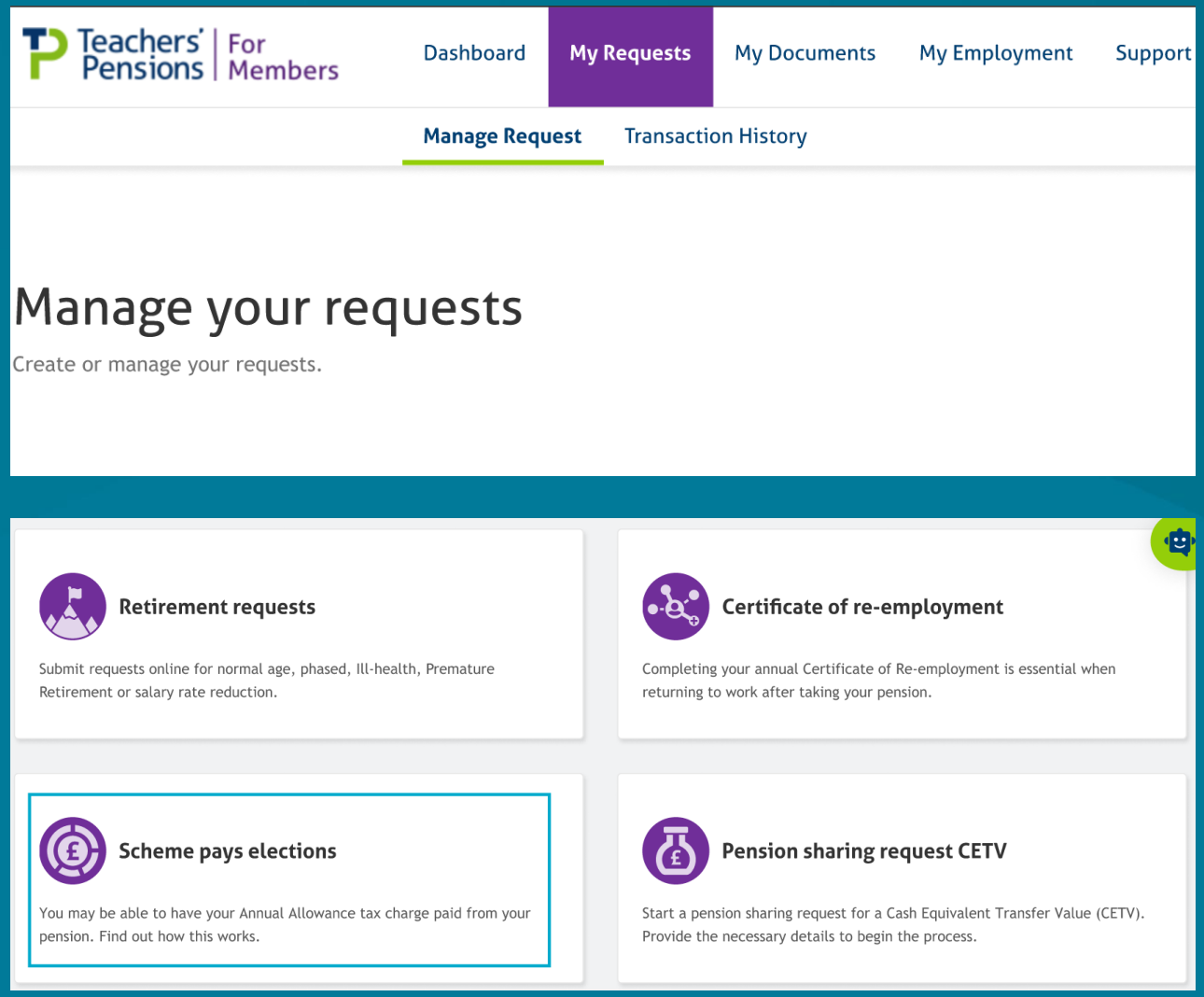


Teachers' Pensions

My Pension Online Scheme Pays Election

October 2026 v0.1

How to access - Scheme Pays Election



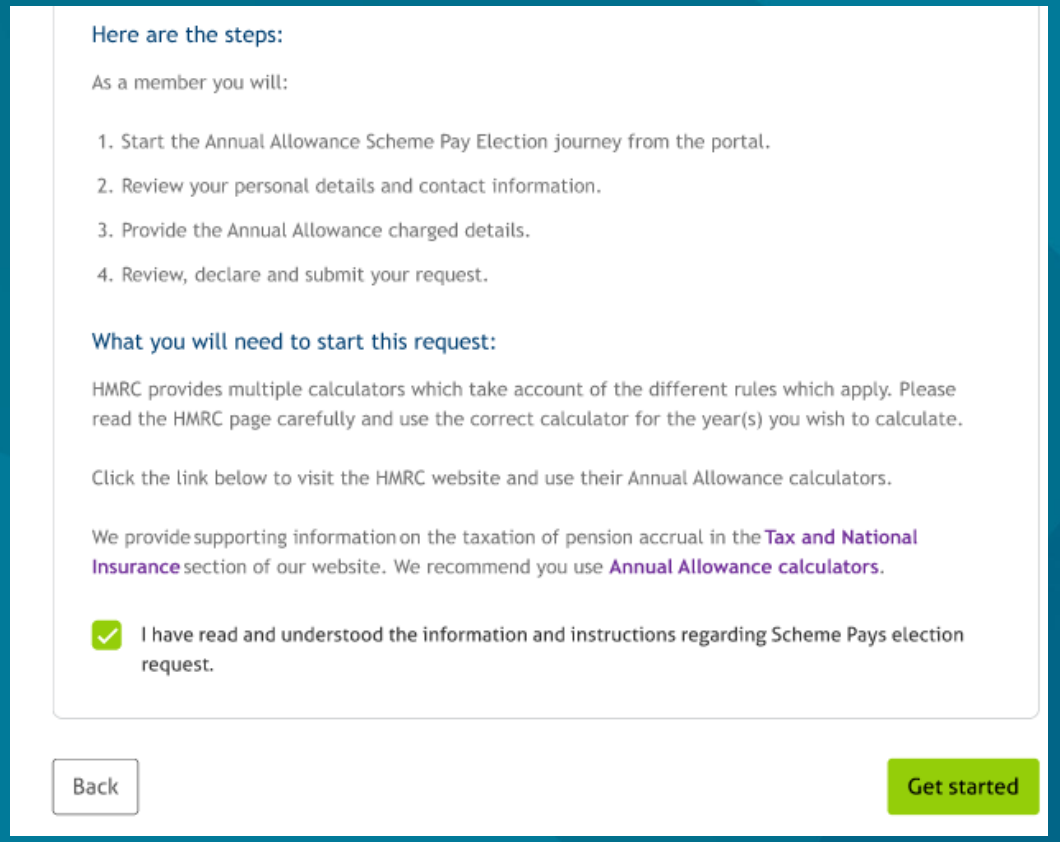
This form should be used if you'd like the Teachers' Pension Scheme to pay an Annual Allowance charge because of your excess pension savings in the Scheme, subject to Scheme rules and eligibility.

To start a 'Scheme Pays Election:

- Log in to My Pension Online (MPO).
- From the top navigation menu, select 'My Requests'.
- Ensure you are on the 'Manage Request' tab.
- Scroll down and click on the relevant application.

