

---

## STATUTORY RULES OF NORTHERN IRELAND

---

### 2015 No. 122

## The Health and Social Care Pension Scheme (Transitional and Consequential Provisions) Regulations (Northern Ireland) 2015

### PART 2

#### Transitional provisions

#### CHAPTER 1

#### Eligibility

#### Eligibility of pensioners

3. Schedule 1 (Eligibility of pensioners) has effect.

---

#### Commencement Information

- I1** Reg. 3 in operation at 1.4.2015, see [reg. 1\(1\)](#)

#### CHAPTER 2

#### Notices and elections

#### Carry-forward of old scheme opt-out

4. Where, on the date a person becomes eligible to join the new scheme, that person has—
- (a) opted out of membership of the old scheme pursuant to regulation—
    - (i) 9 of the 1995 Regulations; or
    - (ii) 25 or 157 of the 2008 Regulations; or
  - (b) provided their employer with a valid opt-out notice for the purposes of regulations 9 or 15 of the Occupational and Personal Pension Schemes (Automatic Enrolment) Regulations (Northern Ireland) 2010(1) (“the 2010 Regulations”),

that person is to be treated as having also opted out under paragraph 1 of Schedule 4 to the 2015 Regulations or given notice for the purposes of the 2010 Regulations in relation to the new scheme.

---

#### Commencement Information

- I2** Reg. 4 in operation at 1.4.2015, see [reg. 1\(1\)](#)

---

(1) [S.R. 2010 No.122](#); Regulation 9 was amended by [S.R. 2013 No.243](#)

## Nominations, notices and declarations

5.—(1) Paragraph (2) applies where—

- (a) a nomination, notice or declaration of the type specified in column 1 of the table has been accepted in respect of benefits to be paid on the death of a person who is a member of the 1995 Section or the 2008 Section of the old scheme; and
- (b) on the day that the member becomes an active member of the 2015 Scheme, the member has not revoked that nomination, notice or declaration.

**Table**

<i>Column 1</i>	<i>Column 2</i>
<i>Nomination, notice or declaration in the 1995 Section or 2008 Section</i>	<i>Corresponding notice or declaration in the 2015 Scheme</i>
A nomination made in accordance with regulation 22 of the 1995 Regulations (payment of lump sum) in favour of one or more persons in respect of any lump sum that becomes payable under regulations 18 to 21 of the 1995 Regulations (which deal with lump sum payments on the death of a 1995 Section member in different circumstances).	A notice given in accordance with paragraph 9 (payment of lump sums on death) of Schedule 12 (lump sum on death) to the 2015 Regulations in favour of one or more persons in respect of any lump sums that become payable under regulation 111 of the 2015 Regulations.
A notice given in accordance with regulation 67 or 214 of the 2008 Regulations (payment of lump sums or pensions on death) in favour of one or more persons in respect of any lump sums or pensions that become payable under regulation 82 or 209 of the 2008 Regulations (which deal with lump sum or pension payments on the death of a 2008 Section member in different circumstances).	
A notice given for the purpose of paragraph (3) (a) of regulation 22 of the 1995 Regulations that the member's surviving partner (within the meaning of that regulation) is not to receive payment of any lump sum that becomes payable under regulations 18 to 21 of the 1995 Regulations.	A notice given in accordance with paragraph 9 (payment of lump sums on death) of Schedule 12 (lump sum on death) to the 2015 Regulations specifying that the member's personal representatives are to receive any lump sum on the death of the member payable under regulation 111 of the 2015 Regulations.
<b>F1</b> ...	<b>F2</b> ...
<b>F3</b> ...	

(2) Where this paragraph applies, for the purposes of the 2015 Scheme, the nomination, notice or declaration mentioned is to be treated as if it had been accepted by the scheme manager as the corresponding notice or declaration in column 2 of the table in paragraph (1).

(3) The revocation of—

- (a) a nomination, notice or declaration of the type specified in column 1 of the table in paragraph (1) will also revoke the corresponding notice or declaration in column 2 of that table without more;
  - (b) a notice or declaration of the type specified in column 2 of the table in paragraph (1) will also revoke the corresponding nomination, notice or declaration in column 1 of that table without more.
- (4) The—
- (a) making of a new a nomination or declaration, or giving of a new notice, of the type specified in column 1 of the table in paragraph (1) is also to be treated by the scheme manager as the giving of the corresponding notice or making of the corresponding declaration in column 2 of that table without more;
  - (b) giving of a new a notice or making of a new declaration of the type specified in column 2 of the table in paragraph (1) is also to be treated by the Department as the making of the corresponding nomination or declaration, or giving of the corresponding notice, of the type specified in column 1 of that table without more.

- F1** Words in [reg. 5\(1\)](#) Table omitted (16.8.2022) by virtue of [The Health and Social Care Pension Schemes, Additional Voluntary Contributions and Injury Benefits \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/196\)](#), regs. 1(2), **81(a)(i)**
- F2** Words in [reg. 5\(1\)](#) Table omitted (16.8.2022) by virtue of [The Health and Social Care Pension Schemes, Additional Voluntary Contributions and Injury Benefits \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/196\)](#), regs. 1(2), **81(b)**
- F3** Words in [reg. 5\(1\)](#) Table omitted (16.8.2022) by virtue of [The Health and Social Care Pension Schemes, Additional Voluntary Contributions and Injury Benefits \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/196\)](#), regs. 1(2), **81(a)(ii)**

**Commencement Information**

- I3** Reg. 5 in operation at 1.4.2015, see [reg. 1\(1\)](#)

## CHAPTER 3

### Membership status and breaks in service

#### Active member status preservation

**6.** Unless otherwise provided in these Regulations, a transition member who is an active member of the new scheme is to be treated, for the purposes of the old scheme, as though they continue to be an active member of the old scheme notwithstanding the operation of section 18(1) of the 2014 Act.

**Commencement Information**

- I4** Reg. 6 in operation at 1.4.2015, see [reg. 1\(1\)](#)

#### Qualifying service

**7.—(1)** In determining whether a transition member who is in pensionable service under the new scheme qualifies for retirement benefits (other than ill-health pension) under the old scheme, the member's pensionable service under the old scheme terminates when the member's pensionable service under the new scheme terminates.

**(2)** Unless a transition member becomes a deferred member of the new scheme, the member does not become—

- (a) a member with a preserved pension in the 1995 Section; or
- (b) a deferred member of the 2008 Section.

(3) Where a transition member with more than two years of qualifying service opts out of membership of the new scheme pursuant to regulation 15 of the 2015 Regulations, the member becomes—

- (a) a member with a preserved pension under the 1995 Section; or
- (b) a deferred member of the 2008 Section,

in relation to service in that Section.

(4) Where a transition member has re-entered pensionable service under the new scheme, that member ceases to be—

- (a) a member with a preserved pension in the 1995 Section; or
- (b) a deferred member of the 2008 Section.

(5) In determining whether a member qualifies for benefits under the old scheme, the period of the member's qualifying service under regulation 22 of the new scheme applies in place of the period calculated pursuant to regulation—

- (a) 5 of the 1995 Regulations; or
- (b) 10 or 141 of the 2008 Regulations.

#### Commencement Information

**I5** Reg. 7 in operation at 1.4.2015, see [reg. 1\(1\)](#)

#### Members on authorised unpaid leave

**8.** Where, on the date a person becomes eligible to join the new scheme, that person is on a leave of absence during which they are paying contributions pursuant to regulation 66 of the 1995 Regulations or 9(3) or 140(3) of the 2008 Regulations—

- (a) regulation 21 of the 2015 Regulations applies to that person; and
- (b) for the purposes of determining whether and for how long that person may continue to pay contributions under the 2015 Regulations, the contributions paid and the period of absence under the old scheme must be taken into account.

#### Commencement Information

**I6** Reg. 8 in operation at 1.4.2015, see [reg. 1\(1\)](#)

#### Casual staff and locums not working on eligibility date

**9.—(1)** Paragraph (2) applies where, on the date a person becomes eligible to join the new scheme, that person—

- (a) is—
  - (i) employed on a casual basis and has ceased to pay contributions under regulation 5(4A)(2) of the 1995 Regulations or 10(2) of the 2008 Regulations; or

- (ii) a locum practitioner and has ceased to pay contributions under paragraph 9A(3) of Schedule 2 to the 1995 Regulations or regulation 141(2) of the 2008 Regulations; and
  - (b) has ceased to pay those contributions because of a break which, on the date they become eligible to join the new scheme, is a break not exceeding a period of three months (“a relevant break”),
- (2) Regulation 22(5) and (6) of the 2015 Regulations applies as though the member’s relevant break had commenced whilst the member was an active member of the new scheme.

#### Commencement Information

**I7** Reg. 9 in operation at 1.4.2015, see [reg. 1\(1\)](#)

#### Disqualifying breaks in service

- 10.**—(1) Paragraph (3) applies to a member with pensionable service in the old scheme who—
- (a) on 1st April 2015—
    - (i) is on a break in HSC employment in the old scheme; or
    - (ii) has opted out of the old scheme pursuant to regulation—
      - (aa) 9 of the 1995 Regulations; or
      - (bb) 25 or 157 of the 2008 Regulations;
  - (b) was not—
    - (i) entitled to a preserved pension under regulation 49 of the 1995 Regulations; or
    - (ii) a deferred member of the 2008 Section in respect of that service, when that service ceased; and
  - (c) subsequently becomes an active member of the new scheme.
- (2) Paragraph (4) applies to a member with pensionable service in the old scheme who—
- (a) subsequently becomes an active member of the new scheme;
  - (b) has a break in pensionable service in the new scheme commencing on or after 2nd April 2015; and
  - (c) is not qualified for retirement benefits pursuant to regulation 71 of the 2015 Regulations on ceasing pensionable service in the new scheme.
- (3) Where a member’s break between pensionable service in the old scheme and pensionable service in the new scheme is less than one year—
- (a) the contributions in respect of old scheme service are not refundable to the member under regulation—
    - (i) 50 of the 1995 Regulations; or
    - (ii) 44 or 175 of the 2008 Regulations; and
  - (b) if a refund under those regulations was paid in respect of the member’s old scheme service during the break, the member may repay that refund (including any interest on those contributions which was paid to the member) under regulation—
    - (i) 52(5) of the 1995 Regulations; or
    - (ii) 9(8) or 140(8) of the 2008 Regulations,

within six months of joining the new scheme.

