

**TEACHERS' PENSION SCHEMES
07/2016**

WHO SHOULD READ: Directors of Education and Finance
HR Managers and Payroll Managers
Teachers' Unions and representatives

ACTION: To read and circulate to all appropriate parties
Inform scheme members

SUBJECT: Submission of 2016 Summer retirement application forms

The purpose of this circular is to:

- highlight the timescales for submission of summer retiral applications
- clarify process for late applications
- confirm the information required
- highlight facility for accepting electronic submission of applications
- direct requests for benefit estimates to My Pension online service

Following on from the success of the 2015 Teachers' Summer Retiral exercise, we are again looking for your support and assistance to ensure that we process the majority of Teachers' retirement applications on time as part of the 2016 exercise.

Timescales for submission of applications for June to September retirals

To allow for the timely payment of our members' pension benefits, we must receive applications with a retiral date between June and September 2016, no later than three months or ideally four months prior to the date of retiral. This will allow us the necessary time to check the members record and history details, calculate and authorise the award application to put the pension into payment by the due date. However, this is dependent on accurate information being submitted on the application form.

Late applications

We fully appreciate that circumstances do not always enable you submit applications within the required timescales. In such cases you can be assured that we will try to minimise any payment delays where possible. We would, however, ask that you keep us informed of any potentially late submission of applications and also encourage you to advise the member that their payment may be delayed as a consequence.

May I also use this opportunity to remind you that member's retiring from the scheme must terminate their employment for at least one full day if they are intending to become re-employed as a teacher. We also require you to submit a TSS2 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 if there is any change to the retirement date, hours or salary information that has previously been submitted.

Premature Retirement or Early Release exercise

As you will appreciate, we need to plan to maximise our resources at this busy time. To



assist us with this it would be particularly useful for us to know if you intend to implement any premature or early release exercise. We understand that exercises like this involve a lot of work for the employers, but any insight into your intentions will allow us to provide a better service to our members. In order to assist you in calculating estimates of employer's costs for these cases there is premature calculator on the employers section of our website.

Electronic submission of applications

As you may be aware, last year we introduced a facility for accepting electronic applications in order to help us deal with the increase in applications over the summer and to improve the service to both our employers and members. This service has been successful with over 30% of summer retirement applications being received by e-mail in 2015.

I would encourage employers to take advantage of this service, as it saves you time and offers peace of mind knowing that we have received the application the day you send it. When submitting applications electronically, please check that the member has correctly completed Part 1 of the application prior to you submitting it to us.

Applications need to be scanned and emailed to the SPPA on this email address stssretirementapp@scotland.gsi.gov.uk. To submit these electronically, 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.

Estimate of benefits requests

I am sure you will understand that our resourcing over the next few months is targeted at prioritising our workloads to ensure that retirement applications are processed and paid on time. Therefore, can I ask you to direct member requests for estimates to our secure online service My Pension. This is available through www.sppa.gov.uk and members can access their latest annual statement information as a base for producing their own estimates. Your support and assistance is greatly appreciated.

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

Gerry McGarry
Senior Operations Manager
March 2016

Contact information

Please contact greg.walker@gov.scot if you have any enquiries about this circular.

Scottish Public Pensions Agency
7 Tweedside Park
Tweedbank
GALASHIELS
TD1 3TE

www.sppa.gov.uk
Telephone: 01896 893000
Fax: 01896 893214