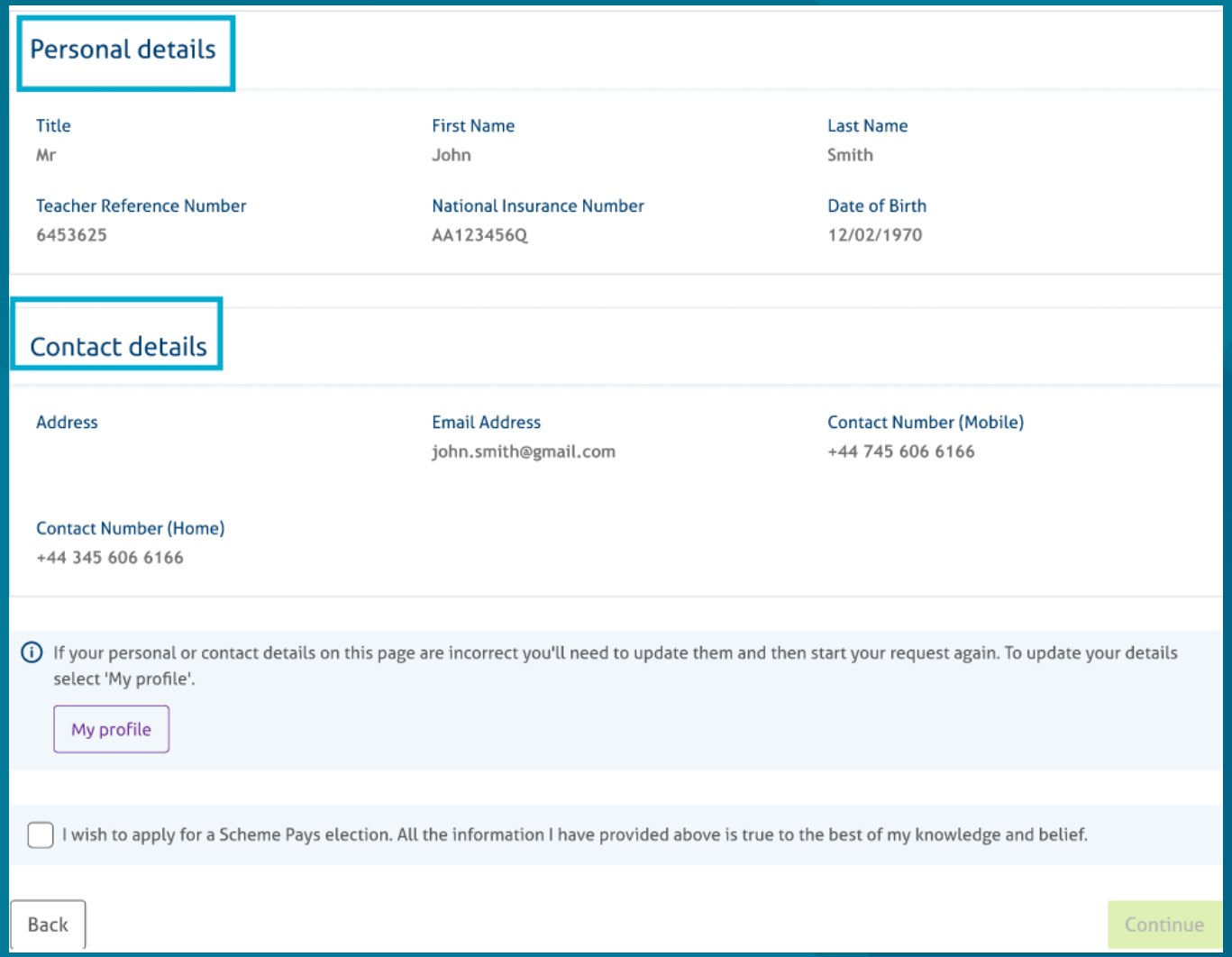
Completing the Scheme Pays Election application

- Before starting a 'Scheme Pays Election' request, review the eligibility criteria and guidance provided on this page.
- To continue, confirm that you have read and understood the guidance by selecting the checkbox and then click 'Get Started'.



