

STATES OF JERSEY



Jersey

DRAFT SOCIAL SECURITY (HEALTH AND CHRISTMAS BONUS) (JERSEY) AMENDMENT REGULATIONS 202-

**Lodged au Greffe on 9th January 2026
by the Minister for Social Security
Earliest date for debate: 24th February 2026**

STATES GREFFE

REPORT

Executive summary

Following the States Assembly's approval of the [Budget 2026-2029](#), the Minister for Social Security is lodging these proposals as part of Government's commitment to expand the healthcare support that is available to the Island's pensioners.

These proposals are being lodged in order update the rules for the Pension Plus Scheme (PPS) as quickly as possible following the approval of the Supporting Islanders and Strengthening Communities project included in the Budget – the whole project has an agreed budget of £1.6-£1.8 million with an estimated £625,000 being allocated to cover the change to the PPS.

Up to 1,300 pensioners will see expansion of this support in two ways – subject to the approval of the Assembly:

- 1) The Pension Plus Scheme or PPS¹ is being changed so that pensioners who pay up to £1,000 in Income Tax can qualify for it – currently, pensioners can only qualify if they pay no tax at all.
- 2) Those pensioners who – because of this change – qualify for the PPS will also join the Health Access Scheme (HAS) – this scheme allows for discounted visits to General Practitioners (GPs).

There are multiple aspects to these proposals. The change to the allowable taxable income can be made by Ministerial Order, whilst a small change needs to be made using Regulations because there will be two different ways to qualify for the PPS. Qualification for the Health Access Scheme does not have a legislative link at all but is included in this proposition so that members get a holistic view of the changes that are being put forward.

If approved, these changes will support the Community and Economic wellbeing pillars of this Government's [Common Strategic Policy](#), more specifically – Health and Wellbeing and Affordable Living – by enabling lower income pensioners with a small tax liability to now access a scheme which supports health costs and also grants access to reduced GP fees.

Means tested support for pensioners

The PPS is means tested and is currently available to lower income pensioners with no income tax liability and less than £64,000 in savings (excluding value of home).

The scheme provides financial support for dental, chiropody and optical check-ups and treatments.

In addition, anyone eligible for PPS can also access the HAS and receive discounted visits to GPs however, this link is not legislative.

The *current* eligibility criteria for the PPS are also used to provide access to a Christmas Bonus payment.

Separately, cold weather bonuses are also provided through the Bonus Law.

The following links are to the general information available on each of the current benefits that are included in this report:

- [Pension Plus Scheme](#)

¹ A means tested scheme which helps pensioners with dental, optical, and chiropody costs

- [Christmas Bonus](#)
- [Health Access Scheme](#)
- [Cold Weather Bonus](#)

Legislation – Background and context

The [Social Security \(Bonus\) \(Jersey\) Law 2014](#) has been used by the States Assembly to set up several different schemes to make payments to Islanders – two of these are the Christmas and the Health Bonus Schemes (the latter being commonly known as the Pension Plus Scheme).

The legislation created under the Bonus law and which sets out the rules for the PPS are the [Social Security \(Health Bonus Scheme\) \(Jersey\) Regulations 2016](#) and the [Social Security \(Health Bonus Scheme\) \(Jersey\) Order 2016](#) and for the Christmas Bonus payments the [Social Security \(Christmas Bonus\) \(Jersey\) Regulations 2016](#) and the [Social Security \(Christmas Bonus\) \(Jersey\) Order 2023](#).

Proposed changes to legislation

As part of the agreed Budget 2026-2029, the Minister for Social Security now plans to extend the eligibility for the PPS scheme to include pensioners with an income tax liability of up to £1,000 for the year prior to application to the scheme. It is estimated this could bring up to 1,300 additional pensioners into this scheme.

This expansion will also allow these additional pensioners to benefit from the Health Access Scheme.

In addition, Islanders currently on the PPS i.e. who are eligible for it under the current rules – also qualify for the Christmas Bonus – and neither that nor the means testing rules for that Bonus will be changing. However, it is necessary for the Minister to make clarifying changes to the Christmas Bonus Regulations as there will be more than one way to qualify for the PPS.

The proposed Regulations maintain the current eligibility for the Christmas Bonus and will mean that there are separate eligibility rules to both the Christmas Bonus and PPS in the Orders linked to the respective pieces of legislation.

The updated eligibility criteria i.e. allowing for a small tax liability, will be introduced by changes to the Health Bonus Scheme (PPS) Order.

Commencement and implementation

If approved, the changes to Regulations will be made by Ministerial Order, with relevant amendments to Orders being made at the same time. The Minister has targeted the end of March as the proposed date for launching these updates to the PPS; this gives time for the updated rules to be well communicated and also to ensure systems and operational processes are updated accordingly.

Financial and staffing implications

The proposals and their funding form part of the recently approved Budget 2026-2029, as part of the Supporting Islanders and Strengthening Communities project, which has funds of £1.6-£1.8 million allocated in each year of the plan.

