

Scottish Teachers' Superannuation Scheme Circular 2009/1

The Secretary General, Convention of Scottish Local Authorities

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

Principals of Further and Higher Education Institutions

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Your ref:
Our ref: STSS Circular 2009/1

9 February 2009

Dear Sirs

TEACHERS' SUPERANNUATION (SCOTLAND) REGULATIONS 2005 (as amended)

Changes to Application Form RET 1 and RET 2 for Age, Premature (PRC) and Actuarially Reduced Pension (ARP) and inclusion of AW82

The purpose of this circular is to notify employers of changes that have been made to the application forms RET1, RET2 & AW82 and what the procedure is for the completion of these forms prior to sending to the SPPA for processing.

From 9 February 2009, Scottish Public Pensions Agency (SPPA) will introduce a new application form STSS: (RET) for Age, Premature and Actuarially Reduced Pensions. This can be downloaded from our website at http://www.sppa.gov.uk/scot_teachers/documents/STSSRETFormFeb2009.pdf. We will phase out the separate forms RET1, RET2 and AW82, and from 1 April 2009 SPPA will only accept retirement application forms on the new STSS: (RET) form. Any applications received after this date on the old forms will be returned to the employer. The new, single application form will consist of three sections, PART 1 which will be completed by the member as previously done on form RET1. Once PART 1 has been completed by the member they will pass the complete form to the employer. The employer will then complete PART 2 as previously done on form RET2. If the member is retiring on Premature grounds, PART 3 should also be completed as previously done on form AW82. The completed form should then be sent to SPPA at least 3 months [ideally 4 months] prior to the intended retirement date for processing of the award. Forms received within 3 months of retirement date will almost certainly not result in lump sum payments being paid within one month of the retirement date. Our reasons for making these changes are:-

- a) to ensure that complete applications are received by SPPA rather than, as is currently happening in many cases, forms being submitted with insufficient accurate information to allow the necessary pensions calculations to be performed properly
- b) to assist employers by ensuring that members are more aware of the importance of completing applications in time for employers to be able to compile the relevant information for submission at least 3 months [preferably 4 months] prior to intended retirement date
- c) to assist employers to be able to identify more easily if the member has indicated incorrect retirement type or date
- d) to reduce the need for chasing up employers for submission of RET 2 forms in cases where RET 1 forms have already been received by SPPA from the member

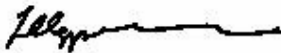
- e) controlled processing of awards will be more effective where all the information is readily available on a single application form

Any revised salary figures would also be provided on this form. The member would not be required to complete PART 1 again, but the employer would complete the member's Teacher's reference number and name. PART 2 would then be completed by the employer with the revised salary information then the form would be sent by them to SPPA.

If you have questions regarding the completion of the new form STSS: (RET), then please contact the Agency either by email at teachersbenefits@scotland.gsi.gov.uk or by telephoning our benefits section from your contact list prior to submitting the form.

Finally can I make a plea for early notification of your likely summer retirement numbers. In 2008 there were almost 3000 retrials, an increase of almost 100% on previous years, and advance warning of numbers would better able the Agency to make plans for handling the exercise. It is mainly because of the dramatic increase in summer retirements that we will require up to 4 months to process applications whereas previously a 3 month period of notice may have been sufficient.

Yours faithfully



Ian Clapperton
Director of Operations