensionable pay) is modified for the purposes of sub-paragraphs (2) and (4) by the omission of paragraph (1)(d) of that regulation and in a case where T is being paid an allowance or supplement within the meaning of paragraph (5A)(4) of article 61 to Part 11 of the NFPS which the employer would have treated as pensionable under that Scheme were the member still a firefighter member of that Scheme, that amount is treated as included in pensionable pay for the purposes of determining T's final pensionable pay under the NFPS.

#### **Final salary of certain transition members for any purposes of the FPS**

33.—(1) This paragraph applies in relation to a transition member (T) with continuity of service who is in pensionable service under this scheme and is a member of the FPS.

(2) Subject to sub-paragraphs (3) to (5), in determining T's average pensionable pay for any purposes of the FPS under Schedule 7 to the 2014 Act (final salary link)—

- (a) the provisions of paragraph 1 of that Schedule apply as if “final salary” were a reference to “average pensionable pay”, and
- (b) pensionable pay derived from service under this scheme is to be regarded as derived from service under the FPS.

(3) Where T's pensionable pay derived from service under this scheme at the time when T's average pensionable pay is determined for any purposes of the FPS under Schedule 7 to the 2014 Act (final salary link) is lower than T's pensionable pay derived from service under the FPS on the day before the transition date—

- (a) paragraph (2) does not apply, and
- (b) T's average pensionable pay is determined in accordance with article 56 (pensionable pay and average pensionable pay) of the FPS.

(4) Where T's pensionable pay derived from service under this scheme at the time when T's average pensionable pay is determined for any purposes of the FPS under Schedule 7 to the 2014 Act (final salary link) is lower than the pensionable pay for any year after the transition date, the pensionable pay for the year of service before the reduction in pensionable pay is to be regarded for the purposes of Schedule 7 as the pensionable pay derived from service under the FPS.

(5) The definition of pensionable pay derived from service under this scheme in regulation 26 is modified for the purposes of sub-paragraphs (2) and (4) by the omission of paragraph (1)(d) of that regulation and in a case where the member of the FPS is being paid an allowance or supplement within the meaning of paragraph (12) of article 56(5) (pensionable pay and average pensionable pay) which the employer would have treated as pensionable pay under that Scheme were the member still entitled to reckon pensionable service in that Scheme, that amount is included in pensionable pay for the purposes of determining T's average pensionable pay under the FPS.

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(4) Paragraph (5A) of Article 61 was inserted by [S.R. 2014 No. 168](#).

(5) Paragraph (12) of article 56 was inserted by [S.R. 2014 No. 169](#).

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### **Continuous pensionable service under the FPS**

34.—(1) This paragraph applies to a transition member (T) who was in pensionable service under the FPS on the date before that member's transition date and joined this scheme on the transition date, and has remained in pensionable service under this scheme until the date on which T qualifies under the FPS for an award under that Scheme.

(2) The requirement in paragraph (1) that T has remained in pensionable service under this scheme is satisfied where T has been or is treated as an active member of this scheme.

(3) In determining whether T qualifies under the FPS for retirement benefits (other than an award on ill-health retirement or to a deferred pension), T's pensionable service under the FPS terminates when T's pensionable service under this scheme terminates.

(4) For the purposes of calculating the pension under article 13A of the FPS and for the commutation under article 18 (commutation – general provision) of that Scheme, pensionable service under this scheme is reckonable under article 46 (current service) of that Scheme as 2015 pensionable service.

(5) Where T had elected to pay periodical contributions for increased benefits under article 62 (election to purchase increased benefits) of the FPS, these continue to be payable as if T continued in pensionable service under the FPS until T leaves pensionable service under the 2015 Scheme.

(6) If after the transition date T returns to work following a period of maternity or adoption leave and is entitled to elect to pay pension contributions under article 58 (optional pension contributions during maternity and adoption leave) of the FPS in respect of that period, the election may only be made in respect of the period before the transition date.

(7) Where this paragraph applies and T is entitled to an ordinary pension under article 13 (ordinary pension) of the FPS or a short service award under article 14 (short service award) of that Scheme, T's ordinary pension, or short service award, as the case may be, is calculated in accordance with Part IIA of Schedule 2 of the FPS and Part I and Part II of Schedule 2 to that Scheme do not apply.

### **Deferred member of the FPS**

35. A transition member with accrued benefits in the FPS to whom paragraph 34 does not apply is a deferred member of the FPS.

### **Deferred member of the NFPS**

36.—(1) A transition member with continuity of service (T), who is a connected member of the NFPS or a connected special member of the NFPS, does not become a deferred member of that Scheme unless T becomes a deferred member of this scheme in relation to the active member's account to which the qualifying service for that connected member of the NFPS or connected special member of the NFPS was added.

