

## Teachers' Annual Returns 16-17 - Readiness

### Are you ready?

To ensure readiness for 2016-17 Annual Returns we have put together some important information to help you better prepare for your submissions this year.

In 2015-16 a number of your members did not receive an Annual Benefit Statement (ABS) or may have been delayed in receiving refunds, transfers and pension awards due to either late or incorrect data being submitted by employers.

Please take the time to read the following helpful information to help make 2016-17 submissions better for everyone:

### Starters

An annual return, which provides a record of members service, salary, pensionable pay and contributions paid in a year (1 April to 31 March), can only be recorded on a members record if they have an active employment. If you haven't already done so, you should submit a starter form to us for each active pensionable contract of employment that the member holds, whether this is 2 x part-time posts or one full-time post. Each starter form should therefore contain a respective unique reference number and must always be submitted before submitting an annual return.

### Pay References

Each employment **must** be identified by a unique Pay Reference Number. This can be up to 15 alphanumeric characters, although at least the first 10 digits must be unique to that post. You should use this number throughout the active life of the relevant employment.

### Changing Pay Reference

Once you have notified us of the Pay Reference Number this must be used every time you make a submission and shouldn't ordinarily change throughout the active life of the employment. If you need to change the reference number for any reason you must notify us as any information submitted with a different pay reference to what we hold cannot be matched to the correct record. If you do chose to change the Pay Reference number please use the [STPS Pay Reference Update](#), which you will need to submit via the secure messaging facility on the EDM Portal.

## Tapered Protection

For members who held tapered protection within the Scottish Teachers' Superannuation Scheme which has ended prior to 1 April 2017, you need to submit a leaver form for the protected part of the employment in that scheme, and a starter form for the unprotected employment in the Scottish Teachers' Pension Scheme 2015, or CARE scheme as it is sometimes known. In this scenario the annual return should **only** contain information for the part-year employment in the new CARE scheme as you will have already reported the service prior to this within the leaver form.

## Leavers

If a member left the scheme between 1 April 2016 and 31 March 2017 you should have sent a leaver form for the period 1 April 2016 to the leaving date.

There is no need to submit an annual return for these members as they are not in active membership as at 31 March 2017.

## Service Changes

A service change form should be used to report a change to the basis of service a member holds, if moving from full-time to part-time employment, or vice versa. Failure to report this can result in a members pension being incorrectly calculated. For such cases you should calculate the annual return based on the **full year** using the current basis of service, which may result in you having to convert service from days to hours or vice versa. Full guidance can be found on the accompanying annual return checklist.

## Data Submission

All annual returns must be submitted through the Employer Data Management (EDM) portal. All employers should now have a registered EDM principle user and possibly a number of basic users. We have a dedicated team of advisors to assist with any concerns you may have in using the EDM portal.

Please phone: **01896 893000 (ask for EDM)**

Alternatively you can email: **sppaedm-enquiry@gov.scot**

## Data Accuracy

Particular emphasis is placed on data accuracy before sending your submissions. The Public Service Pensions (Record Keeping and miscellaneous amendments) regulations 2014 enforceable from 1 April 2015 sets out the records which Public Service pension schemes are required to maintain. Underpinned by the Pension Regulator's Code of Practice for Public Sector Pension schemes, we have a clear duty in maintaining accurate records for members.

The EDM system has a number of validations that are designed to ensure that all relevant data fields have been completed and in the correct format. If the data fails the validation stage, even for one member, then this will cause the **whole** file to fail until the errors are fixed.

**As always we are here to help you, so you can help us, please do not hesitate to contact us if you have any queries with any of the information provided.**