



SCOTTISH PUBLIC PENSIONS AGENCY

Scottish Teachers' Superannuation Scheme

To:

The Secretary General, Convention of Scottish Local Authorities

The Director of Education, Director of Finance & Human Resources
Manager, Scottish Local Authorities

Principals of Further and Higher Education Institutions

Independent Schools

Official Correspondents of Other Participating Organisations

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Dear Sirs

SUPERANNUATION (TEACHERS) CIRCULAR NUMBER 2005/1

Winding Down Applications

I am writing to advise you of a slight change in our procedure for dealing with Winding Down applications, and also to clarify the criteria for qualifying for Winding Down employment. This has been done at the request of numerous employers, many of whom believed previous guidance provided by the SPPA was not explicit enough.

In terms of qualifying criteria, I would refer you to Reg H1A, below:

To participate in winding down employment a teacher must –

- (a) have attained the age of 56;
- (b) have been in full-time service for a period of 10 years immediately prior to commencing winding down employment;
- (c) subject to sub-paragraph (b) above have a minimum of 25 years teaching service immediately prior to commencing winding down employment, which period may include a break or breaks in teaching service not exceeding 5 years in total; and
- (d) have the consent of his employer.

It is against this qualifying criteria which all applications should be assessed. Previously, the Winding Down procedure has been for employers to assess an employee's eligibility and advise us of any commencement of Winding Down employment (through the submission of a TSS2 and TSS1).

However, numerous employers have raised concerns regarding this procedure, stating they are not comfortable assessing an employee's eligibility for Winding Down employment. Also, in some cases the employers find they do not have access to the necessary evidence of teaching employment to support an application.

As such, we have reviewed the Winding Down application procedure and made the following minor adjustment:

- The member completes the Winding Down application form. If the employer gives consent on the form, it is sent to SPPA to determine eligibility. When teaching service has been accrued outwith Scotland the applicant may need to provide evidence of teaching employment in support of their application.
- The SPPA recommend that applications should be made three months in advance of the proposed Winding Down date.
- The SPPA determine whether the applicant is eligible and advise the employer and employee accordingly.
- If the application is approved, we ask the employer for a TSS2 and TSS1 at that point - not before.

I have attached with this letter the revised [Application Form and Leaflet](#) for your attention. We would be grateful if you could use this new Application Form in all future applications.

If you have any queries regarding this matter please do not hesitate to contact me.

Yours faithfully

A handwritten signature in cursive script that reads "Christine Ramage".

Christine Ramage
Regional Manager