



HM Treasury

## The Public Service Pensions (Information about Benefits) Directions 2014

The Treasury, in exercise of the powers conferred by section 14(2), (3) and (6) of the Public Service Pensions Act 2013(a), make the following Directions.

### **Citation, commencement and interpretation**

**1.**—(1) These Directions may be cited as the Public Service Pensions (Information about Benefits) Directions 2014, and come into force on 1st April 2015.

(2) In these Directions:

“benefit information statement”, in relation to a scheme under section 1 of the Act or a new public body pension scheme, means a statement issued in accordance with the provisions of section 14 of the Act;

“the Act” means the Public Service Pensions Act 2013; and

any term in these Directions that is defined in the Act has the same meaning as in the Act.

### **Information to be included in benefit information statements**

**2.** A benefit information statement provided by the scheme manager for a scheme under section 1 of the Act or a new public body pension scheme to a person in pensionable service under such a scheme must include the information listed in Parts 1 and 2 of Schedule 5 (statement of benefits: non money purchase benefits) to the Occupational and Personal Pension Schemes (Disclosure of Information) Regulations 2013(b) in relation to pensionable service—

- (a) under the scheme, and
- (b) under any statutory pension scheme that is connected to it.

### **Manner of provision of benefit information statements**

**3.** The manner in which a benefit information statement is provided may include any of the following—

- (a) by hand;
- (b) by sending it to the person’s last known postal address;
- (c) subject to the requirements in directions 4 to 6, by sending it to the person’s last known electronic address;
- (d) subject to the requirements in directions 4, 5 and 7, by making it available on a website.

**4.** Where a benefit information statement is provided by being sent to a person’s electronic address or made available on a website, the scheme manager must on request from the person concerned provide a copy of the statement to the person free of charge in a paper copy or a similar form capable of being read.

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(a) 2013 c.25.

(b) S.I. 2013 /2734.

**5.** A benefit information statement may only be provided by being sent to a person's electronic address or being made available on a website if the scheme manager is satisfied that the statement is provided in a manner—

- (a) designed so that the person will be able to get access to, and store or print, the statement; and
- (b) that takes into account the requirements of disabled persons.

**6.** Where a person's electronic address is used for the first time to provide a benefit information statement to a person, the following information must first have been given to the person by hand or sent to the person's last known postal address—

- (a) the manner in which the statement is to be provided; and
- (b) an explanation of how to get access to and read the statement,

and each subsequent time an electronic address is used to provide a benefit information statement to the person, the information mentioned in paragraphs (a) and (b) must first have been given in such a manner as the scheme manager considers will bring that information to the person's attention.

**7.** Where a website is used for the first time to provide a benefit information statement to a person, the following information must first have been given to the person by hand or sent to the person's last known postal or electronic address—

- (a) the manner in which the statement is to be provided; and
- (b) an explanation of how to get access to and read the statement,

and each subsequent time a website is used to provide a benefit information statement to the person, the information mentioned in paragraphs (a) and (b) must first have been given in such a manner, including by sending it to the person's last known electronic address, as the scheme manager considers will bring that information to the person's attention.

**8.** A benefit information statement may be provided by the scheme manager in accordance with these Directions either directly or indirectly, through a third party.

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