Completing the Scheme Pays Election application

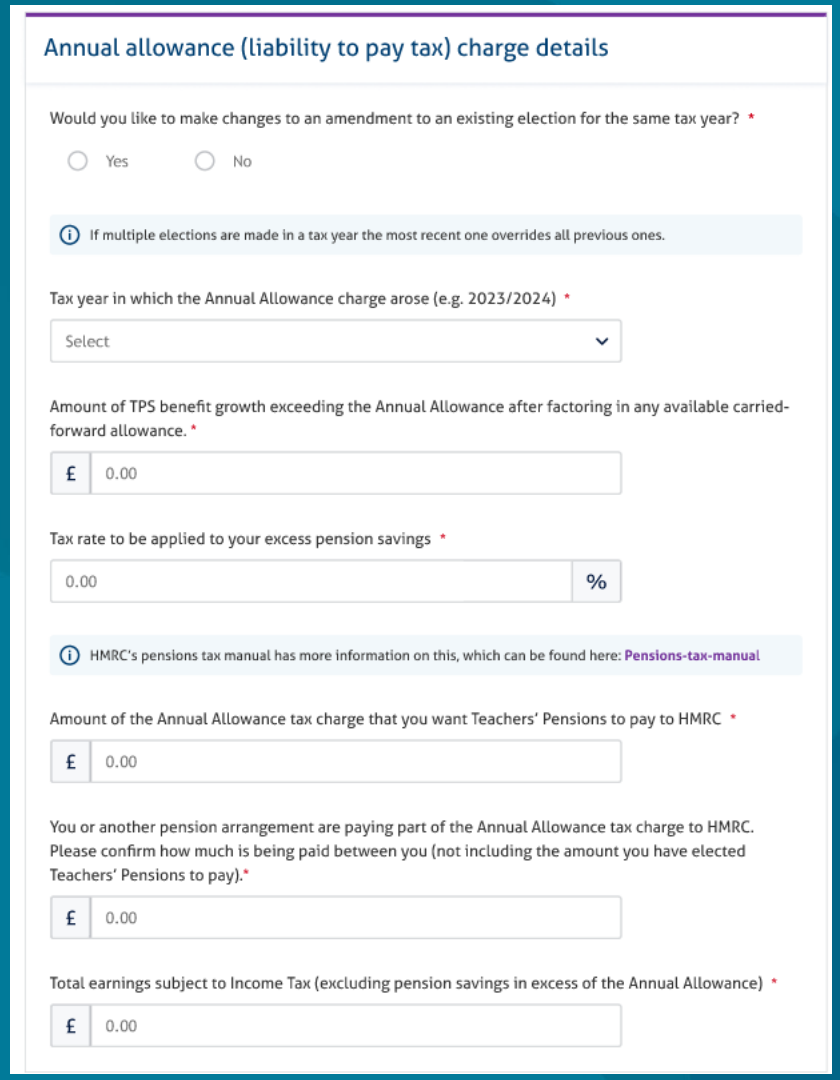
- Before proceeding with your 'Scheme Pays Election' request, review your personal and contact information to ensure it is accurate.
- If any information is incorrect, select '**My Profile**' to update your details, then restart the request.
- Read the declaration and tick the checkbox to confirm that you wish to apply for a 'Scheme Pays Election' and that the information provided is correct.
- Click 'Continue' to move to the next step of the request.



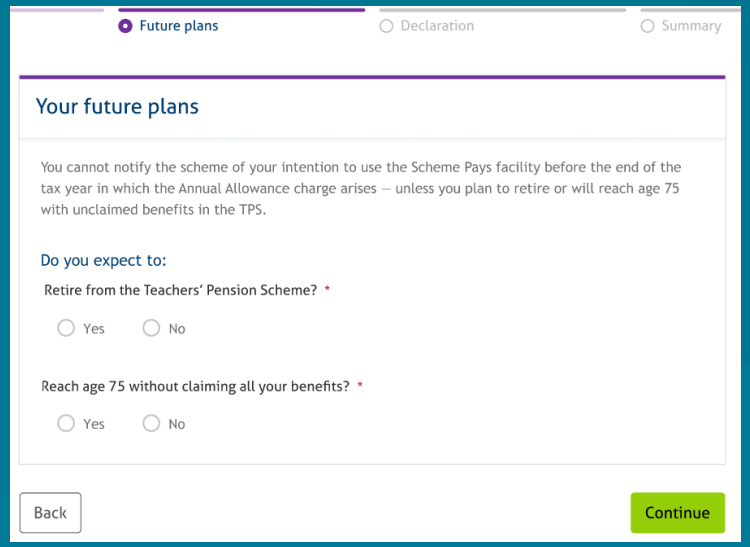
Completing the Scheme Pays Election application

