

Teachers' Pension Scheme

2021/05

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 (May to September 2021)
Date:	18 February 2021

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

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 2021 exercise.

To allow for the timely payment of our members' pension benefits, we must receive applications with a retiral date between May and September 2021, no later than **three months** prior to the date of retiral. This will allow us the necessary time to check the members record, history details, calculate and authorise the award.

Paying the pension on time is dependent on accurate information being submitted on the application form. [Circular 2021/04](#) has just been issued regarding changes we have made to the retirement application form.

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

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 which includes supply work for at least one full day if they are intending to become re-employed as a teacher.
- that 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.
- that 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.
- that for phased retirements, please remember to complete and send a STPS01 and a STPS02.
- You can access the employer data portal here [SPPA Employers EDM](#).

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 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 a [premature calculator](#) on the employers section of our website for final salary benefits only. If there are CARE benefits, we will calculate the cost.

Electronic submission of applications

All applications should now be submitted electronically. 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. Please check there is a Part 2 for each contract.

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, provided they have supplied an email address.

Applications need to be emailed to the SPPA at stssretirementapp@gov.scot

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 remind you of our new estimate procedure to direct members looking for an estimate of their benefits to our secure [Online Services](#) to access their benefit statement. Members can use the information on their benefit statement for the [pension calculator](#). Your support and assistance is greatly appreciated.

Any questions?

Please contact linda.peebles@gov.scot or trudi.colebrook@gov.scot if you have any enquiries regarding this circular.