- (4) Where a member's break in pensionable service in the new scheme is five years or less—
- (a) the contributions in respect of old scheme service are not refundable to the member under regulation—
    - (i) 50 of the 1995 Regulations; or
    - (ii) 44 or 175 of the 2008 Regulations; and
  - (b) if a refund under those regulations was paid in respect of the member's old scheme service during the break, the member may repay that refund (including any interest on those contributions which was paid to the member) under regulation—
    - (i) 52(5) of the 1995 Regulations; or
    - (ii) 9(8) or 140(8) of the 2008 Regulations,
 within six months of joining the new scheme.

#### Commencement Information

**I8** Reg. 10 in operation at 1.4.2015, see [reg. 1\(1\)](#)

## CHAPTER 4

### Contributions and final pay

#### Contribution rate setting: Groups A to C

**11.**—(1) This regulation applies to a transition member who belongs to Groups A, B or C in regulation 27(1) of the 2015 Regulations and who on 31st March [<sup>F4</sup>2022] was—

- (a) a member in pensionable employment in the 1995 Section; or
- (b) an active member of the 2008 Section.

(2) Where this regulation applies, for the purposes of setting a contribution rate for the scheme year commencing on 1st April [<sup>F5</sup>2022] —

- (a) paragraph 2 of Schedule 9 to the 2015 Regulations applies as though the member was in pensionable service with the same employing authority on both—
  - (i) the last day of the previous scheme year, and
  - (ii) the first day of the current scheme year;
- (b) in determining which of the cases the member falls into pursuant to sub-paragraph (2) of that paragraph, the member is to be assessed as if during the scheme year 1st April [<sup>F6</sup>2021] to 31st March [<sup>F7</sup>2022] —
  - (i) that member's pensionable employment (within the meaning of the 1995 Section) or active service (within the meaning of the 2008 Section) was actually pensionable employment under the 2015 Regulations; and
  - (ii) the percentage rate of contributions paid by the member during that year in the relevant Section was actually the percentage rate of contributions paid during the previous scheme year under the 2015 Regulations.

**F4** Word in [reg. 11\(1\)](#) substituted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(2)(a)**

- F5** Word in [reg. 11\(2\)](#) substituted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), [5\(2\)\(b\)\(i\)](#)
- F6** Word in [reg. 11\(2\)\(b\)](#) substituted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), [5\(2\)\(b\)\(ii\)\(aa\)](#)
- F7** Word in [reg. 11\(2\)\(b\)](#) substituted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), [5\(2\)\(b\)\(ii\)\(bb\)](#)

#### Commencement Information

- I9** Reg. 11 in operation at 1.4.2015, see [reg. 1\(1\)](#)

### Contribution rate setting: Group D

**12.—(1)** This regulation applies to a transition member who belongs to Group D in regulation 27(1) of the 2015 Regulations and who on 31st March [<sup>F8</sup>2022] was—

- (a) a member in pensionable employment in the 1995 Section; or
- (b) an active member of the 2008 Section.

(2) Where this regulation applies, for the purposes of setting a contribution rate for the scheme year commencing on 1st April [<sup>F9</sup>2022], in regulations 37(4)(b) and 38(4)(b) of the 2015 Regulations, the member's most recent certified or final pensionable earnings are to be the member's certified earnings or final pensionable earnings derived from the member's—

- (a) pensionable employment in the 1995 Section, in accordance with paragraph 23 to Schedule 2 of the 1995 Regulations; or
- (b) active service in the 2008 Section, in accordance with regulation 260 of the 2008 Regulations.

- F8** Word in [reg. 12\(1\)](#) substituted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), [5\(3\)\(a\)](#)
- F9** Word in [reg. 12\(2\)](#) substituted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), [5\(3\)\(b\)](#)

#### Commencement Information

- I10** Reg. 12 in operation at 1.4.2015, see [reg. 1\(1\)](#)

### Taper protection for contribution tiering

**13.—(1)** This regulation applies to—

- (a) a member who—
  - (i) is in pensionable employment in the 1995 Section on the day before they reach their eligibility cessation date (determined in accordance with regulation 8(15) or (16) of the 1995 Regulations<sup>(4)</sup>); and
  - (ii) who becomes an active member of the 2015 Scheme on that eligibility cessation date;
- (b) a member who—
  - (i) is an active member of the 2008 Section on the day before they reach their eligibility cessation date (determined in accordance with regulations 22(1F) or 154(1F) of the 2008 Regulations<sup>(5)</sup>); and

(4) Paragraphs (15) and (16) are inserted by paragraph 4 of Schedule 2

(5) Paragraph (1F) was inserted in each regulation by paragraphs 11 and 17 of Schedule 2 respectively

- (ii) who becomes an active member of the 2015 Scheme on that eligibility cessation date.
- (2) Where this regulation applies—
  - (a) the member must pay contributions during the scheme year within which their eligibility cessation date falls at the percentage rate that applied to them on the day before their eligibility cessation date is reached under—
    - (i) regulation 10 of, or paragraph 10 of Schedule 2 to, the 1995 Regulations; or
    - (ii) regulation 28 or 161 of the 2008 Regulations;
  - (b) in the case of a member who belongs to Group A, B, or C in regulation 27(1) of the 2015 Regulations, the member must pay that rate for the remainder of the scheme year unless there is a change to the member's employment or rate of pensionable earnings during that scheme year pursuant to paragraph 3 of Schedule 9 to the 2015 Regulations (in which case the rate of the member's percentage contribution rate for the remainder of the scheme year must be re-assessed in accordance with that paragraph);
  - (c) in the case of a member who belongs to Group D in regulation 27(1) of the 2015 Regulations, the member must pay that rate for the remainder of the scheme year unless—
    - (i) the Regional Health and Social Care Board (RHSCB) adjusts the member's contribution rate pursuant to paragraph (6) of whichever of regulations 37 or 38 of the 2015 Regulations applies to the member; or
    - (ii) paragraph (2)(a) or (b) of whichever of regulations 37 or 38 of the 2015 Regulations applies to the member is subsequently satisfied in respect of the member (in which case the member must pay the rate determined in accordance with paragraph (3) of whichever of those regulations applies to the member).

#### Commencement Information

**I11** Reg. 13 in operation at 1.4.2015, see [reg. 1\(1\)](#)

#### Determination of pensionable pay, final pensionable pay and reckonable pay

**14.—(1)** For any purpose of the old scheme including the calculation of benefits payable under that scheme to or in respect of a 1995 officer transition member, the member's pensionable pay and final year's pensionable pay are to be determined by reference to the 1995 Regulations (see in particular Part 1 of those Regulations).

**(2)** For any purpose of the old scheme including the calculation of benefits payable under that scheme to or in respect of a 2008 officer transition member, the member's pensionable pay and reckonable pay are to be determined by reference to the 2008 Regulations (see in particular Chapter 1 of Part 2 of those Regulations).

#### Commencement Information

**I12** Reg. 14 in operation at 1.4.2015, see [reg. 1\(1\)](#)



### No refund of contributions in cases of inordinate pay

15. Where the Department determines the amount of a 1995 officer transition member's final year's pensionable pay pursuant to paragraph (10) of regulation 3 of the 1995 Regulations, no refund of contributions is payable under paragraphs (12)(b) and (c) of that regulation<sup>(6)</sup>.

#### Commencement Information

I13 Reg. 15 in operation at 1.4.2015, see [reg. 1\(1\)](#)

### Cessation of final salary link on payment of benefits

16. Where an officer transition member's benefits under the old scheme calculated by reference to Schedule 7 to the 2014 Act have been put into payment, those benefits cannot be recalculated by reference to that Schedule where there is a subsequent period of pensionable public service within the meaning of paragraph 3 of that Schedule.

#### Commencement Information

I14 Reg. 16 in operation at 1.4.2015, see [reg. 1\(1\)](#)

### Final salary link: Mental Health Officers

17.—(1) This regulation applies to a 1995 officer transition member—

- (a) to whom regulation 76(1) of the 1995 Regulations applied on the member's last day of pensionable service in the 1995 Section;
- (b) to whom regulation 76(10) or (11) of the 1995 Regulations applied on the member's last day of pensionable service in the 1995 Section; and
- (c) who has at least one day of pensionable service in the new scheme ("notional mental health officer service") which, had it been served in the 1995 Section, would have—
  - (i) satisfied the definition of "mental health officer" in regulation 76(14) of the 1995 Regulations, and
  - (ii) been service to which regulation 76(1) would have applied.

(2) Where this regulation applies, the final year's pensionable pay to be used in the calculation of the member's benefits under regulation 76(10) or (11) of the 1995 Regulations will be that derived from the member's notional mental health officer service.

#### Commencement Information

I15 Reg. 17 in operation at 1.4.2015, see [reg. 1\(1\)](#)

### Uprating of old scheme practitioner earnings

18.—<sup>F10</sup>(1) Subject to paragraphs (2) and (3), in relation to a practitioner transition member as regards the period after 31<sup>st</sup> March 2015 in which the member is a member of the new scheme.

- (a) paragraph 11(2)(b) of Schedule 2 to the 1995 Regulations; and

(6) Paragraphs (10) and (12) were inserted by [S.R. 2015 No.121](#), regulation 4(3)

(b) regulation 176(4) of the 2008 Regulations, apply as though the words “the annual increase due under the provisions of the Pensions (Increase) Act (Northern Ireland) 1971 and Article 69 of the Social Security Pensions (Northern Ireland) Order 1975, plus” were omitted.]

[<sup>F11</sup>(2) Paragraph (3) applies if a practitioner transition member is purchasing additional service pursuant to regulation 22 (Existing additional service and unreduced lump sum contracts).

(3) Paragraph (1) does not apply for the purposes of calculating that member’s uprated pensionable earnings in relation to that purchase for the purposes of sub-paragraph (5) of paragraph 20 of Schedule 2 to the 1995 Regulations.]

