



Employer Portal - Managing members



Employer Portal and managing members

This guide will cover:

- basic features within the Employer Portal (password/personal details changes)
- using the secure mailbox
- finding and looking at the member service print
- updating member details
- completing member applications (initiated by the employer).

Employer Portal

Welcome to your dashboard:

- menu to navigate to functions
- establishment drop down
- tasks awaiting action
- quick links
- social media links.



Dashboard

Member

Monthly Submission

Payroll

Support

 Secure Mail

 Profile



Welcome, Michael

Here is your dashboard to keep you up to date.

Establishment Name

Livingstone primary school 009/1234

[View Establishment Profile](#)

 Tasks

TRN	Task Reference	Task Name	Submitted On	
2514932	2536	Salary update for Phased retirement	21/01/2024	
1937219	7483	Salary update for Premature retirement	20/10/2023	
8320128	1532	Salary update for Retirement request	11/09/2023	
1724192	8342	Salary update for Transfer-in request	09/08/2023	
1526012	0162	Salary update for Opt-out election request	10/05/2023	
1526012	0162	Review of Flexibilities request	10/05/2023	

[View all](#)

Managing members

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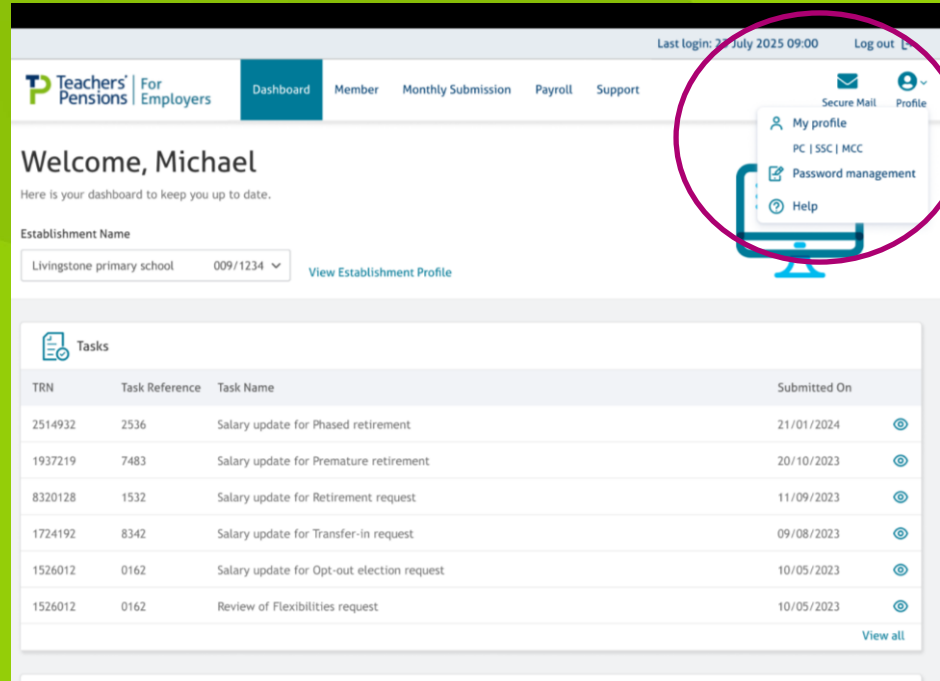
Copyright © Teachers' Pensions 2025. All rights reserved. Pension Scheme Registry Number 10005209 (2010 scheme and earlier) and 10276733 (2015 scheme)



Using the Employer Portal

If you need to update your personal details or need to reset your password/MFA, you can use the 'Profile' link on the right-hand side.

You can pick the relevant option from the drop-down box.



Teachers' Pensions | For Employers

Dashboard Member Monthly Submission Payroll Support

Last login: 20 July 2025 09:00 Log out

Secure Mail Profile

My profile
PC | SSC | MCC
Password management
Help

Welcome, Michael

Here is your dashboard to keep you up to date.

