

Matthews Cohorts and Scenarios

Cohort 1 – 7 April 2000 to 30 June 2000 only

<i>1. Special Deferred i.e. left RDS service before 55</i>	<p>If under age 60 there is no immediate entitlement to pension rights</p> <p>If over age 60 there is an entitlement to immediate pension rights (backdated to the later of age 60 or date of RDS service)</p>
<i>2. Special Pensioner i.e. left RDS service after 55</i>	<p>Immediate pension rights which should be backdated to age 55 (or date of leaving if later)</p>
<i>3. Deceased</i>	<p>Death grant for extended limited period</p> <ul style="list-style-type: none"> • Must have died in service before 30 June 2000

Cohort 2 – 7 April 2000 to 30 June 2000 plus 1 July 2000 to 5 April 2006

<i>Special Firefighter i.e. still in RDS service (same role)</i>	<p>1. Joined FPS 2006 on or after 6 April 2006 and has remained in the pension scheme to date but did not elect service under Matthews 1</p> <p>Can buy modified service from start date to date joined FPS 2006</p> <p>Can convert FPS 2006 from standard to special up to 31 March 2015</p> <p>Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision.</p>
---	--

2. Did not join FPS 2006 and did not elect for modified service under Matthews 1 – Is this a SD example?

Can buy modified service from start date of RDS service to 31 March 2015, then has an automatic right for a CD under Sargeant but **must** agree to purchase CD and service post 1 April 2022 to be counted as a Special Firefighter

3. Joined FPS 2006 on or after 6 April 2006, has remained in the pension scheme to date and did elect for Special Service under Matthews 1

Can buy additional modified service up to the point they joined under Matthews 1

Can look to revisit original conversion option

Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision.

Special Deferred i.e. left service before age 55

- If under age 60 there is no immediate pension rights available
- If over age 60 has entitlement to immediate pension rights (backdated to later of age 60 or date of leaving RDS service)

4. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until date of leaving (DOL) (before 31 March 2015) but did not elect for modified service under Matthews 1

Can buy modified service from start date to date joined FPS 2006

No conversion options (currently under consideration with Home Office and any changes will be communicated asap)

As left before 31 March 2015 there is no link to Sargeant

5. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (after 31 March 2015) but did not elect for modified service under Matthews 1

Can buy modified service from start date to date joined FPS 2006

No conversion options (currently under consideration with HO and any changes will be communicated asap)

6. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until date of leaving (DOL) (before 31 March 2015) and did elect for modified service under Matthews 1

Can buy modified service from start date up to the point they joined under Matthews 1

No conversion options (currently under consideration with HO and any changes will be communicated asap)

As left before 31 March 2015 there is no link to Sargeant.

7. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (after 31 March 2015) and did elect for modified service under Matthews 1

Can buy modified service from start date up to the date they joined under Matthews 1

No conversion options (currently under consideration with Home Office and any changes will be communicated asap)

8. Did not join FPS 2006 and did not elect for modified service under Matthews 1 – Repeat example from Special FF

Can buy modified service from start date to 31 March 2015, then has an automatic right for a CD under Sargeant but **must** agree to purchase CD and service post 1 April 2022 to be counted as a Special Firefighter, if not they are a Special Deferred.

9. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until opting out (before 31 March 2015) and are still employed, did not elect for modified service under Matthews 1

Can buy modified service from start date to date joined FPS 2006

No conversion options (currently under consideration with Home Office and any changes will be communicated asap)

As opted out before 31 March 2015 there is no link to Sargeant unless CD claim is submitted and accepted by the scheme manager.

As policy/regs stand at the moment, in this scenario would they only be able to be rolled back to the 2006

standard scheme even if they submitted a CD, and would not be able to purchase the service between when they opted out and 31/03/2015.

They would however retain the final salary link and be deemed an active FF member as long as there had been less than a 5 year break and they have purchased all opted out service from 1 April 2015 to present day.

10. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until opting out (before 31 March 2015) and are still employed, did elect for modified service under Matthews 1

Can buy modified service from start date to the date they joined under Matthews 1

No conversion options (currently under consideration with Home Office and any changes will be communicated asap)

As opted out before 31 March 2015 there is no link to Sargeant unless CD claim is submitted and accepted by the SM.

As policy/regs stand at the moment, in this scenario would they only be able to be rolled back to the 2006 standard scheme even if they submitted a CD, and wouldn't be able to purchase the service between when they opted out and 31/03/2015.