**F10** Reg. 18 renumbered as reg. 18(1) and words substituted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(4)(a)**

**F11** Reg. 18(2)(3) inserted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(4)(b)**

#### Commencement Information

**I16** Reg. 18 in operation at 1.4.2015, see [reg. 1\(1\)](#)

### Flexibility earnings credit: calculation

**19.—**(1) This regulation and regulations 20 and 21 apply to a transition member who—

- (a) has pensionable service as a practitioner in either the old scheme or the new scheme; and
- (b) has pensionable service in the old scheme as an officer.

(2) Where this regulation applies, the member is entitled to a flexibility earnings credit equal to—

$$\frac{(F - P)}{A}$$

where—

F is the total amount of the member’s pension in the old scheme as at the last day of pensionable service in that scheme;

P is the amount of the member’s pension in the old scheme arising solely from service as a practitioner as at the last day of pensionable service in that scheme;

A is—

- (i) 1.4% if the 1995 Section applies to the member;
- (ii) 1.87% if the 2008 Section applies to the member,

and the amounts of pension for the purposes of this calculation are amounts before any actuarial reduction is applied by reason of payment before normal pension age for the relevant Section.

#### Commencement Information

**I17** Reg. 19 in operation at 1.4.2015, see [reg. 1\(1\)](#)

### Flexibility earnings credit: uprating

**20.**—(1) The amount of a flexibility earnings credit calculated under regulation 19(2) is to be increased at the rate specified in paragraph (2) for each year or part year from the day after the last day of pensionable service in the old scheme until the earlier of—

- (a) the claiming of pension benefits under the old scheme;
- (b) the member's last day of pensionable employment under the 2015 Regulations; or
- (c) where the member has one or more breaks of service under the 2015 Regulations that exceeds five years, the last day of pensionable service following which the earliest such break commenced,

in order to generate an uprated flexibility earnings credit.

(2) The annual rate of increase of a flexibility earnings credit is the rate set for that year by the Department after having taken the advice of the scheme actuary for the purpose.

#### Commencement Information

**I18** Reg. 20 in operation at 1.4.2015, see [reg. 1\(1\)](#)

### Flexibility earnings credit: adjustment of pension payable

**21.**—(1) Where pension benefits are payable under the old scheme, the amount payable is adjusted as follows.

(2) As regards the element of pension payable under the old scheme in respect of service as an officer, the member is entitled only to the higher of—

- (a) the amount of pension actually payable under the old scheme in respect of service as an officer;
- (b) the amount of pension payable under the old scheme—
  - (i) as if the member's period of pensionable service as an officer were treated as pensionable service as a practitioner, and
  - (ii) as though the uprated flexibility earnings credit were treated as pensionable earnings as a practitioner for that period,

and the provisions of paragraphs 9 and 11A of Schedule 2 the 1995 Regulations<sup>(7)</sup> and Part 4 of the 2008 Section do not apply.

#### Commencement Information

**I19** Reg. 21 in operation at 1.4.2015, see [reg. 1\(1\)](#)

## CHAPTER 5

### Additional contributions

#### Existing additional service and unreduced lump sum contracts

**22.**—(1) This regulation applies to a member of the new scheme who—

<sup>(7)</sup> Paragraph (11A) was inserted by [S.R. 2005 No.155](#) regulation 10(2) and amended by [S.R. 2010 No.22](#) regulation 11(3)

- (a) on the member's last day of pensionable service in the 1995 Section was paying for additional service or an unreduced retirement lump sum by regular additional contributions pursuant to regulation 72 of the 1995 Regulations;
  - (b) does not have a break between the last day of pensionable service in the 1995 Section and the first day of pensionable service in the new scheme lasting for 12 months or more.
- (2) Where this regulation applies, the provisions of—
- (a) regulations 67 to 72 of the 1995 Regulations continue to apply to the member as though the member continues in pensionable service under the 1995 Section until the earliest of—
    - (i) the chosen date (as defined in regulation 72 of the 1995 Regulations);
    - (ii) if the member has a break in pensionable service under the new scheme lasting for 12 months or more, the last day of pensionable service that preceded that break;
    - (iii) the day preceding the day on which the member stops paying additional contributions; or
    - (iv) retirement from pensionable employment under the new scheme; and
  - (b) regulation 73B(8) of the 1995 Regulations continues to apply if the member who is paying for additional service or unreduced retirement lump sum by regular additional contributions stops paying before the chosen date under regulation 72(3) of the 1995 Regulations,

the member's pensionable earnings in the new scheme are to be treated as the member's pensionable pay in the 1995 Section for the purpose of determining the amount of any additional contributions due.

---

**Commencement Information**

**I20** Reg. 22 in operation at 1.4.2015, see [reg. 1\(1\)](#)

**Existing additional pension contracts**

- 23.—**(1) This regulation applies to a member of the new scheme who—
- (a) on the member's last day of pensionable service in the old scheme was paying for additional pension by additional periodical contributions pursuant to regulation—
    - (i) 73A of the 1995 Regulations; or
    - (ii) 34 or 165 of the 2008 Regulations;
  - (b) does not have a break between the last day of pensionable service in the old scheme and the first day of pensionable service in the new scheme lasting for 12 months or more.
- (2) Where this regulation applies, the provisions of—
- (a) the relevant regulations continue to apply to the member as though the member continues in pensionable service under the old scheme until the earliest of—
    - (i) the end of the contribution option period (as defined in the old scheme);
    - (ii) if the member has a break in pensionable service under the new scheme lasting for 12 months or more, the last day of pensionable service that preceded that break;
    - (iii) the day preceding the day on which the member stops paying additional periodical contributions; or
    - (iv) retirement from pensionable employment under the new scheme; and

---

(8) Regulations 73A to 73J were inserted by [S.R. 2008 No.163](#) regulation 51

- (b) regulation—
  - (i) 73I of the 1995 Regulations, or
  - (ii) 42 or 173 of the 2008 Regulations,continues to apply if the member who is paying for additional pension by additional periodical contributions stops paying before the end of the contribution option period.
- (3) In paragraph (2), “relevant regulations” means—
  - (a) in the case of a member whose old scheme service was in the 1995 Section, regulations 73A to 73H and 73J of the 1995 Regulations; and
  - (b) in the case of a member whose old scheme service was in the 2008 Section—
    - (i) regulations 34 to 41 and 43 to 44; or
    - (ii) regulations 165 to 172 and 174 to 175,of the 2008 Regulations.

**Commencement Information**

**I21** Reg. 23 in operation at 1.4.2015, see [reg. 1\(1\)](#)

**Additional contributions: ill-health**

- 24.** Where regulation 22 or 23 applies, references to—
- (a) regulation 13 and 13A in regulations 73 and 73H of the 1995 Section;
  - (b) regulation 52 in regulation 41 of the 2008 Section; and
  - (c) regulation 182 in regulation 172 of the 2008 Section,

are to be read as references to an ill-health pension under regulation 89 of the 2015 Regulations in accordance with regulations 28 and 29 of these Regulations.

**Commencement Information**

**I22** Reg. 24 in operation at 1.4.2015, see [reg. 1\(1\)](#)

**Decoupling of benefits derived from additional contributions**

**25.—(1)** This regulation applies to a transition member who has accrued entitlements in the 1995 Section from the payment of additional contributions under Part VIII of the 1995 Regulations.

(2) Where this regulation applies, the member may elect that the part of a pension payable under regulation 12 of the 1995 Regulations derived solely from the payment of additional contributions under Part VIII of those Regulations should be payable from—

- (a) the member’s chosen date (subject to paragraph (10), as defined in regulation 72(3)), [<sup>F12</sup>or, if later, the date on which the member joins the new scheme,] in the case of purchase of additional service;
- (b) the member’s chosen birthday (subject to paragraph (10), as defined in regulation 73A), [<sup>F13</sup>or, if later, the date on which the member joins the new scheme,] in the case of purchase of additional pension,

notwithstanding the fact that the member continues in pensionable service under the new scheme (and for the purposes of any calculation, the member is to be taken to have retired from pensionable

service on the member's chosen date or <sup>F14</sup>... chosen birthday (as applicable)) [<sup>F15</sup>or, if later, the date on which the member joins the new scheme].

(3) Paragraph (4) applies where the member has—

- (a) made more than one election under regulation 70 or 72 of the 1995 Regulations;
- (b) exercised the option under regulation 73A or 73C of the 1995 Regulations more than once; or
- (c) made one or more elections under regulation 72 of the 1995 Regulations and exercised the option under regulation 73A of the 1995 Regulations once or more.

(4) Any election under paragraph (2)—

(a) must—

- (i) where it relates to an election under regulation 70 or 72 of the 1995 Regulations be made in relation to every election under those regulations; and
- (ii) where it relates to an election under regulation 73A or 73C of the 1995 Regulations be made in relation to every election under those regulations;

which has the same date as the member's chosen date or chosen birthday (as applicable); and

- (b) may be made on a second or subsequent occasion in respect of elections under regulation 70 or 72 of the 1995 Regulations and options under regulation 73A or 73C of the 1995 Regulations which have as the member's chosen date or chosen birthday (as applicable) a date different from any date in respect of which an election has previously been made under paragraph (2).

(5) Regulations 17 and 17A of the 1995 Regulations (where relevant) apply in relation to a payment made pursuant to this regulation.

(6) An election for the purposes of paragraph (2) must be given in writing to the scheme manager, containing such information as the scheme manager [<sup>F16</sup>requires—

- (a) no later than one month before the member's chosen date or chosen birthday (as applicable); or

(b) if—

- (i) the member joins the new scheme less than six months before the member's chosen date or chosen birthday (as applicable); or
- (ii) the member joins the new scheme on or after the member's chosen date or chosen birthday (as applicable),

no later than five months after the date on which the scheme manager provides the notification referred to in paragraph (9).]

(7) Where payment of part of a pension is made pursuant to paragraph (2) in respect of additional service resulting from an election under regulation 70 or 72 of the 1995 Regulations—

- (a) regulations 19, 25 and 35 of the 1995 Regulations apply to that part of a pension as though it was the member's pension for the purposes of those regulations;
- (b) the 1995 Regulations apply to the member's remaining entitlements under those Regulations as though no additional contributions had been made under Part VIII; and
- (c) no further pension in respect of the additional contributions actually paid under Part VIII of the 1995 Regulations is payable under those Regulations.

