

**TEACHERS' PENSION SCHEMES  
2019/06**

**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 Retirals

**The purpose of this circular is to:**

- **Confirm the process and information required for the summer retiral applications**

Following on from the success of the 2018 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 2019 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 2019, 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 in order 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 to 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 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 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 and a STPS02.

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## Local Authority Pay Award

We are aware of the ongoing discussions surrounding proposed pay increases for members who are paid by Local Authorities on the SNCT Pay Scales. We would recommend that you do not delay submitting retirement applications as this may result in these being classed as late applications. Once the salary scales are confirmed SPPA will begin to use the new scales for any cases where applications have been submitted by Local Authority employers under the previous SNCT pay scales. We will also look to carry out a review of cases processed over the summer towards the end of the year to pick up any that may have been processed prior confirmation of the revised SNCT Pay Scales.

## 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. The calculator was amended on 8<sup>th</sup> February 2019 to take into account updated factors. If you used the calculator prior to then for future retirements you may wish to review your calculations.

## Electronic submission of applications

We accept electronic submission of applications in order to help deal with the increase in workload. I would encourage employers to take advantage of this service, as it saves you time and money in addition to offering peace of mind in the knowledge that we have received the application the same day you send it. When submitting applications electronically, please check that the member has correctly completed Part 1 of the application prior to submission.

Applications need to be scanned and emailed to the SPPA on this email address [stssretirementapp@gov.scot](mailto:stssretirementapp@gov.scot). 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. If sent electronically we do **not** require a hard copy in the post as this duplicates work.

## 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](http://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. Deferred estimates will now be left until September.

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



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**Ewan Riddell**  
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**2 April 2019**

**Contact information**

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