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Auto enrolment and staging

Our Frequently Asked Questions below will help you answer many of your common questions about Auto Enrolment and Staging.

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What is Auto Enrolment?

Changes to pension law now affects all employers in the UK as employees must automatically enrol into a workplace pension scheme.

The Teachers' Pension Scheme is the scheme for teachers and lecturers who ordinarily work in the UK. Employees may choose to 'opt out' of the Scheme, but only after they have been enrolled by you.

The Staging Date for the largest employers started in 2012, with other employers coming on board at Staging Dates to 2018. A further requirement of Auto Enrolment is that employers re-enrol those who have opted out every three years.

Information provided by us is to assist the employer with their duties in respect of teachers and the Auto Enrolment of existing teachers who are eligible jobholders and are not currently in the Scheme.

Our information makes reference to the employer's staging date. However, the employer can bring the staging date forward by contacting the Pensions Regulator at least one month before the earlier staging date at customersupport@autoenrol.tpr.gov.uk

The employer's enrolment duties can be postponed by up to 3 months and/or you can apply transitional delay to 30 September 2017, thereby postponing Auto Enrolment until 1 October 2017.

Detailed guidance to the employers' duties can be found on the Pensions Regulator's website, including information about postponement and transitional delay.

What is a Staging Date?

A Staging Date is the start date of the employer's Auto Enrolment duties.

Where there are a number of employers in a group, the Staging Date will be that of the largest PAYE reference. For the purposes of the Teachers' Pension Scheme the employer for maintained schools including voluntary aided and foundation schools is the Local Authority. This is different to the Auto Enrolment legislation where voluntary aided and foundation schools may be deemed to be the employer and potentially have a different staging date to the Local Authority. Local Authorities may wish to discuss with those individual

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schools requesting a common Staging Date and administering Auto Enrolment on their behalf.

For people employed as a teacher or lecturer they should be contractually enrolled into the Teachers' Pension Scheme (providing the employer is one covered by the Scheme).

All employers are required to register with the Pensions Regulator shortly after their Staging Date - this can be done **online**.

The Pension Scheme Registry number for the Teachers' Pensions Scheme is 10005209.

How do I find out about my Staging Date?

You can find out when your Staging Date is by visiting the **Pensions Regulator's website**.

Where there are a number of employers in a group, the Staging Date will be that of the largest PAYE, hence maintained schools will come under the Local Authority's Staging Date.

I thought everyone employed as a teacher was already enrolled in the Teachers' Pension Scheme is that not the case?

People who entered employment which is pensionable under the Teachers' Pension Scheme on or after 1 January 2007 are automatically members of the Scheme unless they opt out, in addition some part-timers who were in post before then and some teachers who returned to work before 1 January 2007 after claiming retirement benefits have not to date been automatically enrolled in the Scheme.

Do I have to ask all my teachers to complete a form to join the Teachers' Pension Scheme?

No, existing members don't need to complete an application form to join the Scheme. However, if you're contractually enrolling new starters, a TR6 form should be completed via the Employer Portal.

Auto Enrolment will apply to existing employees who aren't in pensionable employment and are 'eligible jobholders', that is those who are aged 22 to state pension age, earning over £10,000 a year and:

- Have previously opted out
- Commenced a part-time contract before 1.1.07, did not make a part-time election and have continued in that contract (without taking up other pensionable employment that would have had the effect of making all of their employment pensionable)
- This includes pre 1.4.97 ill-health retirees from when they reach age 60 or cease to be incapacitated, whichever is the earliest
- Become re-employed before 1.1.07, didn't make an EFE election and have continued in that contract (without taking up other pensionable employment that would have had the effect of making all of their employment pensionable).

You must complete an Auto Enrolment template via the Employer Portal for any employees whom you are auto enrolling into the Scheme. We'll be able to confirm if any of these people then decide to opt out of the Teachers' Pension Scheme.

Remember, even those members who opt out should still be recorded on your Annual Service Return.

Do all schools share the Local Authority's staging date?

It's likely that most of the schools will still have the same Staging Date as the Local Authority, but not all do. The reason for this is that Staging Dates are based on the number of people in their PAYE scheme as at 1 April 2012. The number of people in a PAYE scheme is wholly based on the information held by us, received from HMRC, at 1 April 2012. Where schools share the Local Authority's PAYE scheme, their Staging Date will be the same as the Local Authority's.

The exceptions to this are: i) where the school was not using the Local Authority's PAYE as at 1 April 2012, but had their own PAYE scheme, then it will have its own Staging Date - or ii) where the school has converted to an Academy and the Academy will be a new employer with a new Staging Date.

More about Staging Dates can be found [here](#).

Does a change of PAYE scheme change my staging date?

No, if your (school or Local Authority) change your PAYE scheme this will not change your Staging Date. For example, if the Council outsources their payroll and they set up a new PAYE scheme their Staging Date will remain the same.

The only situation where you would get a new Staging Date is if your status changes and you become a new legal employing entity. The most likely reason for this is because you convert to an Academy.

For more general FAQs on Auto Enrolment see:
<http://help.thepensionsregulator.gov.uk/faq/>

I read on the Pensions Regulator's website that anyone earning above a certain amount has to be automatically enrolled, how does this affect supply teachers whose earnings cannot be forecast?

Enrolment in the Teachers' Pension Scheme is not dependent on earnings. People who entered employment which is pensionable under the Scheme on or after 1 January 2007 are automatically members regardless of earnings. With effect from 1 October 2012 the minimum age for membership of the Teachers' Pension Scheme is 16. The maximum age remains 75.

If a person has opted out under the Teachers' Pension Scheme legislation after an employer's Staging Date then the employer must monitor that individual. If they reach any of the trigger points of age or **earnings** the individual will be subject to Auto Enrolment. They can opt out again.

If a member opts out within one month that is considered to be under the Auto Enrolment provisions.

If a member opts out within 3 months that is considered to be under the 'contractual' Scheme arrangements and it's intended that the Scheme provisions continue to apply.

What is an Auto Enrolment exception?

It's optional whether to Auto Enrol or Auto Re-enrol an eligible jobholder who opted out within the 12 months prior to the Enrolment / Re-Enrolment date.

It's optional whether to Auto Enrol or Auto Re-enrol an employee who has given notice or been given notice of the end of their employment.

You don't have to Auto Enrol or Auto Re-enrol an employee if you have reasonable grounds to believe the employee is protected from tax charges on their pension savings under HMRC protections.

Further information and other exceptions can be found [here](#).

What is Automatic Re-enrolment?

Every three years you'll need to put members of the Teachers' Pension Scheme back into the Scheme if they opted out and are an eligible job holder (and if you're not applying an Auto Enrolment exception to them). This is known as Automatic Re-enrolment. The Pensions Regulator will write to you in advance of your Automatic Re-enrolment date to remind you.

More about Automatic Re-enrolment can be found [here](#).

Who needs to complete the Declaration of Compliance?

This will depend on who the employer is. You can find out who the employer is by checking what's written on the employee's contracts of employment. If on the contract of employment the school is listed as the employer, then the school will need to complete their own declaration. They can still add the Local Authority PAYE scheme to their declaration. If the contracts say the Local Authority is the employer, then the school's staff should be included in the workforce numbers for the Council's declaration. The school will not need to do a separate Declaration of Compliance.

More about Declaration of Compliance can be found [here](#).

Forms

Looking for a Form? Our forms page has everything you'll need to get started.

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