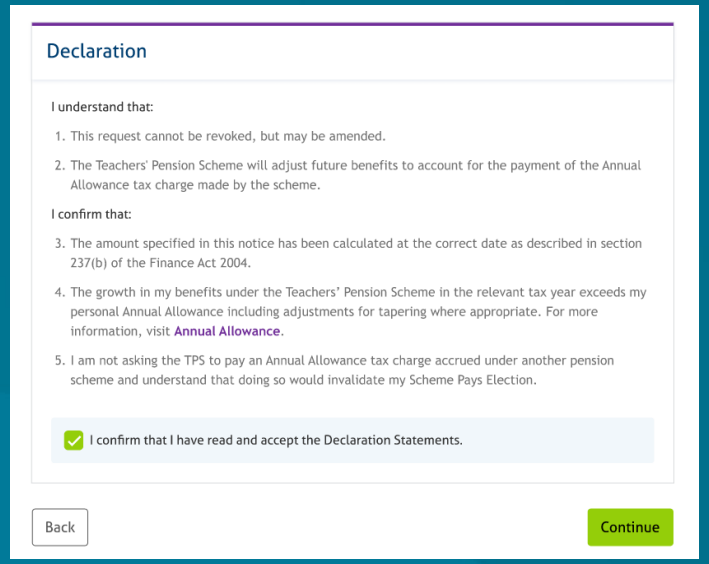
Step 1: Annual allowance (liability to pay tax) charge details.

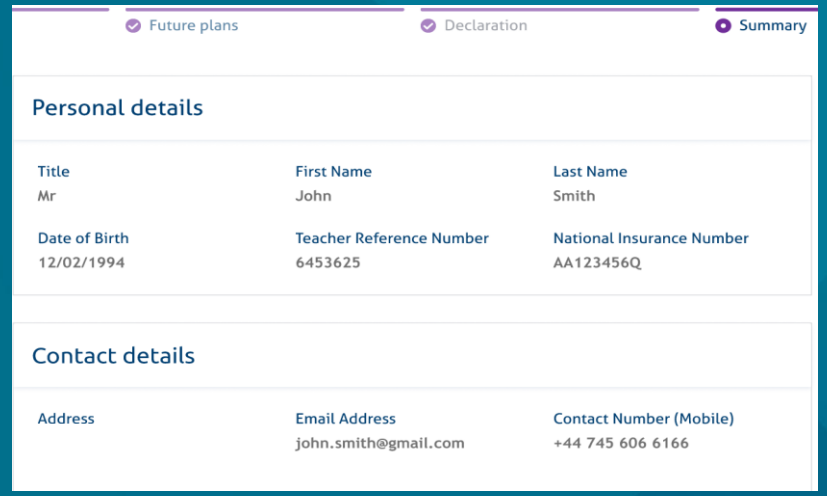
- On this page, provide the required information.
- Important: If more than one election is submitted for the same tax year, the most recent election will replace any previous election.
- Once all details have been entered and reviewed for accuracy, click 'Continue' to proceed..



Completing the Scheme Pays Election application







Step 2: Future plans

- You'll need to provide information about your future retirement plans as part of the application.
- Once you have answered both questions and reviewed your responses, click 'Continue' to proceed.

Step 3: Declaration

- On this page, review and accept the declaration statements related to your 'Scheme Pays Election' request.
- Once the 'Declaration' has been accepted, click 'Continue' to proceed to the 'Summary' page and review your request before submission.

Step 4: Summary

- On this page, check each section carefully to ensure all information is accurate and complete.
- If you need to make any changes, select 'Edit' next to the relevant section and update the information.
- Once you are satisfied that all information is correct, click 'Submit'.

Completing the Scheme Pays Election application

Step 5: You'll then see a confirmation page.

- A unique reference number is provided, which can be used to track the progress of your request.
- You can select 'View transaction history' to view your application status.
- In 'Transaction History', you can search for your request using the reference number, check its status, and view any updates or remarks.
- Alternatively, select 'Return to dashboard' to exit the process and return to the main Dashboard.