(8) Where payment of part of a pension is made pursuant to paragraph (2) in respect of additional pension resulting from an option under regulation 73A or 73C of the 1995 Regulations—

- (a) regulation 73G(4) to (8) of the 1995 Regulations applies;

- (b) the 1995 Regulations apply to the member's remaining entitlements under those Regulations as though no additional contributions had been made under Part VIII; and
  - (c) no further pension in respect of the additional contributions actually paid under Part VIII of the 1995 Regulations is payable under those Regulations.
- (9) The scheme manager must notify the member in writing of the right to make an election under this <sup>F17</sup>regulation—
- (a) at least six months before the member's chosen date or chosen birthday (as applicable); or
  - (b) if the member joins the new scheme at a time specified in paragraph (6)(b)(i) or (ii), no later than three months after the date on which the member joins the new scheme.]
- <sup>F18</sup>(9A) A notice for the purpose of paragraph (9) must specify—
- (a) the date on which any pension payable pursuant to this regulation would come into payment were an election to be made;
  - (b) the amount of any pension payable under this regulation (before any option to commute part of the pension into a lump sum); and
  - (c) the date by which the election under this regulation must be received by the scheme manager pursuant to paragraph (6).]
- (10) In paragraph (2)—
- (a) the “chosen date” for an election under regulation 70 is the date of the member's 60th birthday; and
  - (b) the “chosen birthday” for an election under regulation 73C is the member's 60th birthday.

- F12** Words in [reg. 25\(2\)\(a\)](#) inserted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(5)(a)(i)**
- F13** Words in [reg. 25\(2\)\(b\)](#) inserted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(5)(a)(ii)**
- F14** Words in [reg. 25\(2\)](#) omitted (1.4.2022) by virtue of [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(5)(a)(iii)(aa)**
- F15** Words in [reg. 25\(2\)](#) inserted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(5)(a)(iii)(bb)**
- F16** Words in [reg. 25\(6\)](#) substituted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(5)(b)**
- F17** Words in [reg. 25\(9\)](#) substituted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(5)(c)**
- F18** [Reg. 25\(9A\)](#) inserted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(5)(d)**

#### Commencement Information

- I23** Reg. 25 in operation at 1.4.2015, see [reg. 1\(1\)](#)

## CHAPTER 6

### Bulk Transfers

#### Acceptance of bulk transfers

**26.**—(1) If, in circumstances where regulation 147 of the 2015 Regulations applies, the special terms agreed for the acceptance of transfer payments require such part of a transfer value payment as relates to a member's final salary benefits to be paid into the 1995 Section or the 2008 Section, that part of the transfer value must be paid into that Section.

- (2) In this regulation, “final salary benefit” means—
- (a) benefit accrued under a final salary scheme; and
  - (b) where only part of the pension entitlement payable under a final salary scheme to or in respect of a person which is based on the pensionable service of that person is or may be determined by reference to the person’s final salary, the benefit in respect of which the pension entitlement is so determined.

#### Commencement Information

**I24** Reg. 26 in operation at 1.4.2015, see [reg. 1\(1\)](#)

## CHAPTER 7

### Retirement benefits

#### Ill health benefits: continuity of existing applications

- 27.**—(1) This regulation applies [<sup>F19</sup>during the application period] to a member—
- (a) who, [<sup>F20</sup>on 1st April 2022 (“the transition date”)—]
    - (i) is prevented from contributing to or accruing further [<sup>F21</sup>pensionable] service in the 1995 Section or being an active member of the 2008 [<sup>F22</sup>Section; and]
      - <sup>F23</sup>(aa) . . . . .
      - <sup>F24</sup>(bb) . . . . .
    - (ii) becomes eligible to join the new scheme <sup>F25</sup>...;
  - (b) who submitted Form AW33 (or such other form as the Department accepted) together with supporting medical evidence [<sup>F26</sup>(if] not included in the form) for the purposes of [<sup>F27</sup>1995 regulation 13A (Ill health pension on early retirement), 2008 regulation 52 or 2008 regulation 182 (Early retirement on ill-health: active members and non-contributing members)] before the transition date;
  - (c) whose Form AW33 [<sup>F28</sup>(or such other form as the Department accepted)] and supporting medical evidence [<sup>F29</sup>(“the member’s application for ill-health pension”)] was received by the Department before the transition date; and
  - (d) whose ill-health pension has not become payable under the 1995 Section or the 2008 Section before the transition date.
- (2) [<sup>F30</sup>For the purposes of paragraph (1), “the application period” in relation to a member is the period which ends with the day on which—]
- (a) the member withdraws the application for ill-health pension; or
  - (b) the Department determines that there is no entitlement to [<sup>F31</sup>an] ill-health pension [<sup>F32</sup>in respect of that application] and that determination has become final and binding.
- (3) [<sup>F33</sup>For the purposes of paragraph (2)(b), a determination becomes final and binding when—]
- (a) the determination may not be the subject of further challenge by the member—
    - (i) pursuant to dispute resolution arrangements made and implemented under Article 50 of the Pensions (Northern Ireland) Order 1995(9);

(9) [S.I. 1995/3213 \(N.I. 22\)](#); Article 50 was substituted by Article 250(1) of the Pensions (Northern Ireland) Order 2005 ([S.I. 2005/255 \(N.I. 1\)](#))



- (ii) by way of a complaint to the Pensions Ombudsman pursuant to Part X of the Pension Schemes (Northern Ireland) Act 1993(10); or
- [<sup>F34</sup>(iii) by proceedings before a court or tribunal;] or
- (b) <sup>F35</sup>... the member has indicated in writing that—
  - (i) the application for ill-health pension is withdrawn; or
  - (ii) the determination is accepted by the member as being final and binding and any right to further challenge is waived.
- <sup>F36</sup>(4) .....
- <sup>F36</sup>(5) .....
- <sup>F36</sup>(6) .....
- [<sup>F37</sup>(7) Where this regulation applies—
  - (a) the member's application for ill-health pension is considered in accordance with paragraph (8) or (9) (whichever is relevant); and
  - (b) the member's benefits, if any, are paid in accordance with paragraph (10) and the further provisions referred to in that paragraph (whichever are relevant).
- (8) If the member was in pensionable employment in the 1995 Section on 31st March 2022, the member's application for ill-health pension is considered—
  - (a) as an application for ill-health pension for the purposes of 2015 regulation 89 (Entitlement to ill-health pension); and
  - (b) as if it were also an application for ill-health pension for the purposes of 1995 regulation 13A.
- (9) If the member was an active member of the 2008 Section on 31st March 2022, the member's application for ill-health pension is considered—
  - (a) as an application for ill-health pension for the purposes of 2015 regulation 89; and
  - (b) as if it were also an application for ill-health pension for the purposes of 2008 regulation 52 or 2008 regulation 182.
- (10) The member's benefits will be paid in accordance with—
  - (a) paragraph (13) if, as a result of consideration under paragraph (8), the member satisfies the tier 1 condition or the tier 2 condition for the purposes of paragraph (2)(b)(i) or (ii) of 1995 regulation 13A (together "the 1995 regulation 13A ill-health conditions") but does not satisfy the Tier 1 condition or the Tier 2 condition for the purposes of paragraph (2)(c) or (3)(b) of 2015 regulation 89 (together "the 2015 regulation 89 ill-health conditions");
  - (b) paragraph (14) if, as a result of consideration under paragraph (9), the member satisfies the condition at paragraph (2)(a) or (3)(a) of 2008 regulation 52 or 2008 regulation 182 (together "the 2008 ill-health conditions") but does not satisfy either of the 2015 regulation 89 ill-health conditions;
  - (c) paragraph (16) if—
    - (i) as a result of—
      - (aa) consideration under paragraph (8), the member satisfies one or both of the 1995 regulation 13A ill-health conditions and one or both of the 2015 regulation 89 ill-health conditions; or

- (bb) consideration under paragraph (9), the member satisfies one or both of the 2008 ill-health conditions and one or both of the 2015 regulation 89 ill-health conditions; and
- (ii) the annual rate of ill-health pension to which the member would have been entitled under 1995 regulation 13A, 2008 regulation 52 or 2008 regulation 182 if the member had retired from pensionable employment or ceased HSC employment on 31st March 2022 is, subject to paragraphs (11) and (12), greater than the annual rate of ill-health pension to which the member is entitled under paragraph (3)(a) or (4) of regulation 28 (Ill health benefits: members below old scheme normal pension age) as at the date the member ceased HSC employment for the purposes of the 2015 Regulations (“the pension comparison calculation”);
- (d) regulation 28(3) or (4) if—
- (i) sub-paragraph (c)(i)(aa) or (bb) applies to the member; and
  - (ii) the annual rate of ill-health pension payable to the member under regulation 28(3) (a) or (4) is greater than the annual rate of ill-health pension to which the member would have been entitled under 1995 regulation 13A, 2008 regulation 52 or 2008 regulation 182, as determined in accordance with the pension comparison calculation, if the member had retired from pensionable employment or ceased HSC employment on 31st March 2022.
- (11) If the member was in pensionable employment in the 1995 Section on 31st March 2022, for the purposes of the pension comparison calculation, the pensions (“P”) under—
- (a) 1995 regulation 13A; and
  - (b) regulation 28(3)(a)(ii),
- are each increased by the amount found by applying the formula—
- $$\frac{(F - P)}{A}$$
- (12) If the member was an active member of the 2008 Section on 31st March 2022 who is entitled to a lump sum (“LS”) under regulation 28(3)(b)(ii) or (iii), for the purposes of the pension comparison calculation, the pensions under—
- (a) 2008 regulation 52 or 2008 regulation 182; and
  - (b) regulation 28(3)(a)(ii),
- are each increased by the amount found by applying the formula—
- $$\frac{A}{A + B}$$
- (13) Where this paragraph applies to the member (see paragraph (10)(a)), the annual rate of ill-health pension and the lump sum payable from the new scheme is equal to—
- (a) either—
- (i) if the member satisfies the tier 1 condition in paragraph (2)(b)(i) of 1995 regulation 13A, the tier 1 ill-health pension the member would have been entitled to under that regulation if the member had retired from pensionable employment on 31st March 2022; or
  - (ii) if the member satisfies the tier 2 condition in paragraph (2)(b)(ii) of 1995 regulation 13A, the tier 2 ill-health pension the member would have been entitled to under that regulation if the member had retired from pensionable employment on 31st March 2022; and

