Teachers' Pension Scheme 2021/04

Who should read:	• Directors of Education and Finance • All HR and Payroll Managers • Teachers Unions and representatives
Action:	To read and circulate to all appropriate parties
Subject:	Revised Retirement Application Form (TEACH:RET)
Date:	17 February 2021

The purpose of this circular is to inform you of the changes we have made to the Retirement Application Form and to advise you that this form should be used for any new applications completed from 17 February 2021.

What we have done

Following your feedback and our review of last summer's retirement exercise, we have updated our retirement application form (TEACH:RET), which you can access on our website Forms page.

Key updates on the changes:

- We have put a word version of the application on our website, to make the application easier to fill in.
- To ensure members are aware their salary could be capped in the last three years prior to retirement if their salary increased by more than 10% plus the normal increases over those years.
- Made the employers section more concise and relevant.
- Reviewed the questions, to make it easier to complete the application form.

More detailed information on the changes and how to submit the forms to us is available below in the **Annex.**

What you need to do

The revised application form is already on the website. Please ensure this form is used from 17 February 2021.

Please ensure that anyone who is involved in the completion and submission of the TEACH:RET application form is made aware of this circular.

Any questions?

Please contact linda.peebles@gov.scot or trudi.colebrook@gov.scot if you have any enquiries regarding this circular.

Annex

The main changes to the form for the member

Part 1 - Section 1

If a member has benefits in multiple scheme's they must select which scheme(s) they wish to claim their benefits from. If the member is unsure if they have benefits in more than one scheme, then you should direct them to their Annual Benefit Statement.

The member must also confirm that if they are on supply, that they will have resigned from all supply contracts with all employers by their proposed retirement date and that they should send the TEACH:RET form to all of their employers.

There is a paragraph to make sure members are aware that their pensionable salary may be restricted if their salary has increased by more than 10% at any single point within the last 3 years. Further information on this is available on our website.

Part 2 - Section 1

We have added a question here asking you to confirm if the member is in the 2015 CARE scheme. If they are, then you will need to complete the additional questions in Section 2.
In addition we have also asked you to confirm that the member will have terminated all of their supply contracts. The guidance has also been updated in the box at the bottom of his page.

Part 2 - Section 2

The previous version of the form was split into Sections 2 A-D depending on if the member was full time, part time, supply or in CARE. We have combined all these sections into one now, so for all members the employer will complete the new Section 2.

'Section 2' will need completed for each contract, a box has been added at the top for the contract's payroll number and the date the contract began for us to link this with the correct contract on our records. (A separate copy of Section 2 is available on our website Forms page if it is required).

We still ask for information up to the annual return for the financial year preceding the date of retirement and information up to the date of leaving.

For all members please provide us with the Salary Rate. If the member is full time, then we need the number of days the member has worked. If the member is part time or on supply, then we ask you to instead provide us the number of hours worked and the full time equivalent hours.
If the member is in the 2015 Care Scheme, then in addition to the above, we also need you to provide us with the CARE Pensionable Pay (including any overtime) as well as the overtime earnings element on its own.

The same information above is requested for the leaving period, however additionally, we also ask you to provide us with the value of the SNCT Leaver Adjustment (if applicable) for all members.

A notes section has been added to the bottom of page 18 to provide you with an area for any additional information you deem relevant.

On page 19, we have now broken down the information we are looking for to make it clearer. We ask you to provide us with the member's salary rates over the last 365 days prior to their retirement. There is now a table to provide us with any periods of acting up within the last 10 years.

At the bottom there is also a final table to provide us with any periods of absence within the last 10 years and to confirm if this was on half pay or nil pay.

If you have more information to provide than there is space for in the table, then this can be added to the notes section at the bottom of page 18.

Part 2 - Sections 3, 4 and 5

Please provide an email address for where you would like us to direct any enquiries regarding the information provided on the Retirement Application.

Much of this information you already supplied but by asking for this in this way and up front it should mean there will be less data queries coming back to employers. This should hopefully speed up the process for the payment of the member's pension.

Electronic submission of applications

All applications should be sent electronically. When submitting applications please check that the member has correctly completed Part 1 of the application prior to submission. If submitting a Phased application please ensure the Phased certificate is completed.

Applications need to be emailed to the SPPA on this email address stssretirementapp@gov.scot

We require each completed application to be submitted as an individual attachment rather than one attachment containing several applications. The email can take as many separate attachments as necessary. You will receive an acknowledgement email on receipt, with the member receiving an acknowledgement email once the application has been checked and provided they have supplied an email address.

If a member wishes to see their benefits prior to the award being processed they should tick 'further information required' under Part 1 Section 4 Lump Sum Choice. This gives them the opportunity to choose more or less cash when settling the benefits. Members cannot change their mind once the application has been processed.