



Government  
Actuary's  
Department

# Matthews remedy exercise

FPS Coffee Morning

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# Agenda

## Manual cases

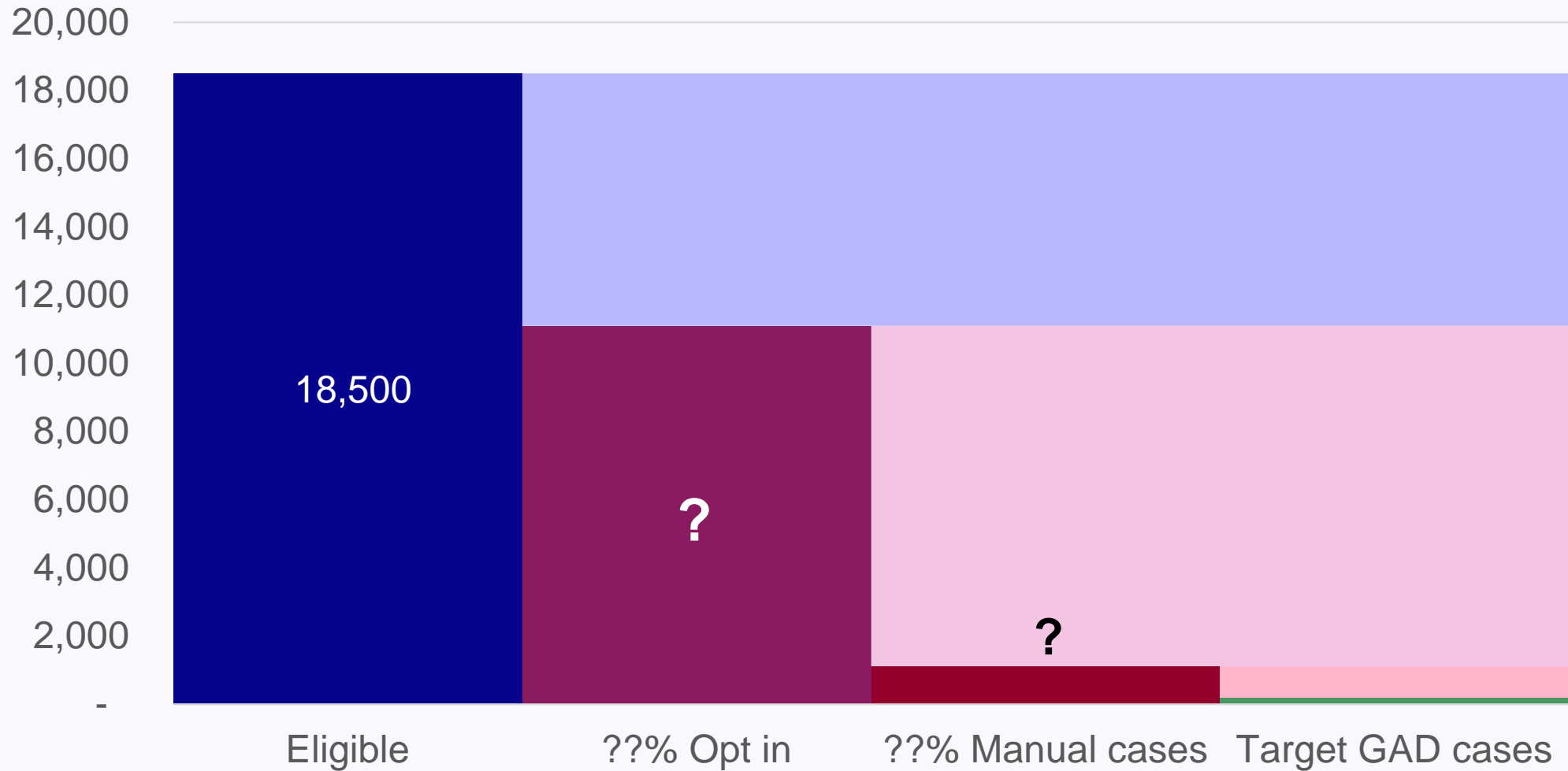
- Update
- On hand

## Calculator outputs

- Demo
- Q&A



# Matthews exercise (England)

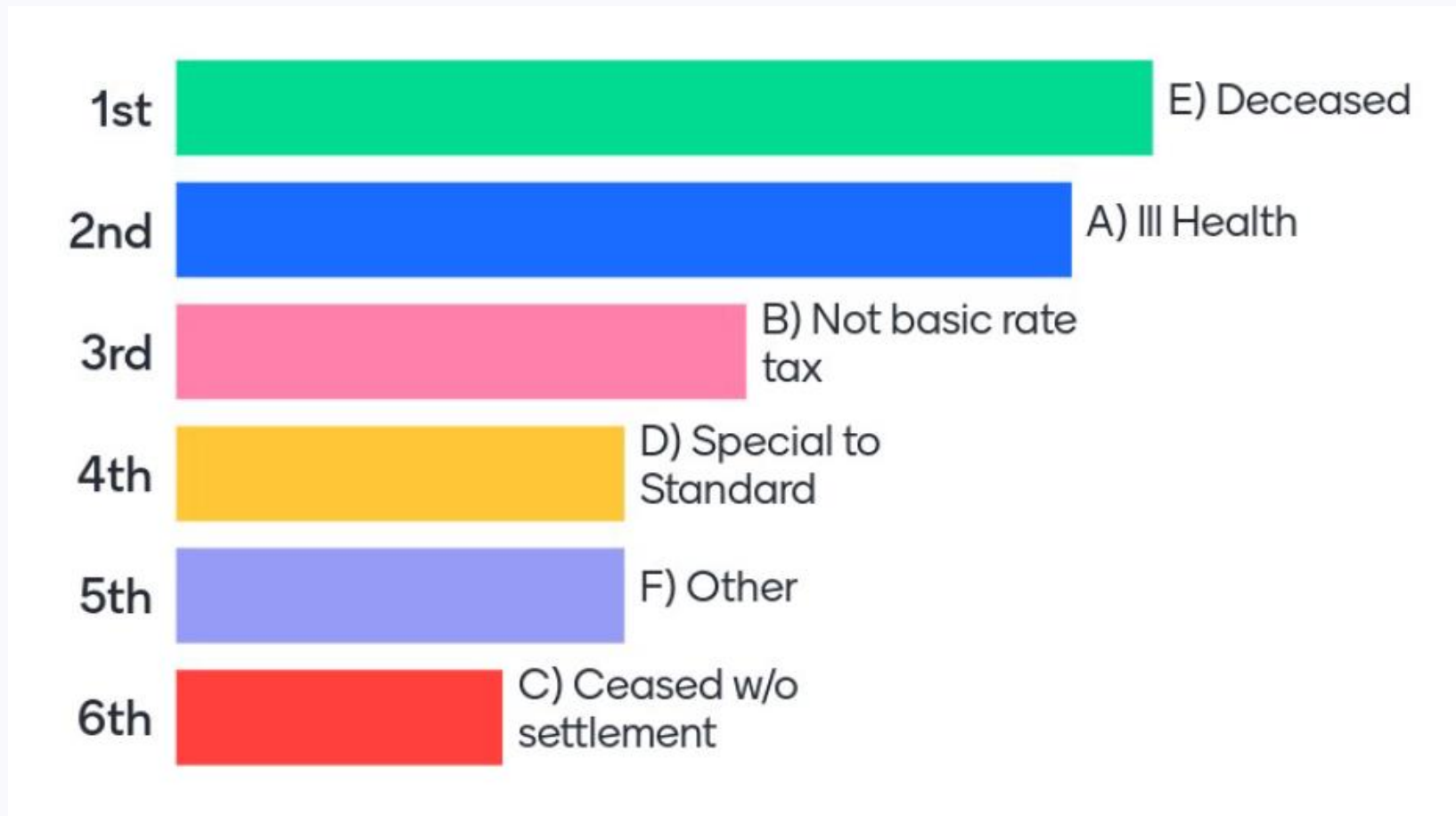


# Types of manual cases in practice to date

- A) Higher-tier & retrospective ill health retirements
- B) Not basic rate earners in extended limit period
- C) Ceased periodic payments early w/o settlement
- D) Special to standard conversions
- E) Deceased firefighter
- F) Other



