

Appendix B – McCloud Key Deliverables October 2023 – March 2024

Action	Progress	Deadline	Status
<p>Completion of GAD Calculator – Contribution Adjustments</p>	<p>The GAD calculator will need to be completed for all members in scope to work out the contribution adjustment or compensation amount due.</p> <p>Due to the volume of work required, this will be done in phases.</p> <p>Priority 1 – Transfer out cases - Complete Deferred choice cases as they arise – ad hoc as members retire Immediate choice cases for ill health/death cases - Complete</p> <p>Phase 2 – Immediate choice cases for taper/unprotected members – Between Oct 2023 and November 2024</p> <p>Phase 3 – Active/Deferred members - by 30 April 2024 to allow ABS-RSS to be produced by August 2024</p> <p>Phase 4 – Fully Protected members already retired – Between Oct 2024 and March 2025</p>	31/03/2025	<p>In Progress. Calculator for active & deferred members is on track to be completed by 30 April 2024</p>
<p>Production of IC – RSSs for ill health members</p>	<p>Recalculation of pension options and provision of IC – RSSs to ill health pensioners.</p>	31/03/2024	Complete
<p>Compensation for Added Years paid to affected members</p>	<p>All affected members have received communications about this change to their pension record and have received payment of compensation</p>	31/03/2024	Complete
<p>Register for HMRC tax portal</p>	<p>Registration for the tax portal has now been completed</p>	31/03/2024	Complete

Appendix B – McCloud Key Deliverables April 2024 – June 2024

Action	Progress	Deadline	Status
Production of IC – RSSs for beneficiaries of deceased members	Recalculation of pension options and provision of IC – RSSs to beneficiaries of deceased members.	31/05/2024	In Progress
Contingent Decisions	<p>Communicate the contingent decision process to all members.</p> <p>Draft an internal business process to handle claims as they are received.</p> <p>GAD calculator for opt out cases likely to be available from the beginning of May.</p>	31/05/2024	Not Started