Establishment Name

Livingstone primary school 009/1234 [View Establishment Profile](#)

Tasks

TRN	Task Reference	Task Name	Submitted On
2514932	2536	Salary update for Phased retirement	21/01/2024
1937219	7483	Salary update for Premature retirement	20/10/2023
8320128	1532	Salary update for Retirement request	11/09/2023
1724192	8342	Salary update for Transfer-in request	09/08/2023
1526012	0162	Salary update for Opt-out election request	10/05/2023
1526012	0162	Review of Flexibilities request	10/05/2023

[View all](#)

My Profile

Teachers' Pensions For Employers

DashboardMemberMonthly SubmissionPayrollSupport

Secure MailProfile

Last login: 23 July 2025 09:00Log out [+]

[Back](#)

Mr. Michael Parker 

Role

Primary contact, Services and Salary Contact, Monthly Contribution Contact

Contact details

Edit 

Address (UK) Active	Email Address	Contact Number (Mobile)
11b Lingfield Point, Darlington DL1 1AX, United Kingdom	michael@oxfordedu.com	+44 712 506 6166

This is the page to update your personal details
Please note - any role changes for your role or your establishment need to be made via the 'Manage contacts' section of the Portal.

Teachers' Pensions For Employers

DashboardMemberMonthly SubmissionPayrollSupport

Secure MailProfile

Last login: 23 July 2025 09:00Log out [+]

[Back](#)

Password management

Here you can manage or reset your password and authentication settings to keep your account secure.



Account security

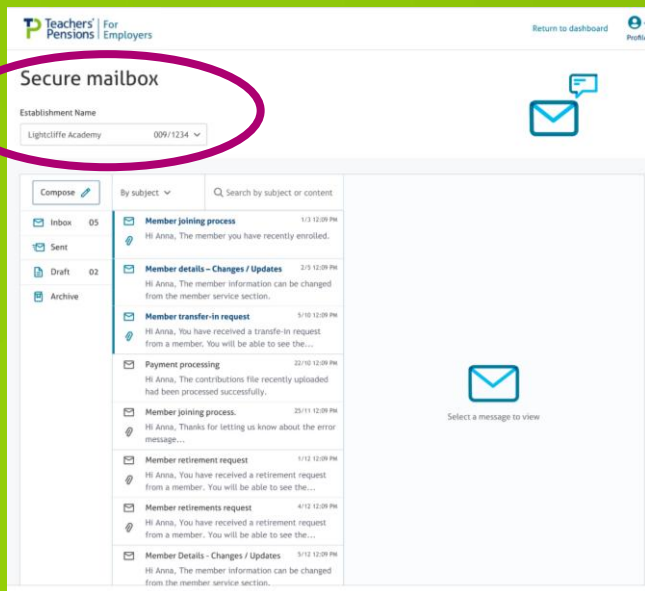
These are the methods you use to sign into your account or reset your credentials.

Change password

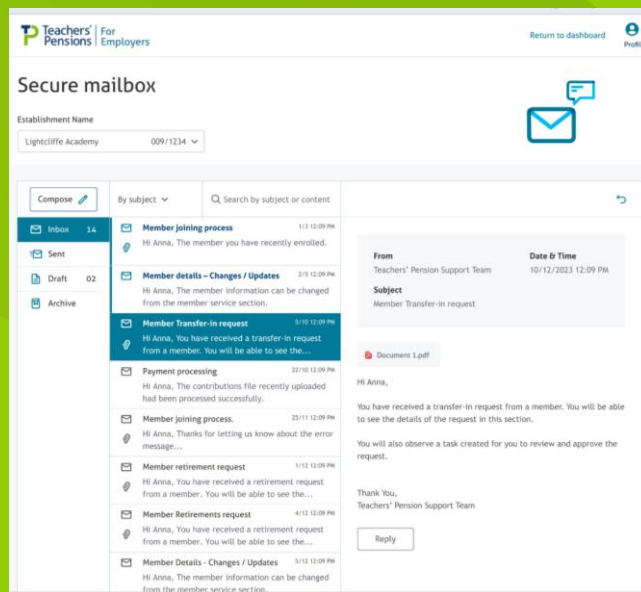
Reset multi-factor authentication (MFA)

This is the page to update your password/MFA option.