- (b) the lump sum to which the member would have been entitled under regulation 17 (Lump sum on retirement) of the 1995 Regulations as a consequence of becoming entitled to the payment of one of those pensions.
- (14) Where this paragraph applies to the member (see paragraph (10)(b)), the annual rate of ill-health pension and the lump sum payable from the new scheme is equal to—
  - (a) if the member satisfies the tier 1 condition in paragraph (2)(a) of 2008 regulation 52 or 2008 regulation 182, the tier 1 ill-health pension the member would have been entitled to under whichever of those regulations applies to the member if the member had ceased to be employed in HSC employment on 31st March 2022; or
  - (b) if the member satisfies the tier 2 condition in paragraph (3)(a) of 2008 regulation 52 or 2008 regulation 182, the tier 2 ill-health pension the member would have been entitled to under whichever of those regulations applies to the member if the member had ceased to be employed in HSC employment on 31st March 2022.
- (15) On the payment of a pension to a member in accordance with paragraph (13) or (14), all rights in respect of that member under the old scheme are extinguished.
- (16) Where this paragraph applies to the member (see paragraph (10)(c))—
  - (a) the annual rate of ill-health pension payable from the new scheme under regulation 28 is increased by an amount equal to the difference between the annual rate of the member's ill-health pension under 1995 regulation 13A, 2008 regulation 52 or 2008 regulation 182 and the annual rate of the member's ill-health pension under regulation 28(3)(a) or (4), determined in accordance with the pension comparison calculation; and
  - (b) that increase is applied to the member's ill-health pension under regulation 28 after the calculation of the Tier 2 addition (if any) in accordance with paragraph (4)(b) of that regulation.
- (17) Paragraphs (18) and (19) apply if a member receiving an ill-health pension under paragraph (10)(a) or (b) dies ("the deceased member").
- (18) If a surviving adult dependant of the deceased member is entitled to a pension in accordance with regulation 115 (Amount of pension: survivor of pensioner member) of the 2015 Regulations, the annual rate of the adult survivor pension payable under paragraph (4)(a) of that regulation is—
  - (a) 50% of the pension to which the member was entitled at the date of death (disregarding any additional pension) if the member was receiving a pension under paragraph (13) of this regulation on that date; and
  - (b) 37.5% of the pension to which the member was entitled at the date of death (disregarding any additional pension) if the member was receiving a pension under paragraph (14) of this regulation on that date.
- (19) If a child's pension becomes payable in respect of an eligible child of the deceased member in accordance with regulation 123 (Amount of child pension: deceased pensioner member) of the 2015 Regulations, the basic death pension for the purposes of paragraph (3)(a) of that regulation is—
  - (a) 100% of the pension to which the member was entitled at the date of death (disregarding any additional pension) if the member was receiving a pension under paragraph (13) of this regulation on that date; and
  - (b) 75% of the pension to which the member was entitled at the date of death (disregarding any additional pension) if the member was receiving a pension under paragraph (14) of this regulation on that date.
- (20) For the purposes of the 2015 Regulations—

- (a) a member's pension entitlement under the new scheme that is equivalent to entitlement to one of the following pensions is treated as if it were entitlement to an ill-health pension at Tier 1 under 2015 regulation 89—
    - (i) a tier 1 pension under 1995 regulation 13A referred to in paragraph (13)(a)(i);
    - (ii) a tier 1 pension under 2008 regulation 52 or 2008 regulation 182 referred to in paragraph (14)(a);
  - (b) a member's pension entitlement under the new scheme that is equivalent to entitlement to one of the following pensions is treated as if it were entitlement to an ill-health pension at Tier 2 under 2015 regulation 89—
    - (i) a tier 2 pension under 1995 regulation 13A referred to in paragraph (13)(a)(ii);
    - (ii) a tier 2 pension under 2008 regulation 52 or 2008 regulation 182 referred to in paragraph (14)(b);
    - (iii) a pension under regulation 28 that is increased in accordance with paragraph (16) by an amount equal to the difference between the annual rate of the ill-health pension payable under regulation 28(3)(a) and the annual rate of the member's tier 2 ill-health pension under 1995 regulation 13A, 2008 regulation 52 or 2008 regulation 182 as determined in accordance with the pension comparison calculation.
- (21) In this regulation—
- “1995 regulation 13A” means regulation 13A of the 1995 Regulations;
  - “1995 regulation 13A ill-health conditions” has the meaning given in paragraph (10)(a);
  - “2008 regulation 52” means regulation 52 of the 2008 Regulations;
  - “2008 regulation 182” means regulation 182 of the 2008 Regulations;
  - “2015 regulation 89” means regulation 89 of the 2015 Regulations;
  - “the 2008 ill-health conditions” has the meaning given in paragraph (10)(b);
  - “the 2015 regulation 89 ill-health conditions” has the meaning given in paragraph (10)(a);
  - “the deceased member” has the meaning given in paragraph (17);
  - “the member's application for ill-health pension” has the meaning given in paragraph (1)(c);
  - “the pension comparison calculation” has the meaning given in paragraph (10)(c)(ii).]

- F19** Words in [reg. 27\(1\)](#) inserted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(6)(a)(i)**
- F20** Words in [reg. 27\(1\)\(a\)](#) substituted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(6)(a)(ii)(aa)**
- F21** Word in [reg. 27\(1\)\(a\)\(i\)](#) inserted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(6)(a)(ii)(bb)**
- F22** Words in [reg. 27\(1\)\(a\)\(i\)](#) substituted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(6)(a)(ii)(bb)**
- F23** [Reg. 27\(1\)\(a\)\(i\)\(aa\)](#) omitted (1.4.2022) by virtue of [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(6)(a)(ii)(bb)**
- F24** [Reg. 27\(1\)\(a\)\(i\)\(bb\)](#) omitted (1.4.2022) by virtue of [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(6)(a)(ii)(bb)**
- F25** Words in [reg. 27\(1\)\(a\)\(ii\)](#) omitted (1.4.2022) by virtue of [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(6)(a)(ii)(cc)**
- F26** Word in [reg. 27\(1\)\(b\)](#) substituted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(6)(a)(iii)(aa)**
- F27** Words in [reg. 27\(1\)\(b\)](#) substituted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(6)(a)(iii)(bb)**

- F28** Words in [reg. 27\(1\)\(c\)](#) inserted (1.4.2022) by The Health and Social Care Pension Schemes (Amendment) Regulations (Northern Ireland) 2022 (S.R. 2022/156), regs. 1(2), **5(6)(a)(iv)(aa)**
- F29** Words in [reg. 27\(1\)\(c\)](#) inserted (1.4.2022) by The Health and Social Care Pension Schemes (Amendment) Regulations (Northern Ireland) 2022 (S.R. 2022/156), regs. 1(2), **5(6)(a)(iv)(bb)**
- F30** Words in [reg. 27\(2\)](#) substituted (1.4.2022) by The Health and Social Care Pension Schemes (Amendment) Regulations (Northern Ireland) 2022 (S.R. 2022/156), regs. 1(2), **5(6)(b)(i)**
- F31** Word in [reg. 27\(2\)\(b\)](#) inserted (1.4.2022) by The Health and Social Care Pension Schemes (Amendment) Regulations (Northern Ireland) 2022 (S.R. 2022/156), regs. 1(2), **5(6)(b)(ii)(aa)**
- F32** Words in [reg. 27\(2\)\(b\)](#) substituted (1.4.2022) by The Health and Social Care Pension Schemes (Amendment) Regulations (Northern Ireland) 2022 (S.R. 2022/156), regs. 1(2), **5(6)(b)(ii)(bb)**
- F33** Words in [reg. 27\(3\)](#) substituted (1.4.2022) by The Health and Social Care Pension Schemes (Amendment) Regulations (Northern Ireland) 2022 (S.R. 2022/156), regs. 1(2), **5(6)(c)(i)**
- F34** [Reg. 27\(3\)\(a\)\(iii\)](#) substituted (1.4.2022) by The Health and Social Care Pension Schemes (Amendment) Regulations (Northern Ireland) 2022 (S.R. 2022/156), regs. 1(2), **5(6)(c)(ii)**
- F35** Word in [reg. 27\(3\)\(b\)](#) omitted (1.4.2022) by virtue of The Health and Social Care Pension Schemes (Amendment) Regulations (Northern Ireland) 2022 (S.R. 2022/156), regs. 1(2), **5(6)(c)(iii)**
- F36** [Reg. 27\(4\)-\(6\)](#) omitted (1.4.2022) by virtue of The Health and Social Care Pension Schemes (Amendment) Regulations (Northern Ireland) 2022 (S.R. 2022/156), regs. 1(2), **5(6)(d)**
- F37** [Reg. 27\(7\)-\(21\)](#) inserted (1.4.2022) by The Health and Social Care Pension Schemes (Amendment) Regulations (Northern Ireland) 2022 (S.R. 2022/156), regs. 1(2), **5(6)(e)**

#### Commencement Information

- I25** [Reg. 27](#) in operation at 1.4.2015, see [reg. 1\(1\)](#)

### Ill health benefits: members below old scheme normal pension age

- 28.—**(1) This regulation applies in relation to a transition member who—
- becomes entitled to an ill-health pension under the new scheme; and
  - has not reached the old scheme normal pension age.
- (2) If this regulation applies—
- an ill-health pension and lump sum are not payable under the old scheme;
  - an ill health pension is payable under the new scheme in accordance with this regulation; and
  - the member becomes a deferred member of the old scheme (but no entitlement to a pension arises under—
    - regulation 49(3) of the 1995 Regulations; or
    - regulations 48, 54, 179 and 184 of the 2008 regulations,
by virtue of becoming a deferred member pursuant to this regulations).
- (3) If the member meets the Tier 1 conditions set out in regulation 89 (entitlement to ill-health pension) of the 2015 Regulations—
- the annual rate of ill-health pension payable under the new scheme is the sum of—
    - the annual rate of a Tier 1 ill-health pension payable under the new scheme; and
    - the annual rate of earned pension that would, if the member was entitled to payment of an ill-health pension under the old scheme, be payable to the member at the old scheme normal pension age; and
  - the member is entitled to payment of a lump sum of the amount of the lump sum (if any) which would, had the member been entitled to payment of an ill-health pension under the old scheme, be payable to the member under—

- (i) regulation 17 (Lump sum on retirement) of the 1995 Regulations;
- (ii) regulation 136L (Amount of pension and lump sum to be paid to a 2008 Section Optant) of the 2008 Regulations; or
- (iii) regulation 260K (Amount of pension and lump sum to be paid to a 2008 Section Optant) of the 2008 Regulations.

