Dashboard - Challenges / decisions to be made and recorded

Area	Challenge	LGA Recommendation
Calculations	Where value data cant be drawn from an ABS ran in the last 13 months, or any no other calcs on file; Should we: -Calculate value data each time a dashboard user requests view data OR -draw the data from a monthly bulk stored ABS calculation	Recommend draw data from a monthly ABS run
Revaluation of Deferreds	How to revalue deferred benefits	Recommend including PI calculated up to the illustration date
Rounding	Whether value data provided should be exact or rounded?	Recommend following existing approach in how you quote values in ABS
Members over NPA	How to calculate value data for members over NPA	For deferred members of the 1995 scheme - recommend returning 'details not available' along with administrative data. This is because benefits should already be in payment and not displayed on dashboard. For members of later schemes, recommend using scheme last year-end date as illustration date with late retirement increases included
Benefits with tranches linked to different NPAs	How to calculate value data where a member has tranches of membership with a benefits payable unreduced from different dates	Recommend you quote a single value as at: the illustration for accrued benefits and a normal pension age for estimated retirement income
Survivor Benefits	How to indicate whether survivor benefits are present where the member has different tranches of membership within a single benefit	Recommend returning an indicator to show the value data includes contingent survivor benefits
GMP Equalisation	Whether to account for GMP equalisation in value data	GMP Equalisation for PSPS is under review by HMT and sponsoring government departments. Until the outcome is known GMP equalisation cannot be accounted for within value data

GMP Stalemate	Whether to include individuals who HMRC shows as entitled to a GMP, but you believe the GMP did not accrue in your Fund or has been extinguished.	HMRC agreed in 2019 that any queries of this natures should be raised with HMRC and not to record such individuals on your system because you believe they were not a members of your Fund. Therefore we recommend you exclude these individuals as you should not hold record of them.
GMP values	How to calculate value data for members with a GMP	Recommend you do not include the GMP when calculating value data unless the member has passed the age at which GMPs are payable (60 women, 65 man) If this is the case, where appropriate you should uplift the value data to reflect the amount of GMP
AVC	Whether AVC view data should be provided to dashboards bu you or the AVC provider	Initially recommended AVC provider to provide data directly, however some AVC providers cannot do this. Needs to speak to AVC providers
Pension Debits	How to display value data where members benefits are subject to a pension debit	Recommend following existing approach in how you quote values in ABS
Scheme Pays Debits	How to display value data where members benefits are subject to a scheme pays debit	Recommend following existing approach in how you quote values in ABS
More than one UPM record	How to display view data where the member holds more than one benefit in the LGPS	Recommend view data for each benefit should be supplied to dashboard separately
Transfers in and Additional benefits	How to display additional benefits gained from a transfer in, purchased by a member or awarded by an employer	Recommend inlcuding additional benefits within value data without separating them out
Data refresh trigger	Value data can be no more than 12/13 months out of dat depending from where the data is retreieved. However circumstacnes change far more frequently and you will need to decide what changes in circumstances warrant the dashboard data being refreshed	Recommend that you refresh data at the minimum of monhtly so that value data can be drawn from data always within 1 monht old If you refresh data regualrly will need to consider what illustration date is used to calcualte accrued values

Flexible Retirements	For members who have felxibly retired and taken partial payment, or has flexibly retireed but it active in the scheme again. Whether you should show the unpaid view data.	DWP have confirmed that the unpaid data view/continued accrual view data is not in scope of regualtions. This means data will not be shown on dahsboard
Suspended Tier 3 IHR	Whether to display the view data where Tier 3 benefits have been suspended	FDWP have confirmed that whilst the pension is in payment they are out of scope and should not be displayed. However once the pension becomes suspended and the member is deferred again they are back in scope.
Preserved Refunds	Should members with frozen refunds be treated as relevant members for dashboard purposes	DWP have inidicated such members should not be treated as relevant members for dashboard purposes
Undecided Leavers	Undecided leavers - where you are informed of a leaver but have not yet calculated benefits. It can be manually set by you or automatically set by some software systems when a leaver is processed, however not all systems offer a temp status of undecided	Not all undecided leavers are in the scope of dashboards - such as refunds, transfers out, retirements etc. However some will be deferred benefits and in scope. MaPS have advised you will need to send undecided leavers to dashboard indicating that the data is unavailble as a transaction is outstanding. The ISP should be able to help with these cases