

Teachers' Pension Scheme 2024/03

Who should read:	<ul style="list-style-type: none">• 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
Date:	13 March 2024

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

To allow for the timely payment of our members' pension benefits, we must receive fully completed applications no later than **3 months** prior to the date of retiral. For example, for August retirals, if a members' retirement date is 13 August, this means we require the completed application form no later than 14 May. This will allow us the necessary time to check the members record, history details, query data with employers, calculate and authorise the pension for payment. All applications are prioritised by date of receipt and are processed within 3 months from that date.

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.

Late applications

We fully appreciate that circumstances do not always enable you to submit applications within the required timescales. In such cases we will try to minimise any payment delays where possible, however the current processing timescale is three months from date of receipt of the **fully completed** application from the employers - **both parts one and two**. Please ensure you make the member aware of this prior to submitting the application as they may wish to delay their retirement date so their application is on time. **Members should not delay in sending in a retirement application as we are working strictly to processing 3 months after receipt of completed applications.**

Remedy

For members affected by Remedy any service between 1 April 2015 to 31 March 2022 has now been automatically rolled back to the final salary (legacy) schemes. These members will receive a Remedy choice in the future to ensure they do not lose out. If any additional pension is due, then it will be paid and backdated to the members retirement date. Members should therefore not delay in sending in their applications.

You can find out more about Remedy here:

<https://pensions.gov.scot/teachers/teachers-remedy-hub>

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 constantly being 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

13 March 2024