

STPS04 SERVICE CHANGE FORM

This new form has been created to simplify the way changes to service accrual are reported to SPPA.

Previously, when a member changed from part-time to full time working, employers submitted a leaver form (to end the part-time contract) followed by a starter form (to initiate the new full time contract).

From 1 April 2015 starter/leaver forms should **NOT** be used to report service changes. The STPS04 Service Change form should now be used for service changes the member may have throughout the year and will simplify this process.

If an employee changes from part-time (5, 6 or 7) to full-time (1) or from full-time (1) to part-time (5, 6 or 7) you should complete the STPS04 Service Change form. Ensure the Type of Service noted is correct for the effective date of change, e.g. a change from type of service 1 to type of service 5 would have type of service 5, not 1 in column 12 of the form as it's the type of service they are moving to, not the one they were on before the change.

All monetary fields on this form should be completed for the date/day prior to the service change date e.g. the member changes from full time to part time service on 07 July 2023. Your financial values would be up to and including 06 July 2023.

What you submit on an annual return has changed

If you submit the STPS04 Service Change form notifying changes for a member, we will still require the financial information for the **whole year**. Annual Return forms must be completed for every active member.

Where a member has left and re-joined the scheme mid-year, we require form STPS02 up to the point of leaving, and STPS01 for re-joining the scheme. In this circumstance we only require a **part year** annual return from the date of re-joining the scheme. The STPS02 will provide the financial information for the start of the year.

Multiple part-time contracts are now treated separately. Each contract must be identifiable by a unique Pay Reference number. The number must be a minimum of 10 characters and a maximum of 15. The first 10 characters should be unique. See example below:

Contract 1: Pay Reference = ABCDE1234500000

Contract 2: Pay Reference = SMITH061984

The member will now have 2 different contracts noted on their pension record.

Detailed instructions about how to complete each field are included below.

<u>Column No.</u>	<u>Description</u>	<u>Guidance For Form Filling</u>
Column 1	STPS04 Service Change Form	STPS04 is the title of the STSS Pension Member's Service Change form which should be completed by the employer's payroll department. Each cell in this column will be two digits, e.g. '04' 2 digits.
Column 2	Employer's Code	Employer's unique 5-digit code, e.g. 00501 = Smith Hall School. 5 digits.
Column 3	Superannuation Number	Scottish state schools have a legal requirement for all teachers employed in teaching to be registered with GTC Scotland. Each number is unique to the member. For colleges and private schools, SPPA will supply a 'Special Inclusion number' and will notify both the member and the employer. Enter as 000000 if unknown. 6 digits.
Column 4	Pay Reference Number	The member's pay reference number must be unique to each post and quoted on all correspondence. Where the member has two part-time posts, each post must have a different pay reference number. If pay reference numbers are not normally used by an employer, they must be constructed with a minimum of 10 digits and up to a maximum of 15 digits, PLEASE NOTE: Do not use zeros at the start of the pay reference number. For example: 00000SMITH12345 = incorrect SMITH1234500000 = CORRECT 15 digits.
Column 5	DOB	This is always written in DDMMYYYY format. For example, for someone born on 5 June 1956, the entry would be 05061956. 8 digits.

Column No.	Description	Guidance For Form Filling
Column 6	Title	<p>The member's title. Up to 4 character code detailing the member's title.</p> <ul style="list-style-type: none"> ▪ DR ▪ MISS ▪ MR ▪ MRS ▪ MS ▪ PROF ▪ REV ▪ SIR ▪ SR ▪ MX <p>Up to 4 digits.</p>
Column 7	Sex	<p>Enter 1 or M for Male and 2 or F for Female 1 digit / characters</p>
Column 8	Surname	<p>Member's surname in uppercase, e.g. BRYANT. Maximum 25 characters</p>
Column 9	Forename	<p>Member's first name in uppercase, e.g. FREDERICK. No initials. Full name is required Maximum 25 characters</p>
Column 10	Middle Name Initials	<p>Member's initials in uppercase, e.g. A space B space C 3 characters</p>
Column 11	National Insurance Number	<p>This is the members unique identifier to track their personal contributions to the UK social security system. Use a valid NI number format, e.g. AB123456C 9 characters</p>
Column 12	Type of Service	<p>If a person changes from part-time (5, 6 or 7) to full-time they must complete a code 1 in this field. OR E.g. If a person changes from full-time (1) To part-time (5, 6 or 7) they must complete code 5, 6 or 7 in this field.</p> <p>As this is a "Service Change" form this code represents the remainder of the service year from the service change date onwards. If the service change from part-time to full-time occurs on 07/06/2023 then the member would have code 1 from then until 31/03/2024.</p> <p>1 = Full time – full time days should be completed, not part-time hours or full time hours</p> <p>5 = 1200 hours max per year – full time hours column should not be completed, left as 0000</p> <p>6 = 1400 hours max per year - full time hours column should not be completed, left as 0000</p> <p>7 = Non-standard contracts - full time hours should be completed. 1 digit.</p>