(4) If the member meets the Tier 2 conditions set out in regulation 89 (Entitlement to ill-health pension) of the 2015 Regulations, the annual rate of ill-health pension and lump sum payable under the new scheme is the sum of—

- (a) the amounts specified at paragraph (3); and
- (b) the annual rate of a Tier 2 addition payable under the new scheme.

(5) If, after the ill-health pension becomes payable under this regulation, a transfer payment is made from the old scheme in respect of the member's rights under that scheme, the scheme manager must deduct from the amount of ill-health pension payable under this regulation in respect of service in the old scheme an amount which is equal to the value of the pension represented by that transfer payment.

(6) The amount of pension payable under this regulation which represents the amount that would have been payable under the old scheme is subject to the same conditions, and ceases to be payable in the same circumstances, as the pension to which the member would have been entitled under the old scheme in accordance with whichever of the 1995 Regulations or the 2008 Regulations are applicable.

[<sup>F38</sup>(6A) Paragraphs (6B) and (6C) apply if a member receiving an ill health pension under this regulation dies before reaching old scheme normal pension age.

(6B) If a surviving adult dependant of the member is entitled to a pension in accordance with regulation 115 (Amount of pension: survivor of pensioner member) of the 2015 Regulations the annual rate of the adult survivor pension payable under paragraph (4)(a) of that regulation is—

- (a) if the member was in pensionable employment in the 1995 Section before becoming an active member of the new scheme, the sum of—
  - (i) 33.75% of the pension to which the member was entitled at the date of death (disregarding any additional pension) under the new scheme;
  - (ii) 16.25% of the amount (if any) by which that pension has been increased in accordance with regulation 27(16); and
  - (iii) 16.25% of the old scheme pension to which the member was entitled at the date of death in accordance with paragraph (3)(a)(ii) of this regulation; or
- (b) if the member was an active member of the 2008 Section before becoming an active member of the new scheme, the sum of—
  - (i) 33.75% of the pension to which the member was entitled at the date of death (disregarding any additional pension) under the new scheme;
  - (ii) 3.75% of the amount (if any) by which that pension has been increased in accordance with regulation 27(16); and
  - (iii) 3.75% of the old scheme pension to which the member was entitled at the date of death in accordance with paragraph (3)(a)(ii) of this regulation.

(6C) If a child's pension becomes payable in respect of an eligible child of the member in accordance with regulation 123 (Amount of child pension: deceased pensioner member) of the 2015 Regulations the basic death pension for the purposes of paragraph (3)(a) of that regulation is—

- (a) if the member was in pensionable employment in the 1995 Section before becoming an active member of the new scheme, the sum of—

- (i) 67.5% of the deceased member's annual pension (disregarding any additional pension) under the new scheme;
    - (ii) 32.5% of the amount (if any) by which that pension has been increased in accordance with regulation 27(16); and
    - (iii) 32.5% of the old scheme pension to which the member was entitled at the date of death in accordance with paragraph (3)(a)(ii) of this regulation; or
  - (b) if the member was an active member of the 2008 Section before becoming an active member of the new scheme, the sum of—
    - (i) 67.5% of the deceased member's annual pension (disregarding any additional pension) under the new scheme;
    - (ii) 7.5% of the amount (if any) by which that pension has been increased in accordance with regulation 27(16); and
    - (iii) 7.5% of the old scheme pension to which the member was entitled at the date of death in accordance with paragraph (3)(a)(ii) of this regulation.]
- (7) In this regulation and regulation 29—
- (a) a reference to the annual rate of earned pension payable under the old scheme means the annual pension payable under the following provisions—
    - (i) if the member was an active member of the 1995 Section before becoming an active member of the new scheme, regulation 12 of that Section;
    - (ii) if the member was an active member of the 2008 Section before becoming an active member of the new scheme, regulation 45 or 176 of that Section;
  - (b) a reference to an ill-health pension payable under the old scheme means a pension payable under the following provisions—
    - (i) if the member was an active member of the 1995 Section before becoming an active member of the new scheme, regulation 13A of that Section;
    - (ii) if the member was an active member of the 2008 Section before becoming an active member of the new scheme, regulation 52 or 182 of that Section;
  - (c) a reference to an ill-health pension payable under the new scheme means an ill-health pension payable under regulation 89 of the 2015 Regulations;
  - (d) a reference to the old scheme normal pension age means—
    - (i) as regards the 1995 Section, normal benefit age under the 1995 Regulations; or
    - (ii) as regards the 2008 Section, the age specified in regulation 45 or 176 (normal retirement pensions) of the 2008 Regulations.

**F38** Reg. 28(6A)-(6C) inserted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(7)**

#### **Commencement Information**

**I26** Reg. 28 in operation at 1.4.2015, see [reg. 1\(1\)](#)

### **Ill health benefits: members above old scheme normal pension age**

**29.—**(1) This regulation applies in relation to a transition member who is receiving payment of an ill-health pension in accordance with regulation 28.

(2) When the member reaches the old scheme normal pension age—

- (a) the benefits payable under regulation 28 in respect of service in the old scheme cease to be payable under the new scheme; and
  - (b) the member becomes entitled to the immediate payment of the annual rate of earned pension payable under the old scheme in accordance with the Regulations of the applicable Section; and
  - (c) no lump sum is payable to the member under those Regulations.
- (3) In calculating the annual rate of earned pension payable under the old scheme for the purposes of paragraph (2)(b), the following are subtracted—
- (a) the amount of pension amount (if any) converted to lump sum under regulation 76 of the 2015 Regulations to the extent that it relates to the pension payable under regulation 28(3)(a)(ii); and
  - (b) an amount equal to any transfer payment made to another scheme before the member reached the old scheme normal pension age.
- (4) Before the amounts in paragraph (3)(a) and (b) are subtracted they must be increased by the amount by which the annual rate of pension of that amount would have been increased under the Pensions (Increase) Act (Northern Ireland) 1971(11) if—
- (a) that pension was eligible to be so increased; and
  - (b) the beginning date for that pension was the date that ill-health pension became payable under the new scheme.

#### Commencement Information

**I27** Reg. 29 in operation at 1.4.2015, see [reg. 1\(1\)](#)

### Age retirement of mental health officers, nurses, physiotherapists, midwives and health visitors

**30.**—(1) In regulation 75 of the 1995 Regulations, references to “superannuable employment” in paragraphs (1)(b), (2) and (3)(b) includes employment that qualified the 1995 officer transition member for benefits under the 2015 Regulations.

- (2) In regulation 76 of the 1995 Regulations, references to—
- (a) “superannuable employment” in paragraphs (2), (5)(a) and (9) includes employment that qualified the member for benefits under the 2015 Regulations; and
  - (b) “superannuable service” in paragraph (5)(a) includes service that qualified the member for benefits under the 2015 Regulations.

#### Commencement Information

**I28** Reg. 30 in operation at 1.4.2015, see [reg. 1\(1\)](#)

### Partial Retirement

**31.**—(1) Where a transition member elects to claim a specified percentage of that member’s pension pursuant to regulation 83 of the 2015 Regulations, that election is to be treated as also being an option for the purposes of partial retirement pension pursuant to whichever of regulations 49 or 180 of the 2008 Regulations applies to the member.

(11) [1972 c.35 \(N.I.\)](#)



(2) A transition member does not become entitled to a specified percentage of a pension under regulation 83 of the 2015 Regulations until the member has become entitled to and claimed all benefits in the 2008 Section.

(3) For the purposes of regulation 49(6) and 180(5) of the 2008 Regulations and regulation 83(5) of the 2015 Regulations—

- (a) the pension (other than additional pension) to which the member becomes entitled as a result of the option or election (before converting pension to lump sum) is not to be less than the amount of pension payable by reference to 20% of the aggregate of the member's pensionable service under the 2008 Regulations and the 2015 Regulations at the end of the option day; and
- (b) the percentage of pension (other than additional pension) for which the member does not require immediate payment is not to be less than the amount of the pension payable by reference to 20% of the aggregate of the member's pensionable service under the 2008 Regulations and the 2015 Regulations at the end of the option day.

#### Commencement Information

**I29** Reg. 31 in operation at 1.4.2015, see [reg. 1\(1\)](#)

### Redundancy retirement

**32.**—(1) This regulation applies where an officer transition member other than one to whom regulation 33 applies—

- (a) becomes entitled to payment of a premature retirement pension pursuant to regulation 81 of the 2015 Regulations;
- (b) claims that pension; and
- (c) is under—
  - (i) age 60, in the case of a member of the 1995 Section; or
  - (ii) age 65, in the case of a member of the 2008 Section.

(2) Where this regulation applies, the member also becomes entitled to payment of a pension in respect of relevant pensionable service in the old scheme in consideration of the termination of that member's employment by reason of redundancy pursuant to regulation —

- (a) 14A of the 1995 Regulations<sup>(12)</sup>; or
- (b) 55 of the 2008 Regulations.

(3) In this regulation, “relevant pensionable service” does not include—

- (a) service from an employment that commenced when the member was eligible to be an active member of the old scheme and is a continuing employment in respect of which the member has elected to continue to accrue rights pursuant to regulation 99(5) of the 2015 Regulations;
- (b) if regulation 99(9) of the 2015 Regulations applies to the member—
  - (i) service to which Schedule 2 to the 1995 Regulations applies; or
  - (ii) service to which Part 3 of the 2008 Regulations applies.