Secure messaging

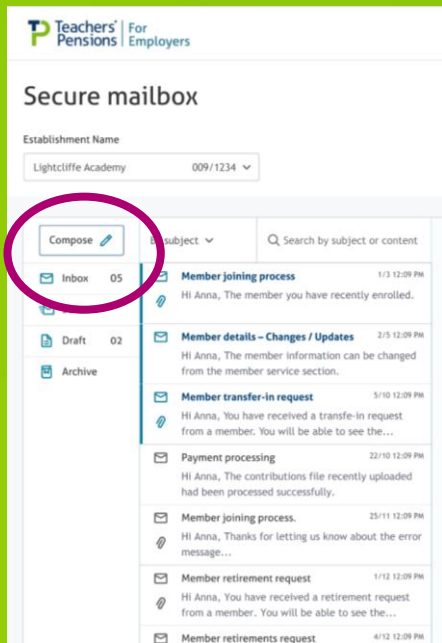


Within the Portal, you'll be able to contact us via 'Secure messaging'.

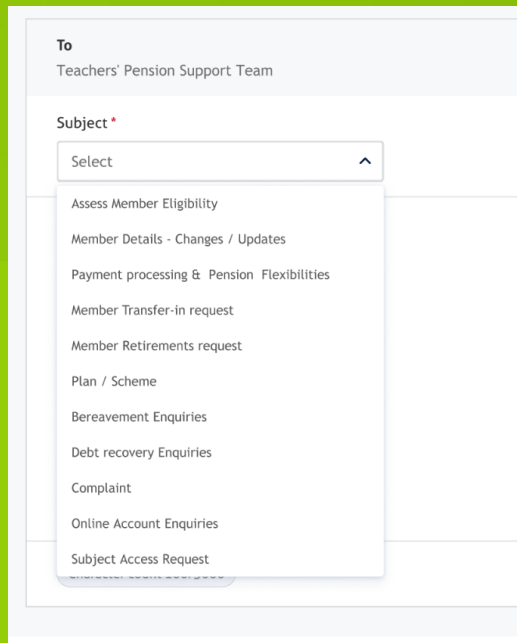


Similar to Outlook you will have an inbox, sent items and drafts. Messages are auto-archived after three months.

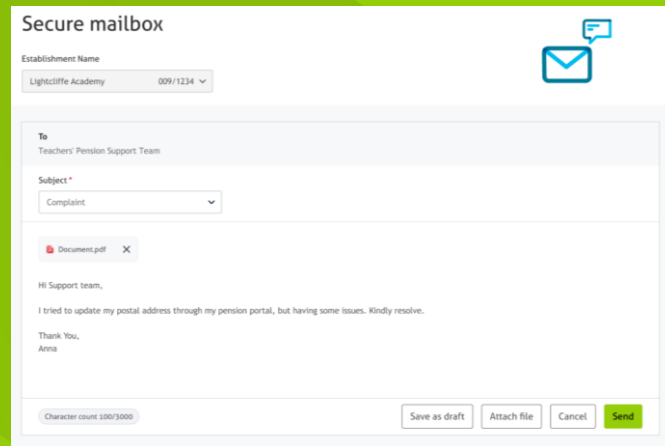
Secure messaging



To send us a message click
'Compose'.



Select the subject.



Write your message and add any
necessary attachments.

Support

Teachers' Pensions For Employers

Dashboard Member Monthly Submission Payroll **Support**

Last login: 23 July 2025 09:00 Log out

Secure Mail Profile

Reports Document Centre

See all your reports

Securely download reports from Teachers' Pension Scheme to your device.

Establishment Name

Livingstone primary school 009/1234

You can download the following reports:

Filename	Description	Available Since
January membership report.csv	January membership report	12/10/2019 16:23
January contributions report.csv	January contributions report	11/10/2020 16:23
March assets report.csv	March assets report	10/10/2022 16:23

Teachers' Pensions For Employers

Dashboard Member Monthly Submission Payroll **Support**

Secure Mail Profile

Reports **Document Centre**

Document centre

You can view and download the correspondence sent to you.

Establishment Name

Livingstone primary school 009/1234

Period: Pre Oct 2026 (Historical)

Document type: Select

Search by TRN

Document Name	Transaction Type	Teacher Reference Number	Received Date
Transfer Out_communication_salary and service	Transfer out	22351312	01/02/2025 13:23
Bereavement_communication_salary and service	Bereavement	24351312	01/02/2025 13:23
Transfer in_communication_salary and service	Transfer in	11351312	01/02/2025 13:23

In the Support section you'll be able to see reports and documents.

