

North Yorkshire Pension Fund
LGPC Bulletins Log

Bulletin Number	Action	Response
215 – Oct 2021	Pensions Dashboards Start preparing for dashboard on-boarding by considering whether we wish to use an ISP to connect to the dashboard ecosystem, cleansing our data and ensuring we have adequate resources to prepare for the dashboard connection.	In progress – ISP provider chosen, data cleansing commenced, monthly project meetings commenced, connection date set.
218 – Dec 2021	Pensions dashboards – A to Z industry guide Review the guide and start preparing for pensions dashboards. Pensions dashboards – data matching guidance Review the accuracy of the personal data values held for all active and deferred members	In progress – as above
231 – Nov 2022	Pensions Dashboards Programme (PDP) publishes updated standards Administering authorities should consider how they will comply with the standards. We recommend discussing the standards with their software provider or third party administrator, for those funds administered externally.	In progress – as above
243 – Oct 2023	McCloud compensation cases DLUHC would like to know if administering authorities receive any applications for McCloud compensation. Send depersonalised details of each case to lgpensions@levellingup.gov.uk . Interfund transfers and the McCloud underpin Apply the approach set out by DLUHC for interfund transfers McCloud templates for member correspondence and disclosure article Include the template paragraphs within your communication to members. Use the disclosure article to inform members about the changes.	Ongoing activity Ongoing activity Complete - paragraphs being used
244 – Nov 2023	McCloud technical guide for administrators Use the McCloud technical guide to help you implement the McCloud remedy. LGPS Pensions Dashboard connection guide Review the LGPS Pensions Dashboards connection guide and start preparing to implement dashboards. Proposed staging date for public sector pension schemes Start preparing to connect to dashboards by the proposed staging date.	In progress In progress – as above Complete – as above, connection date chosen and work commenced.
246 – Jan 2024	New GAD guidance Review the new guidance and amend your processes accordingly. Discuss the changes with your pensions administration software supplier.	Ongoing
247 – Feb 2024	2024/25 Pension scheme return On 12 February 2024, HMRC published guidance for administrators preparing for the new 2024/25 pension scheme return. Review the guidance and complete the steps set out in it to prepare.	Ongoing

249 – Mar 2024	<p>Annual Report Guidance 2024 Review the new guidance and implement the new requirements when producing and publishing your Fund's Annual Report.</p> <p>Abolition of the LTA administrator guide On 22 March 2024, Jayne Wiberg emailed administering authorities about the release of an administrator guide on the 'Abolition of the LTA' and a draft 'Previous pension benefits declaration form'. Review the new guidance and amend your processes accordingly.</p> <p>Employer role training (England and Wales) Share information about the employer role training with your Scheme employers.</p>	<p>In progress</p> <p>In progress</p> <p>Completed – email sent 03/03/2024</p>
250 – Apr 2024	<p>Gender Pensions Gap – LGA virtual event on 9 May 2024 at 2pm Share the details of the event with HR professionals at your authority, as well as senior managers at local authority employers and interested LGPS officers</p> <p>'Your LGPS Contacts' database Review and update the information on 'Your LGPS contacts' website</p> <p>HMRC pension schemes newsletter 157 Ensure you are using the correct version of the HMRC forms for qualifying recognised overseas pension schemes (QROPS) transfers. Consider if you wish to volunteer to help HMRC develop the function to submit the APSS262 form on the Managing Pension Schemes service.</p> <p>LGA standard McCloud wording for 2024 annual benefit statements Consider using the standard wording in the 2024 annual benefit statements</p> <p>Impact of the abolition of the lifetime allowance on the McCloud remedy Make further enquiries if you receive a transitional tax-free amount certificate application for a member who has previous benefits in a different public service pension scheme.</p> <p>Temporary unavailability of HMRC's remedy adjustment online service If you are aware of any members who need to calculate and report an annual allowance or lifetime allowance adjustment due to the McCloud remedy to HMRC, share this article with them.</p> <p>Abolition of the lifetime allowance administrator guide Review the revised guidance and amend your processes accordingly. Let the LGA know if you have any cases where a pension commencement excess lump sum could be paid</p> <p>New page for LGPS job adverts on the LGA website Let your teams and anyone in your organisation responsible for advertising LGPS vacancies know about the new page and video www.lgpsregs.org/jobs.php.</p> <p>Employer role training (England and Wales) Share information about the employer role training with your Scheme employers. Discuss potential for commissioned training at Pension Officer Group meetings.</p>	<p>Completed – email sent 03/05/2024</p> <p>Completed – updated 01/05/2024</p> <p>Completed – correct forms being used</p> <p>In progress – part of McCloud project</p> <p>In progress – part of McCloud project</p> <p>No members affected yet</p> <p>Completed – processes reviewed and updated</p> <p>We don't have any vacancies</p> <p>Completed – email sent 03/03/2024</p>

251 – May 24	<p>LGPS England & Wales Scheme Advisory Board (SAB) Gender pensions gap research – call for volunteers. Share with employers</p> <p>LGA updates to guides factsheets and leaflets Update any local versions of the guides, factsheets and leaflets.</p> <p>Payment of pension commencement excess lump sums (PCELS) from the LGPS Review and apply the transitional arrangements set out in DLUHC's email.</p> <p>Pensions dashboards On 30 April 2024, the Pensions Dashboards Programme published version 1.2 of the data standards. Discuss the data standards with your integrated service provider to ensure your administering authority is compliant.</p> <p>Consultation on the Pensions Scams Industry Group Consider responding to the consultation.</p> <p>LGA previous pension benefits declaration form version 1.1 Review and consider using the updated form and the accompanying notes.</p> <p>LGA Employer role training (England and Wales) Share information about the employer role training with your Scheme employers. Discuss potential for commissioned training at Pension Officer Group meetings.</p>	<p>Completed – email sent 31/05/2024</p> <p>Completed – 31/05/2024</p> <p>Completed</p> <p>In progress – see above</p> <p>No capacity to respond to consultation</p> <p>Completed</p> <p>Completed - email sent 31/05/2024</p>
252 – June 24	<p>Aggregation and concurrency Review our concurrent aggregation processes to ensure they are in line with the regulations.</p> <p>TPR nudge campaign Make sure we have registered our 'key dashboards contact' and use the link within our first nudge email to nominate further contacts.</p> <p>Non-Club CETVs for members with McCloud protection Review our transfer, divorce and interfund processes to make sure our non-Club CETV calculations are correct for members with McCloud protection</p> <p>New LGPS informer document launched Share the new audit informer document (published by SAB and the Institute of Chartered Accountants in England and Wales) with Scheme employers and ask them to share it with their auditors.</p> <p>LGA Employer role training (England and Wales) Share information about the employer role training with your Scheme employers. Discuss potential for commissioned training at Pension Officer Group meetings.</p>	<p>Completed</p> <p>Completed</p> <p>Completed</p> <p>Completed – email sent 28/06/2024</p> <p>Completed – email sent 31/05/2024</p>