

Teachers' Pension Scheme 2024/03

- 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:** Summer Retirements 2024 (Updated)
- Date:** 28 March 2024

The purpose of this circular is to confirm the process and information required for summer retirement applications for 2024

We would like to inform you that the previous circular 2024/03 (Issued 13 March 2024) has been updated, and we kindly request your immediate attention to the following information. It is essential that you adhere to the instruction provided below. We apologise for any confusion caused by the previous circular and appreciate your understanding and cooperation.

SPPA appreciate employer's ongoing collaboration in ensuring the seamless transition of our members into retirement. As part of our commitment to timely and accurate pension payments, we want to stress the importance of submitting retirement applications well in advance. Currently, approximately 34% of retirement applications are received late (within 3 months of retirement date), posing challenges in guaranteeing on-time payments to our members.

To address this and accommodate the additional calculations required for remedy provisions, the deadline for receipt of applications has been increased to **4 months** before the member's retirement date. The following is a schedule for 2024 of when fully completed applications must be received by SPPA to ensure payments are made on time:

Retirement Month	Applications Required By
Jun-24	Feb-24
Jul-24	Mar-24
Aug-24	Apr-24
Sep-24	May-24
Oct-24	Jun-24
Nov-24	Jul-24
Dec-24	Aug-24

We are working on a first come first served basis and do not have the ability to fast track late applications. Please ensure that members considering retirement are fully aware that late applications will result in delays in receiving their pension benefits. We understand the pressures that employers are under, and especially payroll teams, and acknowledge your assistance in helping us to maintain the high standard of service our members deserve.

Our priority will be on completing all the summer retirements, therefore any revision of pensions will not be looked at until after this exercise is complete. For revisions to be processed a revised **RET2** form must be submitted and a **STPS02 should be completed with “revision salary increase” in the comments.**

Please remember that all members joined the STPS 2015 scheme from 1 April 2022 therefore information on CARE earnings including details of SNCT adjustment and overtime are required on the return alongside details of salary rate and service.

Further guidance for retirements

- Member's retiring from the scheme must terminate all their employments which includes all supply work contracts for at least one full day if they are intending to become re-employed as a teacher.
- We require you to submit a STPS02 leaver form once a teacher has retired so that we can take the necessary exit action on the member's record.
- We must receive a revised Part 2 form ASAP if there is any change to the retirement date, hours or salary information that has previously been submitted.
- For phased retirements, please remember to complete and send a STPS01 (date contract on reduced hours starts) and a STPS02. The information submitted on the STP02 should be at the last day of the finishing contract and should match the information given on the retirement application form. If the information is different please inform the Teachers awards team.
- That completing an application form is not a method in which member's should obtain an estimate, only those wishing to retire should submit an application.
- You can access the employer data portal here [SPPA Employers EDM](#).

Electronic submission of applications

All applications should now be submitted by email. When submitting applications electronically, 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 and the percentage is shown. Please check there is a Part 2 for each contract worked in the previous year.

To submit these, we require each completed application to be submitted individually rather than one email containing several applications. If we receive an email containing applications for multiple members these will be returned for re-submission on an individual basis.

You will receive an acknowledgement email on receipt, with the member receiving an acknowledgement email once the application has been checked, provided they have supplied an email address.

Applications should be emailed to us at stssretirementapp@gov.scot

Retirement application form

It is vitally important to use the most recent TEACH:RET application form, which you can access on our website at: <https://pensions.gov.scot/teachers/teachers-forms>

Employers should not download and store applications as our forms are regularly updated.

Processing and paying the pension on time is dependent on accurate information being submitted on the most recent application form. As of 1 April 2024, older versions of the application may be rejected and a new one requested.

Completed applications must be emailed to: stssretirementapp@gov.scot

Any questions?

Please contact Douglas.McBeath@gov.scot or Lauren.McRoberts@gov.scot if you have any enquiries regarding this circular.

SPPA Teachers Retirements

28 March 2024