# Types of manual cases in practice to date



# Manual cases process

## Extended User guide

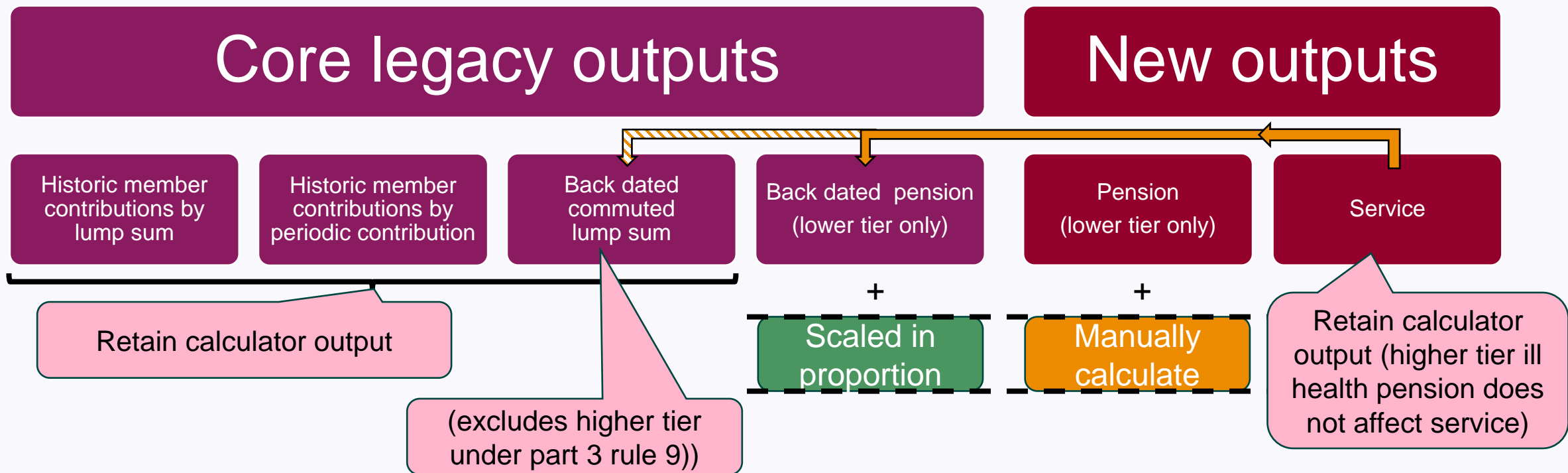
- Prepare case data normally
- Run calculator
- Manually calculate benefits using regs
- Adapt output using guidance

## Sending cases to GAD

- FRA: Share case data + benefit calc securely
- GAD: Check data consistency
- GAD: Share contributions and lump sums due