They would however retain the final salary link and be deemed an active FF member as long as there had been less than a 5 year break and they have purchased all opted out service from 1 April 2015 to present day.

11. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until opting out (after 31 March 2015) and are still employed, did not elect for modified service under Matthews 1

Can buy modified service from start date to date joined FPS 2006

No conversion options (currently under consideration with Home Office and any changes will be communicated asap)

As opted out after 31 March 2015 there is a link to Sargeant, but the member would still have to submit a CD claim from the point they opted out to have the full remedy period counted. If this happens and member buys period of opted out service up to 31 March 2022, the service post 1 April 2022 onwards needs to be considered separately by the scheme manager and they can use their powers under FPS 2015 to allow the member to buy back opted out service in this scheme. Only if the member buys back their entire opted out period will be to be a firefighter member instead of a deferred member. They will also have the option to conversion options standard to special / special to standard. Rollback under Sargeant would depend on conversion option.

12. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until opting out (after 31 March 2015) and are still employed, did elect for modified service under Matthews 1

Can buy modified service from start date to the date they joined under Matthews 1

No conversion options (currently under consideration with Home Office and any changes will be communicated asap)

As opted out after 31 March 2015 there is no link to Sargeant unless a CD claim is submitted and accepted by the scheme manager. If this happens and member buys period of opted out service up to 31 March 2022, the service post 1 April 2022 onwards needs to be considered separately by the scheme manager and they can use their powers under FPS 2015 to allow the member to buy back opted out service in this scheme. Only if the member buys back their entire opted out period will be to be a firefighter member instead of a deferred member. They will also have the option to conversion options standard to special / special to standard. Rollback under Sargeant would depend on conversion option

Special Pensioners i.e. left service after age 55

- *Immediate pension right which should be backdated to age 55. (this will not apply to those individuals still in active service – pension become payable at date of leaving)*

13. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (before 31 March 2015) but did not elect for modified service under Matthews 1, FPS 2006 pension IS in payment.

Can buy modified service from start date to date joined FPS 2006

Can convert FPS 2006 from standard to special up to date of leaving however, this is only possible if the member is being paid an ordinary or ill health pension. This does not allow members who had their pensions paid early (before age 60) with employer consent

As left before 31 March 2015 there is no link to Sargeant.

14. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (before 31 March 2015) did elect for modified service under Matthews 1, FPS 2006 pension IS in payment.

Can buy modified service from start date up to the date they joined under Matthews 1.

Can convert FPS 2006 from standard to special up to date of leaving however, this is only possible if the member is being paid an ordinary or ill health pension. This does not allow members who had their pensions paid early with employer consent (before 55 for members who elected for Special benefits and before 60 for members who elected for Standard benefits)

As left before 31 March 2015 there is no link to Sargeant.

15. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (before 31 March 2015) but did not elect for modified service under Matthews 1, FPS 2006 pension IS NOT in payment

Can buy modified service from start date to date joined FPS 2006

No conversion options (currently under consideration with Home Office and any changes will be communicated asap)

As left before 31 March 2015 there is no link to Sargeant

16. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (before 31 March 2015) did elect for modified service under Matthews 1, FPS 2006 pension IS NOT in payment

Can buy modified service from start date up to the date they joined under Matthews 1.

No conversion options (currently under consideration with Home Office and any changes will be communicated asap)

As left before 31 March 2015 there is no link to Sargeant

17. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (after 31 March 2015) but did not elect for modified service under Matthews 1, FPS 2006 pension IS in payment.

Can buy modified service from start date to date joined FPS 2006

Can convert FPS 2006 from standard to special up to 31 March 2015 however, this is only possible if the member is being paid an ordinary or ill health pension. This does not allow members who had their pensions paid early with employer consent (before 55 for members who elected for Special benefits and before 60 for members who elected for Standard benefits)

Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision

If they do not convert, they will only be purchasing modified service up to the day before they joined the FPS 2006 and this will be a deferred benefit payable from age 60.

18. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (after 31 March 2015) did elect for modified service under Matthews 1, FPS 2006 pension IS in payment

Can buy modified service from start date up to the date they joined under Matthews 1.

Can convert FPS 2006 from standard to special up to 31 March 2015 however, this is only possible if the member is being paid an ordinary or ill health pension. This does not allow members who had their pensions paid early with employer consent (before 55 for members who elected for Special benefits and before 60 for members who elected for Standard benefits).

Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision

19. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (after 31 March 2015) but did not elect for modified service under Matthews 1, FPS 2006 pension IS NOT in payment

Can buy modified service from start date to date joined FPS 2006

No conversion options (currently under consideration with Home Office and any changes will be communicated asap)

Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision

If conversion isn't possible (or don't convert), they will only be purchasing modified service up to the day before they joined the 2006 scheme and this will be a deferred benefit payable from age 60. Rollback under Sargeant remedy period will be to the standard 2006 scheme

20. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (after 31 March 2015) did elect for modified service under Matthews 1, FPS 2006 pension IS NOT in payment

Can buy modified service from start date to date they joined under Matthews 1.

No conversion options (currently under consideration with Home Office and any changes will be communicated asap)

Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision

21. Did not join FPS 2006 and did not elect for modified service under Matthews 1, has since left employment (before 31 March 2015)

Can buy modified service from start date to DOL

Question mark over conversion options (currently under consideration with Home Office and any changes will be communicated asap)

As left before 31 March 2015 there is no link to Sargeant

22. Did not join FPS 2006 but did elect for modified service under Matthews 1, has since left employment (before 31 March 2015)

Can buy modified service from start date to date they joined under Matthews 1.

Can purchase FPS 2006 to DOL

Question mark over conversion options (currently under consideration with Home Office and any changes will be communicated asap)

23. Did not join FPS 2006 and did not elect for modified service under Matthews 1, has since left employment (after 31 March 2015)

Can buy modified service from start date to 31 March 2015

Question mark over conversion options (currently under consideration with Home Office and any changes will be communicated asap)

Automatic right to CD under Sargeant
If doesn't elect for a CD, any modified service purchased up to 31 March 2015 would be a deferred benefit payable from age 60

24. Did not join FPS 2006 but did elect for modified service under Matthews 1, has since left employment (after 31 March 2015)

Can buy modified service from start date to date they joined under Matthews 1.

Can purchase FPS 2006 to DOL

Question mark over conversion options (currently under consideration with Home Office and any changes will be communicated asap)

Automatic right to CD under Sargeant
If doesn't elect for a CD, any modified service purchased up to 31 March 2015 would be a deferred benefit payable from age 60

Deceased	25. Death grant for extended limited period <ul style="list-style-type: none"> • Must have died in service before 6 April 2000
	26. Additional death grant <ul style="list-style-type: none"> • Must have elected to join the scheme under Matthews 1 • Must have died before 31 March 2025, without making an election

Cohort 3 – 1 July 2000 to 5 April 2006 and not given 2014 option

Special Firefighter still in RDS service same role	27. Joined FPS 2006 on or after 6 April 2006 and has remained in the pension scheme to date but was not offered the opportunity to elect for modified service under Matthews 1
	Can buy modified service from start date to date joined FPS 2006
	Can convert FPS 2006 from standard to special up to 31 March 2015
	Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision
	If doesn't convert modified service purchased will be deferred to age 60 and rollback under Sargeant will be to the standard 2006 scheme
	28. Did not join FPS 2006 and was not offered the opportunity to elect for modified service under Matthews 1
	Can buy modified service from start date to 31 March 2015, then has an automatic right for a CD under Sargeant but must agree to purchase remedy period service and scheme manager must agree to them purchasing post 1 April 2022 to be counted as a Special Firefighter
	If doesn't submit a CD, any modified service purchased will be deferred to age 60

Special Deferred i.e. left service before age 55

- Under age 60 so no immediate pension rights
- Over age 60 so has entitlement to immediate pension rights (backdated to age 60)

29. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (before 31 March 2015) but did not elect for modified service under Matthews 1

Can buy modified service from start date to date joined FPS 2006

No conversion options

As left before 31 March 2015 there is no link to Sargeant

30. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (after 31 March 2015) but did not elect for modified service under Matthews 1

Can buy modified service from start date to date joined FPS 2006

No conversion options (currently under consideration with Home Office and any changes will be communicated asap)

If conversion is not possible modified service purchased up to the point the member joined FPS 2006 would be deferred to age 60 and roll back position under Sargeant would be to standard 2006 scheme

31. Did not join FPS 2006 and did not elect for modified service under Matthews 1, has since left employment (before 31 March 2015)

Can buy modified service from start date to DOL

No conversion options (currently under consideration with Home Office and any changes will be communicated asap)

As left before 31 March 2015 there is no link to Sargeant

32. Did not join FPS 2006 and did not elect for modified service under Matthews 1, has since left employment (after 31 March 2015)

Can buy modified service from start date to 31 March 2015

No conversion options (currently under consideration with Home Office and any changes will be communicated asap)

Automatic right to CD under Sargeant for remedy period.