<sup>(12)</sup> Regulation 14A was inserted by [S.R. 2008 No.96](#) and amended by [S.R. 2013 Nos. 40 and 259](#)

#### Commencement Information

**I30** Reg. 32 in operation at 1.4.2015, see [reg. 1\(1\)](#)

#### Premature retirement: special classes

**33.**—(1) This regulation applies where an 1995 officer transition member to whom regulation 75 or 76 of the 1995 Regulations applies in respect of service in that Section—

- (a) becomes entitled to payment of a premature retirement pension—
  - (i) pursuant to regulation 80 of the 2015 Regulations; or
  - (ii) on grounds of redundancy pursuant to regulation 81 of the 2015 Regulations; and
- (b) claims that pension.

(2) Where this regulation applies, for the purposes of regulation 14C(2) and (3) of the 1995 Regulations**(13)**—

- (a) the member is to be treated as having claimed payment of a pension under regulation 12 of those Regulations; and
- (b) in the case of a member to who regulation 75(4)(b) of the 1995 Regulations applies, is also entitled to a pension under regulation 16 of the 1995 Regulations if that member makes a claim for it.

#### Commencement Information

**I31** Reg. 33 in operation at 1.4.2015, see [reg. 1\(1\)](#)

#### Interests of efficiency of the service

**34.** Where an officer transition member other than one entitled to a pension pursuant to regulation 75 or 76 of the 1995 Regulations in respect of service in that Section becomes entitled to payment of a premature retirement pension pursuant to regulation 80 of the 2015 Regulations and claims that pension—

- (a) the member at the same time becomes eligible to a pension under whichever of regulations 14A of the 1995 Regulations or 55 of the 2008 Regulations applies to the member in relation to the termination of that member's employment in the interests of efficiency of the service in which the member is employed; and
- (b) the member's employing authority must make a contribution to the Department in respect of the cost of that pension in accordance with regulation 11 of the 1995 Regulations or 32 of the 2008 Regulations.

#### Commencement Information

**I32** Reg. 34 in operation at 1.4.2015, see [reg. 1\(1\)](#)

**(13)** Regulation 14C was inserted by [S.R. 2008 No.96](#)

### Variations to lump sums for 1995 and 2008 pensioners joining the new scheme

**35.**—(1) This regulation applies to persons falling in Groups 1 to 4 [<sup>F39</sup>, 6 and 7] in the table at paragraph 1 of Schedule 1 and Groups 1 to 4 [<sup>F40</sup>, 6 and 7] in the table at paragraph 2 of Schedule 1.

(2) Where this regulation applies, a lump sum equal to five times the rate of the relevant pension is to be paid in place of the lump sum payable to active members under regulation 111(a) and paragraph 2 of Schedule 12 to the 2015 Regulations.

(3) In this regulation, the “relevant pension” means—

- (a) where the member has not taken partial retirement from the new scheme pursuant to regulation 83 of the 2015 Regulations, an amount equal to—
  - (i) if the member dies before reaching normal pension age in the new scheme, a tier 2 IHP within the meaning of regulation 89 of the 2015 Regulations;
  - (ii) if the member dies on or after reaching normal pension age in the new scheme, a pension under regulation 72 of the 2015 Regulations;
- (b) where the member has taken partial retirement from the new scheme pursuant to regulation 83 of the 2015 Regulations, an amount determined by the scheme manager after taking advice from the scheme actuary.

**F39** Words in [reg. 35\(1\)](#) substituted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(8)(a)**

**F40** Words in [reg. 35\(1\)](#) inserted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(8)(b)**

#### Commencement Information

**I33** Reg. 35 in operation at 1.4.2015, see [reg. 1\(1\)](#)

### Abatement

**36.**—(1) This regulation applies to an officer transition member who is—

- (a) a pensioner member of the new scheme to whom regulation 100(1) of the 2015 Regulations applies in respect of a pension under regulation 80 of those Regulations; and
- (b) a pensioner member of—
  - (i) the 1995 Section to whom regulation 85 of the 1995 Regulations applies in respect of a relevant pension referred to at paragraph (1A)(b)(ii) of that regulation(**14**); or
  - (ii) the 2008 Section to whom regulation 115 applies in respect of a pension referred to at paragraph (1)(c)(iii) of that regulation.

(2) In respect of a member to whom paragraph (1)(b)(i) applies, for the purposes of—

- (a) establishing whether the pensioner’s relevant income for a scheme year exceeds their previous earnings for the purposes of that regulation 102 of the 2015 Regulations; and
- (b) finding amount B in paragraph (3D) of regulation 85 of the 1995 Regulations(**15**),

the enhancement amount for the purposes of regulation 103(2) of the 2015 Regulations is the aggregate of the amounts found under that regulation and amount B found under regulation 85(3D) of the 1995 Regulations.

(14) Paragraph (1A) was inserted by [S.R. 2005 No.155](#) regulation 8; amended by [S.R. 2008 No.163](#) regulation 57 and [S.R. 2012 No.42](#) regulation 7

(15) Paragraph (3D) was inserted by [S.R. 2008 No.163](#) regulation 57(3)

(3) For the purposes of paragraph (2), the amount B found under regulation 85(3D) of the 1995 Regulations is the aggregate of the amount found under that paragraph and the amount found under regulation 103(2) of the 2015 Regulations.

(4) Where the pensioner's relevant income exceeds their previous pay or earnings, the amount of any reduction that is to apply to the pensions payable under each of the 1995 Regulations and 2015 Regulations is equal to the same proportion of the excess as the amount of pension for the scheme year before the reduction bears to the sum of those pensions for that year before the reduction.

(5) For the purposes of paragraph (4), the excess in the 1995 Section is equal to amount B found under regulation 85(3D) of the 1995 Regulations.

(6) In respect of a member to whom paragraph (1)(b)(ii) applies, for the purposes of—

- (a) establishing whether the pensioner's relevant income for a scheme year exceeds their previous earnings for the purposes of regulation 102 of the 2015 Regulations; and
- (b) establishing whether the pensioner's relevant income for a financial year exceeds their previous pay for the purposes of regulation 117 of the 2008 Regulations,

the enhancement amount for the purposes of regulation 118(2) of the 2008 Regulations and regulation 103(2) of the 2015 Regulations is the aggregate of the amounts found under each of those regulations.

(7) Where the pensioner's relevant income exceeds their previous pay or earnings, the amount of any reduction that is to apply to the pensions payable under each of the 2008 Regulations and 2015 Regulations is equal to the same proportion of the excess as the amount of pension for the scheme year before the reduction bears to the sum of those pensions for that year before the reduction.

#### Commencement Information

**I34** Reg. 36 in operation at 1.4.2015, see [reg. 1\(1\)](#)

#### Abatement: special classes

**37.—**(1) This regulation applies to a 1995 officer transition member who is—

- (a) a pensioner member of the new scheme to whom regulation 100(1) of the 2015 Regulations applies in respect of a pension under regulation 80 of those Regulations; and
- (b) a pensioner member of the 1995 Section to whom regulation 85 of the 1995 Regulations applies in respect of a relevant pension referred to in paragraph (1A)(c)(i) of that regulation.

(2) Where this regulation applies, the pensions mentioned in paragraph (1)(a) and (b) must be reduced by the relevant amount.

(3) The “relevant amount” in paragraph (2) is the amount determined by multiplying the relevant proportion by amount E determined under paragraph (5).

(4) The “relevant proportion” in paragraph (3) is—

(a)

in respect of the pension at paragraph (1)(a), represented by the fraction

$$\frac{A}{A+B}; \text{ and}$$

(b)

in respect of the pension at paragraph (1)(b), represented by the fraction

$$\frac{B}{A+B},$$

where A and B have the meanings given in paragraph (5).

(5) Amount E is the amount by which the sum of amounts A, B and C exceeds amount D, where amount—

“A” is the amount of the enhancement under regulation 103(2) of the 2015 Regulations;

“B” is the amount of the member’s relevant pension from the 1995 Section (including in that amount any amount by which that pension has been reduced pursuant to an option under regulation 17A);

“C” is the amount of earnings received by the employed person during the year from the new employment in accordance with regulation 103(1)(a) of the 2015 Regulations; and

“D” is the amount of the member’s previous earnings construed in accordance with regulation 104 of the 2015 Regulations.

#### Commencement Information

**I35** Reg. 37 in operation at 1.4.2015, see [reg. 1\(1\)](#)

## CHAPTER 8

### Death benefits

#### Death in service

**38.**—(1) As regards a [<sup>F41</sup>transition] member, or a person who derives a benefit from the old scheme or new scheme in respect of a [<sup>F41</sup>transition] member, the entitlement listed in column 1 of the table is disapplied and the corresponding entitlement in column 2 applies instead.

**Table**

<i>Column 1</i>	<i>Column 2</i>
<i>Original entitlement</i>	<i>Revised entitlement</i>
<b>PART 1</b>	
Entitlements derived from the 1995 Section	
a lump sum on death under regulation 18.	a lump sum on death under regulation 111(a) of the 2015 Regulations.
an initial adult survivor pension under regulation 24(3B) at the rate of the member’s superannuable pay for the first six months after the member’s death.	an pension payable during the initial period at the rate of the member’s pensionable earnings under regulation 114(4) of the 2015 Regulations (and references in regulation 24(3C), (4) and (5) and 34(4B) and (4C) of the 1995 Section to paragraph (3B) are to be taken to be a reference to a pension payable under regulation 114(4) of the 2015 Regulations).
an ongoing pension under regulation 24(3C) based on one half of the member’s notional ill-health pension had the member become entitled to a tier 2 pension under regulation 13A on the date of death.	(a) payable from the 1995 Section in respect of service in that Section, an ongoing adult survivor pension equal to the pension that would have been payable to the adult survivor under Part III of the 1995 Section if the

**Changes to legislation:** There are currently no known outstanding effects for the The Health and Social Care Pension Scheme (Transitional and Consequential Provisions) Regulations (Northern Ireland) 2015, PART 2. (See end of Document for details)