This change to the PPS has been estimated to cost up to an additional £625,000 a year in tax funded spending. This has been factored into the department tax funded benefit budget following the Assembly's approval of the Budget. The addition of more people to the Health Access Scheme

falls within the agreed limits of that scheme as they currently stand with the costs being met from the Health Insurance Fund.

There are no additional staffing resources required for this change. The administration will be handled from existing department resources.

Children's Rights Impact Assessment

The Minister for Social Security considers that this proposition has no direct or indirect impact on children and that the duty to have due regard to the UN Convention on the Rights of the Child does not arise. Accordingly, a Children's Rights Impact Assessment is not required under the [Children \(Conventions Rights\) \(Jersey\) Law 2022](#).

EXPLANATORY NOTE

The draft Social Security (Health and Christmas Bonus) (Jersey) Amendment Regulations 202- amend the Social Security (Christmas Bonus) (Jersey) Regulations 2016 (the “2016 Regulations”), the Social Security (Christmas Bonus) (Jersey) Order 2023 (the “2023 Order”) and the Social Security (Health Bonus Scheme) (Jersey) Order 2016 (the “2016 Order”) in order to increase the income threshold under which a person is eligible for a bonus under the 2016 Order, while maintaining the current eligibility threshold under the 2016 Regulations and 2023 Order.

The Regulations come into force on a day to be specified by the Minister for Social Security by Order.



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Made [date to be inserted]

Coming into force [date to be inserted]

THE STATES make these Regulations under Articles 2 and 3 of the [Social Security \(Bonus\) \(Jersey\) Law 2014](#) –

1 [Social Security \(Christmas Bonus\) \(Jersey\) Regulations 2016](#) amended

For Regulation 2(2A) (entitlement to Christmas bonus) of the [Social Security \(Christmas Bonus\) \(Jersey\) Regulations 2016](#) there is substituted –

- (2A) Subject to paragraph (4), a person is taken to have submitted a claim to the Minister under Regulation 5 and to have received a notification under that Regulation that the claim has been accepted if the person –
- (a) is admitted, under Regulation 5 of the [Social Security \(Health Bonus Scheme\) \(Jersey\) Regulations 2016](#), to the health bonus scheme on or before 1 November in the year in respect of which the Christmas bonus is payable;
 - (b) remains eligible to be admitted to the health bonus scheme during the whole of that November; and
 - (c) fulfils the eligibility requirements in paragraph (2).

2 [Social Security \(Christmas Bonus\) \(Jersey\) Order 2023](#) amended

After Article 1 (amount of Christmas bonus specified) of the [Social Security \(Christmas Bonus\) \(Jersey\) Order 2023](#) there is inserted –

1A Eligibility for Christmas bonus: maximum income and assets

- (1) For the purpose of Regulation 2(2)(d) of the [Social Security \(Christmas Bonus\) \(Jersey\) Regulations 2016](#) –
- (a) the maximum income is the total annual income of the person and the person's partner (if any) above which the person or their partner (if any) is liable to be charged income tax; and
 - (b) the maximum total assets are assets of the person and the person's partner (if any) with a total aggregated maximum value of £64,000 on the date that the person applies for the Christmas bonus.

- (2) For the purposes of paragraph (1)(a), a person or their partner is not liable to be charged income tax if –
 - (a) neither the person nor their partner has been notified under Article 25 of the [Income Tax \(Jersey\) Law 1961](#) that they are liable to be charged income tax in respect of the year of assessment of the person or their partner immediately preceding the year in which the person applies for the Christmas bonus; or
 - (b) in the case where no assessment has been made in respect of that year of assessment, neither the person nor their partner has been notified under Article 25 of the [Income Tax \(Jersey\) Law 1961](#) that they are liable to be charged income tax in respect of the year of assessment of the person or their partner immediately preceding the year of assessment referred to in paragraph (a).
- (3) A person is the partner of another person for the purposes of this Article if the person normally occupies, as their principal residence, the same dwelling as the other person and they are married, in a civil partnership or in a marriage-like or civil partnership-like relationship with each other.
- (4) But a person is not a partner of another person if they are living separately in the same dwelling under a formal agreement.
- (5) For the purpose of paragraph (3), if a person occupied, as their principal residence, the same dwelling as their partner before receiving long term care in an approved care home, they are treated as occupying, as their principal residence, the same dwelling as their partner.
- (6) When calculating the value of the assets under paragraph (1)(b), the person’s principal residence must not be treated as an asset.
- (7) In order for the Minister to ascertain the relevant total income or relevant total assets of a person, the Minister may have regard to any information provided by the Comptroller of Revenue or the other information that the Minister may require the person to provide.

3 [Social Security \(Health Bonus Scheme\) \(Jersey\) Order 2016](#) amended

In Article 2(1)(a) (eligibility for health bonus: income and capital thresholds) of the [Social Security \(Health Bonus Scheme\) \(Jersey\) Order 2016](#), for “charged to” there is substituted “charged more than £1,000 in”.

4 Citation and commencement

These Regulations may be cited as the Social Security (Health and Christmas Bonus) (Jersey) Amendment Regulations 202- and come into force on a day to be specified by the Minister by Order.