(2) If T opts out of this scheme in relation to a scheme employment, or leaves scheme employment before being entitled to a pension in relation to that pensionable service, and T has at least 3 months' qualifying service—

- (a) T becomes a deferred member of the NFPS in relation to pensionable service under that scheme; and
- (b) any periodical payments for additional service under the NFPS cease to be payable.



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(3) If T re-enters pensionable service under this scheme after a gap in service not exceeding 5 years, T ceases to be a deferred member of the NFPS.

**Scheme manager determines member of the NFPS is not entitled to an ill-health award**

37.—(1) This paragraph applies if the Board has decided to obtain the written opinion of an IQMP concerning whether a member of the NFPS is permanently disabled, or able to undertake regular employment before making a determination as to whether a member is entitled to an ill-health award, and the determination has not been made before the member's transition date.

(2) If this paragraph applies, the member joins this scheme on whichever is the latest of—

- (a) the member's transition date;
- (b) if the member decides not to appeal, the expiry of 14 days beginning with the date on which the member received a copy of the IQMP's opinion which the Board is required to supply under article 47 (appeal against opinion on a medical issue) of Part 8 of the NFPS.
- (c) if the member withdraws the appeal, the date of the withdrawal of the appeal.

**Scheme manager determines members of the FPS is not entitled to an ill-health award**

38.—(1) This paragraph applies if the Board has decided to obtain the written opinion of an IQMP under article 65 (determination by the Board) of the FPS concerning whether a member of that Scheme is permanently disabled, or able to undertake regular employment before making a determination as to whether a member is entitled to an ill-health award, and the determination has not been made before the member's transition date.

(2) If this paragraph applies, the member joins this scheme on whichever is the latest of—

- (a) the member's transition date;
- (b) if the member decides not to appeal, the expiry of 14 days beginning with the date on which the member received a copy of the IQMP's opinion which the Board is required to supply under article 66 (appeal against opinion on a medical issue) of Part H of the FPS;
- (c) if the member withdraws the appeal, the date of the withdrawal of the appeal.

**Repayment of contributions under the NFPS**

39. If a transition member with continuity of service (T) opts out of this scheme and T has less than 3 months' qualifying service in the NFPS and this scheme—

- (a) T must be repaid pension contributions and special pension contributions and mandatory special period pension contributions paid under the NFPS; and
- (b) any further periodical payments for additional service to be paid under the NFPS cease to be payable.

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#### **Qualifying for retirement benefits under the NFPS**

40. In determining whether a transition member with continuity of service qualifies for retirement benefits under the NFPS, the member's qualifying service includes the total of—

- (a) the member's qualifying service under the NFPS; and
- (b) the member's qualifying service under this scheme.

#### **Qualifying for retirement benefits under the FPS**

41. In determining whether a transition member with continuity of service qualifies for retirement benefits under the FPS, the member's qualifying service includes the total of—

- (a) the member's qualifying service under the FPS; and
- (b) the member's qualifying service under this scheme.

#### **Final salary link not to apply again to a pension in payment under the NFPS**

42. Where any element of a pension under the NFPS which is in payment under that Scheme has been calculated by reference to Schedule 7 (final salary link) to the 2014 Act, that element of the pension is not recalculated by reference to Schedule 7 in consequence of a subsequent period of pensionable public service (within the meaning of paragraph 3 of Schedule 7 to the 2014 Act).

#### **Final salary link not to apply to a pension in payment under the FPS**

43. Where any element of a pension under the FPS which is in payment under that Scheme has been calculated by reference to Schedule 7 (final salary link) to the 2014 Act, that element of the pension is not recalculated by reference to Schedule 7 (final salary link) to the 2014 Act in consequence of a subsequent period of pensionable public service (within the meaning of paragraph 3 to Schedule 7 to the 2014 Act).

## **PART 3D**

### **Transfer of final salary benefits**

#### **Meaning of "final salary benefit"**

44.—(1) In this Part, "final salary benefit" means benefit accrued under a final salary scheme, subject to sub-paragraph (2).

(2) Where only part of the pension entitlement payable under a final salary scheme in respect of that person which is based on the pensionable service of that person is or may be determined by reference to the person's final salary, "final salary benefit" means the benefit in respect of which the pension entitlement is so determined.

#### **Acceptance of club transfer value payments**

45. Any part of a club transfer value payment from another scheme that relates to a members final salary benefit must be paid into the NFPS.

**Member of this scheme or the NFPS**

46.—(1) This paragraph applies to a person who transfers final salary benefits into the NFPS.

(2) Unless the person is a protected member of the NFPS the person's service in relation to the final salary benefits which have been transferred into the NFPS is taken to be qualifying service for the purposes of this Scheme and, the person—

- (a) becomes a member of this scheme; and
- (b) is taken to be a transition member with continuity of service.”.