If elects for CD for the remedy period and repays all contributions due, rollback scheme will be Modified Scheme

33. Did not join FPS 2006 and did not elect for modified service under Matthews 1 – Repeat example from Special FF

Can buy modified service from start date to 31 March 2015, then has an automatic right for a CD under Sargeant but **must** agree to purchase remedy period service and scheme manager must agree for service post 1 April 2022 to be purchased for them to be counted as a Special Firefighter, if not they remain a Special Deferred.

34. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until opting out (before 31 March 2015) and are still employed, did not elect for modified service under Matthews 1

Can buy modified service from start date to date they joined the FPS 2006

No conversion options (currently under consideration with Home Office and any changes will be communicated asap)

As opted out before 31 March 2015 there is no link to Sargeant unless CD claim is submitted and accepted by the SM.

As policy/regs stand at the moment, in this scenario would they only be able to be rolled back to the FPS 2006 even if they submitted a CD, and wouldn't be able to purchase the service between when they opted out and 31/03/2015

They would however retain the final salary link and be deemed an active FF member as long as there had been less than a 5 year break and they have purchased all opted out service from 1 April 2015 to present day.

35. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until opting out (after 31 March 2015) and are still employed, did not elect for modified service under Matthews 1

Can buy modified service from start date to the date joined FPS 2006

No conversion options (currently under consideration with Home Office and any changes will be communicated asap)

As opted out before 31 March 2015 there is no link to Sargeant unless CD claim is submitted and accepted by the scheme manager

If member submits a CD and repays all contributions for remedy period and scheme manager allows them to purchase post 1 April 2022 service, they will be deemed to be a FF member and they will have the option to convert standard to special / special to standard.

Rollback under Sargeant will depend on conversion option.

Special Pensioners i.e. left service after age 55

- *Immediate pension right which should be backdated to age 55*

36. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (before 31 March 2015) but didn't elect for modified service under Matthews 1, FPS 2006 pension IS in payment

Can buy modified service from start date to date joined FPS 2006

Can convert FPS 2006 from standard to special up to DOL however, this is only possible if the member is being paid an ordinary or ill health pension. This does not allow members who had their pensions paid early with employer consent (before 55 for members who elected for Special benefits and before 60 for members who elected for Standard benefits).

As left before 31 March 2015 there is no link to Sargeant.

37. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (before 31 March 2015) but did not elect for modified service under Matthews 1, FPS 2006 pension IS NOT in payment.

Can buy modified service from start date to date joined FPS 2006

Question mark over conversion options (currently under consideration with Home Office and any changes will be communicated asap)

As left before 31 March 2015 there is no link to Sargeant

38. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (after 31 March 2015) but did not elect for modified service under Matthews 1, FPS 2006 pension IS in payment

Can buy modified service from start date to date joined FPS 2006

Can convert FPS 2006 from standard to special up to 31 March 2022 however this is only possible if the member is being paid an ordinary or ill health pension. This does not allow members who had their pensions paid early with employer consent (before 55 for members who elected for Special benefits and before 60 for members who elected for Standard benefits).

Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision.

39. Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (after 31 March 2015) but did not elect for modified service under Matthews 1, FPS 2006 pension IS NOT in payment

Can buy modified service from start date to date joined FPS 2006

Question mark over conversion options (currently under consideration with Home Office and any changes will be communicated asap)

Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision.

40. Did not join FPS 2006 and did not elect for modified service under Matthews 1, has since left employment (before 31 March 2015)

Can buy modified service from start date to DOL

Question mark over conversion options (currently under consideration with Home Office and any changes will be communicated asap)

As left before 31 March 2015 there is no link to Sargeant.

41. Did not join FPS 2006 and did not elect for modified service under Matthews 1, has since left employment (after 31 March 2015)

Can buy modified service from start date to 31 March 2015

Question mark over conversion options – (currently under consideration with Home Office and any changes will be communicated asap)

Automatic right to CD under Sargeant.

Deceased

42.No provisions under the current regs.