<i>Column 1</i>	<i>Column 2</i>
<i>Original entitlement</i>	<i>Revised entitlement</i>
	<p>member had retired with a pension under regulation 12 of the 1995 Section on the date of death; and</p> <p>(b) payable from the 2015 Scheme in respect of service in that scheme, an ongoing survivor pension based on a Tier 2 IHP under regulation 114(5) of the 2015 Regulations.</p>
a pension under regulation 26(2A) equal to one half of the pension that would have been payable to the member had the member become entitled to a tier 2 pension under regulation 13A on the day the member left superannuable employment.	<p>(a) payable from the 1995 Section in respect of service in that Section, an ongoing adult survivor pension equal to the adult survivor under Part III of the 1995 Section if the member had retired with a pension under regulation 12 of the 1995 Section on the date of death; and</p> <p>(b) payable from the 2015 Scheme in respect of service in that scheme, an ongoing survivor pension based on a Tier 2 IHP under regulation 116(2) of the 2015 Regulations.</p>
<p>a dependant child's pension under regulation 34 equal to the rate of the member's superannuable pay when the member died, payable for the first—</p> <p>(a) three months under paragraph (4C);</p> <p>(b) six months under paragraph (4D);</p> <p>(c) six months under paragraph (4E).</p>	<p>an initial pension of the same amount and for the same duration under paragraph (6) or (7) of regulation 122 of the 2015 Regulations.</p>
an ongoing pension under regulation 34(2A) based on a proportion of the member's notional ill-health pension had the member become entitled to a tier 2 pension under regulation 13A on the date of death or, if greater, the amount that pension would have been had it been based on 10 years superannuable service.	<p>(a) payable from the 1995 Section in respect of service in that Section, an ongoing pension equal to the relevant proportion of the pension that would have been payable to the member if the member had retired with a pension under regulation 12 of the 1995 Section on the date of death; and</p> <p>(b) payable from the 2015 Scheme in respect of service in that scheme, an ongoing pension based on the appropriate fraction of the basic death pension specified under regulation 122(3) and (4) of the 2015 Regulations.</p>
a pension under regulation 36(2) equal to the relevant proportion of the pension described in regulation 34(2A).	<p>(a) payable from the 1995 Section in respect of service in that Section, a child's pension equal the relevant proportion of the pension that would have been payable to the member if the member had retired with a pension under</p>

<i>Column 1</i>	<i>Column 2</i>
<i>Original entitlement</i>	<i>Revised entitlement</i>
	<p>regulation 12 of the 1995 Section on the date of death; and</p> <p>(b) payable from the 2015 Scheme in respect of service in that scheme, an ongoing pension based on the appropriate fraction of the basic death pension specified under regulation 124(3) (a) and (4) of the 2015 Regulations.</p>
PART 2	
Entitlements derived from the 2008 Section	
a lump sum on death under regulation 83 or 210.	a lump sum on death under regulation 111(a) of the 2015 Regulations.
<p>a surviving adult dependent's pension during the initial period of six months—</p> <p>(a) under regulation 69(1)(a) equal to the rate of the member's pensionable pay at the time of death; or</p> <p>(b) under regulation 69(2)(a) equal to the rate of the member's pensionable earnings during the last complete quarter before the member's death.</p>	<p>a pension payable during the initial period at the rate of the member's pensionable earnings under regulation 114(4) of the 2015 Regulations (and references in regulations 69(2), (3) and (4) and 196(2), (3) and (4) of the 2008 Section to "after the initial period" are to be taken to be a reference to the period for which the initial pension payable under regulation 114(4) of the 2015 Regulations is payable).</p>
<p>an ongoing pension after the initial period—</p> <p>(a) under regulation 69(2)(a) equal to 37.5% of the tier 2 ill health pension under regulation 52 to which the member would have been entitled if, on the date of death, the member had become entitled to such a pension in respect of any period of pensionable service; or</p> <p>(b) under regulation 196(2)(a) equal to the appropriate proportion of the tier 2 ill health pension under regulation 182 to which the member would have been entitled if, on the date of death, the member had become entitled to such a pension.</p>	<p>(a) payable from the 2008 Section in respect of service in that Section, an ongoing adult survivor pension after the initial period equal to—</p> <p>(i) 37.5% of the pension under regulation 45 to which the member would have been entitled if, on the date of death, the member had become entitled to such a pension in respect of any period of pensionable service that the member is entitled to count; or</p> <p>(ii) equal to the appropriate proportion of the pension under regulation 176 to which the member would have been entitled if, on the date of death, the member had become entitled to such a pension in respect of any period of pensionable service that the member is entitled to count; and</p> <p>(b) payable from the 2015 Scheme in respect of service in that scheme, an ongoing</p>

**Changes to legislation:** There are currently no known outstanding effects for the The Health and Social Care Pension Scheme (Transitional and Consequential Provisions) Regulations (Northern Ireland) 2015, PART 2. (See end of Document for details)

<i>Column 1</i>	<i>Column 2</i>
<i>Original entitlement</i>	<i>Revised entitlement</i>
	survivor pension based on a Tier 2 IHP under regulation 114(5) of the 2015 Regulations.
<p>a pension under—</p> <p>(a) regulation 71(1)(a) equal to 37.5% of the tier 2 ill health pension under regulation 52 to which the member would have been entitled if on the date the member's pensionable service ceased the member had become entitled to such a pension; or</p> <p>(b) regulation 198(1)(a) equal to the appropriate proportion of the tier 2 ill health pension under regulation 182 to which the member would have been entitled if on the date the member's pensionable service ceased the member had become entitled to such a pension.</p>	<p>(a) payable from the 2008 Section in respect of service in that Section, an ongoing adult survivor pension equal to—</p> <p>(i) 37.5% of the pension under regulation 45 to which the member would have been entitled if, on the date the member's pensionable service ceased, the member had become entitled to such a pension; or</p> <p>(ii) the appropriate proportion of the pension under regulation 176 to which the member would have been entitled if, on the date the member's pensionable service ceased, the member had become entitled to such a pension; and</p> <p>(b) payable from the 2015 Scheme in respect of service in that scheme, an ongoing survivor pension based on a Tier 2 IHP under regulation 116(2) of the 2015 Regulations.</p>
<p>a dependant child's pension under—</p> <p>(a) regulation 76 equal to the rate of the deceased's pensionable pay at the date of death, payable for the first—</p> <p>(i) three months under paragraph (6)(i);</p> <p>(ii) six months under paragraph (7)(i); or</p> <p>(b) regulation 203 equal to the average rate of the deceased's pensionable earnings during the last complete quarter before the member died, payable for the first—</p> <p>(i) three months under paragraph (5)(i);</p> <p>(ii) six months under paragraph (6)(a).</p>	<p>an initial pension of the same amount and for the same duration under paragraph (6) or (7) of regulation 122 of the 2015 Regulations.</p>
<p>an ongoing pension under regulation 76(3) or 203(3) equal to the appropriate fraction of the basic death pension.</p>	<p>(a) payable from the 2008 Section in respect of service in that Section, an ongoing pension equal to the appropriate fraction of the basic death pension payable under—</p> <p>(i) regulation 76(3) of the 2008 Section; or</p>



<i>Column 1</i>	<i>Column 2</i>
<i>Original entitlement</i>	<i>Revised entitlement</i>
	<p>(ii) regulation 203(3) of the 2008 Section,</p> <p>where that pension is based on the pensionable service that the deceased was entitled to count at the date of death; and</p> <p>(b) payable from the 2015 Scheme in respect of service in that scheme, an ongoing pension based on the appropriate fraction of the basic death pension specified under regulation 122(3) and (4) of the 2015 Regulations.</p>
a pension under regulation 78(3)(a) or 205(3) (a) equal to the appropriate fraction of the basic death pension for the purposes of regulation 76 or 210 if the deceased had died on the date the deceased ceased to be an active member.	<p>(a) payable from the 2008 Section in respect of service in that Section, a pension equal to—</p> <p>(i) 37.5% of the pension under regulation 45 to which the member would have been entitled if, on the date the member's pensionable service ceased, the member had become entitled to such a pension; or</p> <p>(ii) the appropriate proportion of the pension under regulation 176 to which the member would have been entitled if, on the date the member's pensionable service ceased, the member had become entitled to such a pension; and</p> <p>(b) payable from the 2015 Scheme in respect of service in that scheme, an ongoing pension based on the appropriate fraction of the basic death pension specified under regulation 124(3) and (4) of the 2015 Regulations.</p>

(2) Save where expressly provided in the table, no entitlement in respect of the matters listed in column 1 is payable from both the 2015 Regulations and—

- (a) the 1995 Section; or
- (b) the 2008 Section,

and no entitlement in respect of the matters listed in column 1 of the table is payable twice (under the 2015 Regulations or these Regulations and either the 1995 Section or 2008 Section) in respect of the same period of service.

**F41** Word in [reg. 38\(1\)](#) substituted (1.4.2022) by [The Health and Social Care Pension Schemes \(Amendment\) Regulations \(Northern Ireland\) 2022 \(S.R. 2022/156\)](#), regs. 1(2), **5(9)**

#### **Commencement Information**

**I36** Reg. 38 in operation at 1.4.2015, see [reg. 1\(1\)](#)

## CHAPTER 9

### Option to convert service

#### Option for 1995 Section members to convert to 2008 Section membership

**39.**—(1) This regulation applies to a person who, on 31st March 2015, was in pensionable service for the purposes of the 1995 Regulations but who on 1st April 2015 is not a person to whom the following provisions apply—

- (a) paragraphs (5), (6) and, where paragraph (11) or (12) applies, paragraph (9) of regulation 8 of those Regulations<sup>(16)</sup>; or
- (b) regulation 27.

(2) A person to whom this regulation applies may give the Department a notice in writing electing that their pensionable service for the purposes of the 1995 Regulations be treated as if it were such service for the purposes of the 2008 Regulations.

(3) Paragraph (2) applies only to the extent that the person has not already received benefits under the 1995 Regulations in respect of their pensionable service for the purposes of those Regulations.

(4) For the purposes of this regulation, a notice—

- (a) includes any notice that a person may have given the Department prior to 31st March 2015;
- (b) has the same effect that a notice given pursuant to Chapter 10 of Parts 2 and 3 of the 2008 Regulations would have had prior to 31st March 2015; and
- (c) must be received by the Department before 1st July 2015.

---

#### Commencement Information

**I37** Reg. 39 in operation at 1.4.2015, see [reg. 1\(1\)](#)

---

(16) These paragraphs are inserted by paragraph 4 of Schedule 2

**Changes to legislation:**

There are currently no known outstanding effects for the The Health and Social Care Pension Scheme (Transitional and Consequential Provisions) Regulations (Northern Ireland) 2015, PART 2.