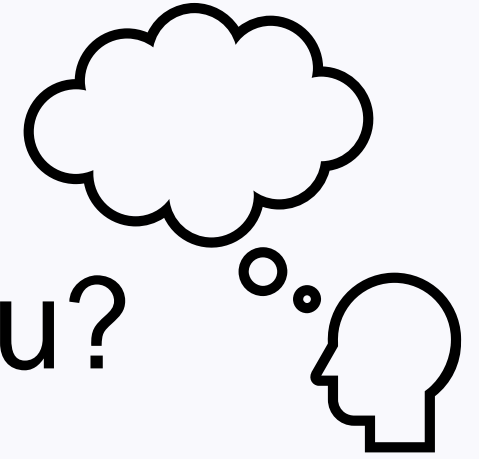
# Calculator & guidance example

Example: Retrospective ill health

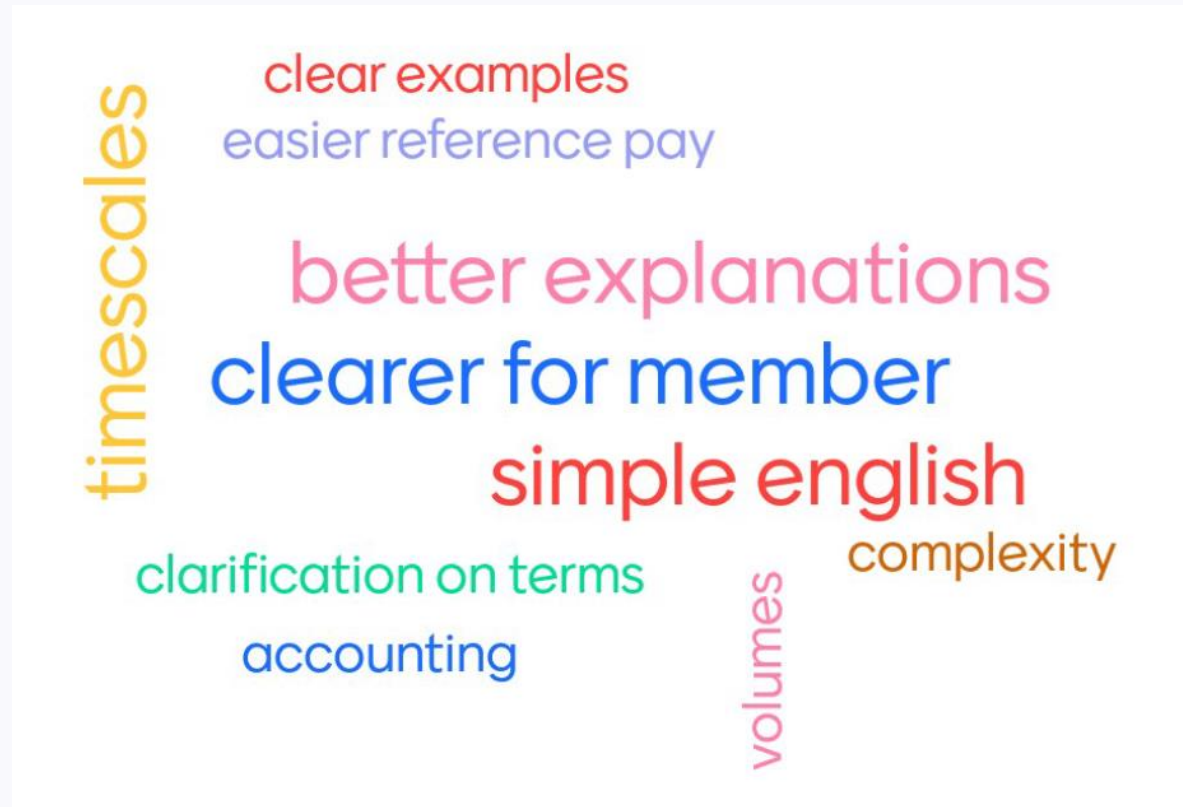


# Extended User guide format

## What features matter most to you?

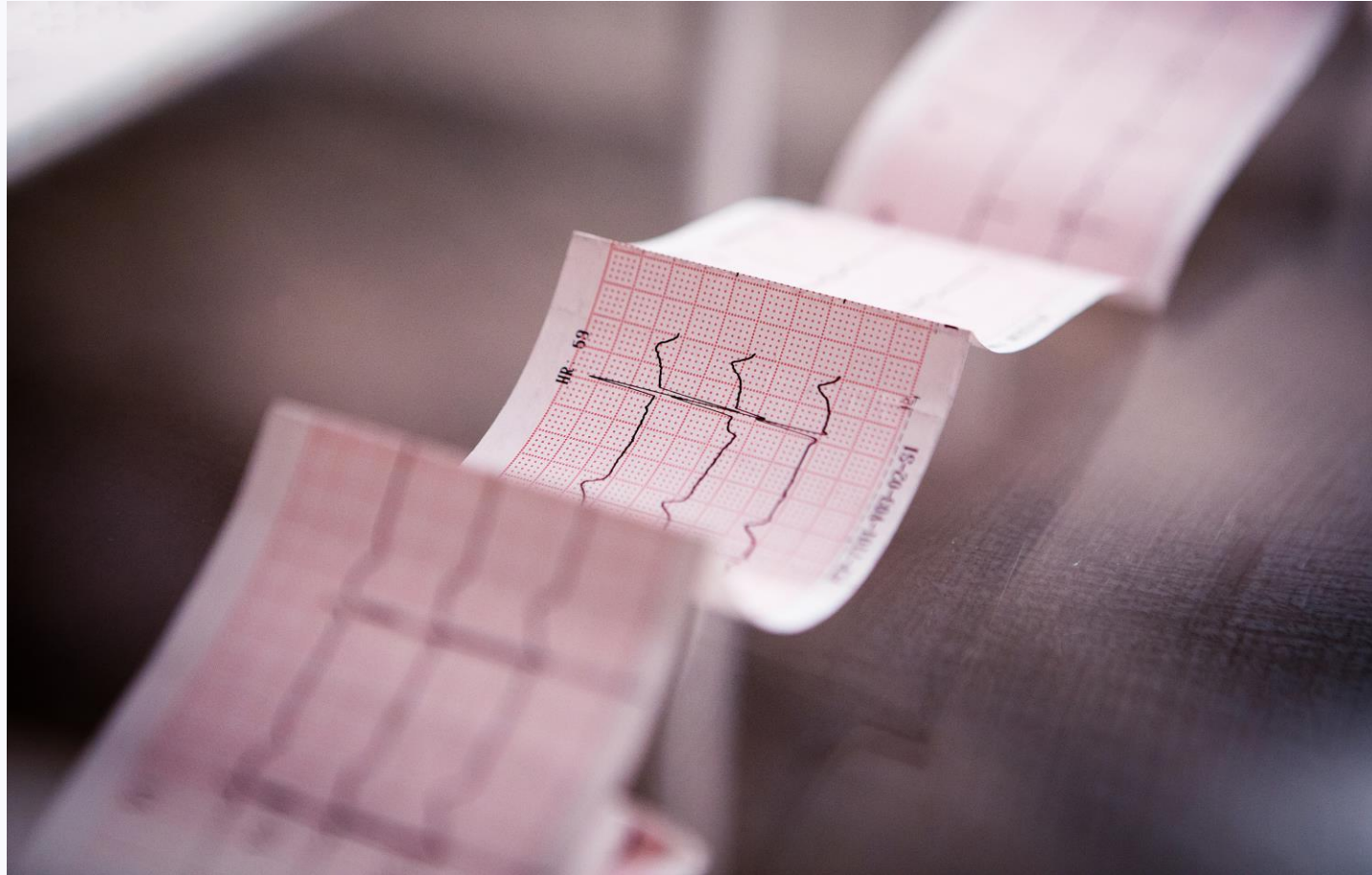


14 responses

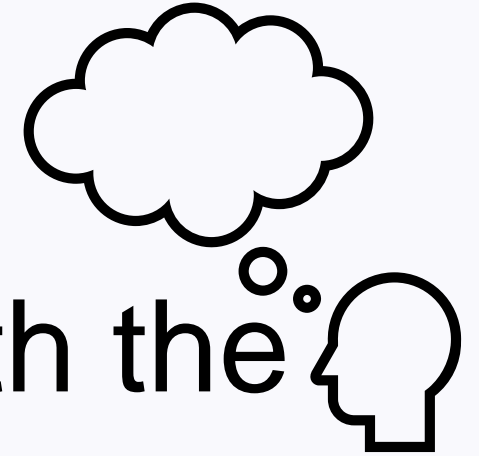




# Calculator Outputs – demo



# Calculator Outputs – poll



## What challenges do you face with the outputs?

During First exercise members wanted more explanation on how interest was calculated. Is there any notes or slides that explain the interest calculation in simple terms for the members.

Message in red appearing for pensioner saying needs referring to GAD even though I selected 'no' to undoing a conversion

Current resources, complexity and timelines, based on the 18,500 shown at the start we potentially have 9% of those :(

Mainly resources and struggles with understanding the complexity of the second option exercise in it's entirety

It would be good if the statement of service we are sending to members could match up with the outputs



# Questions and Answers





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