<u>Column No.</u>	<u>Description</u>	<u>Guidance For Form Filling</u>
Column 13	Employee Contribution Rate	Member's contribution rate at/on date of change Rate should be entered in format 0000, e.g. 0720 for 7.2% or 1040 for 10.4%. 4 digits.
Column 14	Full-time Days	The number of Full time Days worked. Actual days worked, up to a maximum of 365. This should be the days up to the last day of the old contract. 3 digits.
Column 15	Part-time Hours	This column should be completed for those who work part time. Actual hours worked up to a maximum for their full-time hours. This should be the part time hours up to the last day of the old contract. 4 digits.
Column 16	Full-time Hours	Full time hours completed prior to date of service change for part time member only. Hours must be greater than zero. e.g. 1200, 1400, 1365, 1820. 4 digits.
Column 17	Employee's Pensionable Pay	Member's Pensionable pay without overtime. Any pay earned by overtime should be included in Column 18 only (CARE Pensionable Pay). This is a mandatory field. This is the amount of pay upon which the member has paid contributions from 1 April (or the date they started in the Scheme if later) to 31 March of the following year, inclusive. BOTH EMPLOYEES PENSIONABLE PAY AND CARE PENSIONABLE PAY SHOULD BE COMPLETED. Please complete this in a £££££pp format, entering zeros in any unused boxes. For example, enter £58859.60 as 05885960. Do not enter a decimal point. 8 digits.

Column No.	Description	Guidance For Form Filling
Column 18	CARE Pensionable Pay	<p>Pensionable Pay including overtime. This field will always be equal to or greater than Pensionable Pay and is used to calculate benefits accrued under CARE.</p> <p>BOTH EMPLOYEES PENSIONABLE PAY AND CARE PENSIONABLE PAY SHOULD BE COMPLETED.</p> <p>Please complete this in a £££££pp format, entering zeros in any unused boxes. For example, enter £58859.60 as 05885960. Do not enter a decimal point.</p> <p>8 digits.</p>
Column 19	Employee's Pensionable Pay/Notional	<p>Complete only if the member's earnings are reduced; Notional pay, i.e. the pay figure they could have earned but didn't (e.g. maternity and sick pay). Up to and including date prior to service change.</p> <p>Please complete this in a £££££pp format, entering zeros in any unused boxes. For example, enter £27091.68 as 02709168. Do not enter a decimal point.</p> <p>8 digits.</p>
Column 20	Employee's Pension Contributions	<p>This is the actual amount of contributions paid or the amended contributions from 1 April (or the date the employee started in the scheme if later) to 31 March or the date of leaving</p> <p>The percentage must be in accordance with the corresponding contribution table and applied to the figure entered at column 17 and/or 18 for the year you are amending.</p> <p>Please enter it in a £££££pp format, putting zeroes in any unused boxes. For example, enter £1459.00 as 0145900. Do not enter a decimal point.</p> <p>7 digits</p>
Column 21	Employer's Pension Contributions	<p>This is the actual amount of contributions or the amended contributions from 1 April (or the date the employee started in the scheme if later) and 31 March or the date of leaving.</p> <p>It is a % of the figure entered at column 17 and/or 18 (currently 23.0%). However, certain factors may influence the amount on which the rate is calculated.</p> <p>Enter figures in a £££££pp format, putting zeroes in any unused boxes. For example, enter £1459.23 as 0145923. Do not enter a decimal point.</p> <p>7 digits</p>

<u>Column No.</u>	<u>Description</u>	<u>Guidance For Form Filling</u>
Column 22	Additional Percentage Contributions	<p>This is the amount of contributions or amended contributions a member has paid for Added Years, Faster Accrual and Early Retirement Reduction Buy Out (ERRBO).</p> <p>Complete it in a £££££pp format entering zeroes in any unused boxes. For example enter £325.75 as 0032575. Do not enter a decimal point.</p> <p>7 digits.</p>
Column 23	Additional Pension Contributions	<p>This is the amount of contributions or amended contributions a member is paying for an Additional Pension contract.</p> <p>Complete it in a £££££pp format entering zeroes in any unused boxes. For example enter £325.75 as 0032575. Do not enter a decimal point.</p> <p>7 digits</p>
Column 24	Salary Rate at Date prior to Service Change	<p>Full time annual salary rate at date of change e.g. part-time to full time or vice versa. Where member is part-time, the full time equivalent salary rate must be used.</p> <p>Please complete this in a £££££pp format For example, enter £59,000 as 05900000. Do not enter a decimal point.</p> <p>8 digits.</p>
Column 25	Effective Date of Change	<p>This is the date the member starts their new contract. This should not be the end date of the old contract.</p> <p>Accepted in the following format, e.g. for someone changing on 1 January 2024, the entry would be 01012024. This should never be the end date of the old contract.</p> <p>Always written in DDMMYYYY format Do not enter a decimal point.</p> <p>8 digits.</p>
Column 26	Contributions on a Higher Salary	<p>Contributions earned on a higher salary rate up to and including date prior to service change (other than the basic). This column is rarely used.</p> <p>Please complete this in a £££££pp format, entering zeros in any unused boxes. For example, enter £6,000.00 as 0600000. Do not enter a decimal point.</p> <p>7 digits.</p>
Column 27	Notes	<p>Any relevant comments the employer wishes to include regarding members' leaver details.</p> <p>200 characters</p>