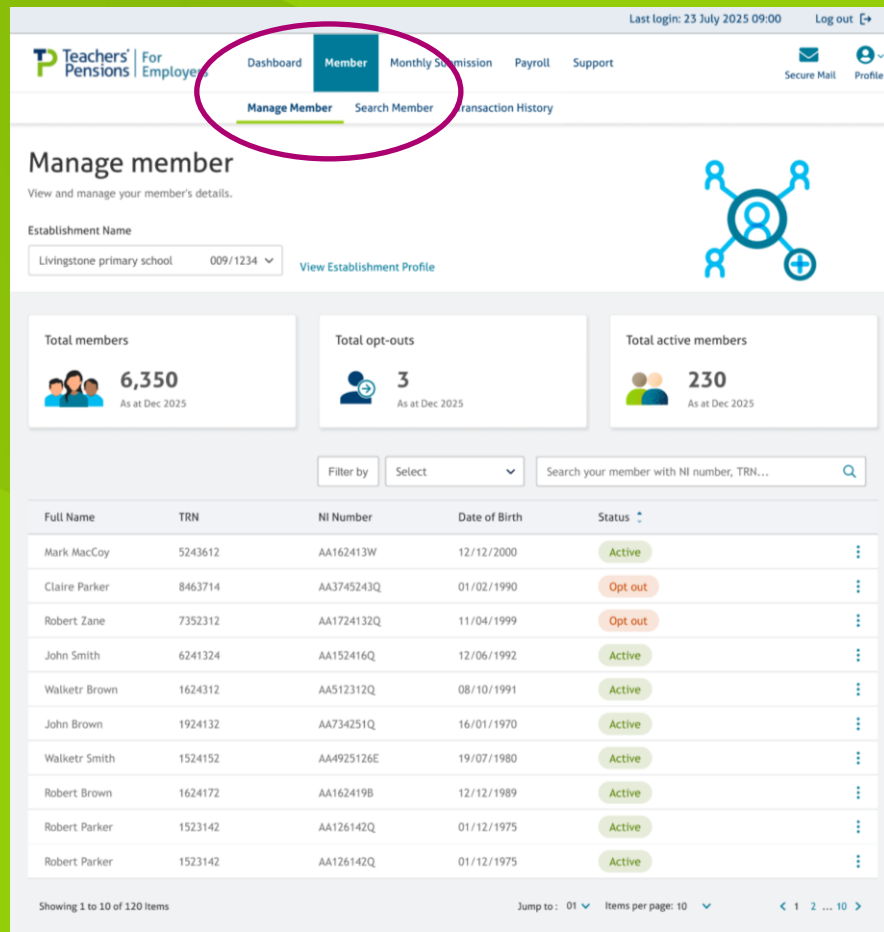
Managing members

Managing members

Click on the 'Member' tab in the main menu and then 'Manage Member' in the sub menu.

On the 'Manage Member' page you will be able to:

- complete a member search
- view a service print
- change member details
- raise a death notification
- initiate a member application (for certain applications).



Teachers' Pensions For Employers

Last login: 23 July 2025 09:00 Log out [+]

Dashboard **Member** Monthly Submission Payroll Support

Manage Member Search Member Transaction History

Manage member

View and manage your member's details.

Establishment Name
Livingstone primary school 009/1234 [View Establishment Profile](#)

Total members
6,350
As at Dec 2025

Total opt-outs
3
As at Dec 2025

Total active members
230
As at Dec 2025

Filter by Select Search your member with NI number, TRN...

Full Name	TRN	NI Number	Date of Birth	Status
Mark MacCoy	5243612	AA162413W	12/12/2000	Active
Claire Parker	8463714	AA3745243Q	01/02/1990	Opt out
Robert Zane	7352312	AA1724132Q	11/04/1999	Opt out
John Smith	6241324	AA152416Q	12/06/1992	Active
Walketr Brown	1624312	AA512312Q	08/10/1991	Active
John Brown	1924132	AA734251Q	16/01/1970	Active
Walketr Smith	1524152	AA4925126E	19/07/1980	Active
Robert Brown	1624172	AA162419B	12/12/1989	Active
Robert Parker	1523142	AA126142Q	01/12/1975	Active
Robert Parker	1523142	AA126142Q	01/12/1975	Active

Showing 1 to 10 of 120 items Jump to: 01 Items per page: 10 < 1 2 ... 10 >

Member search

You can search for a member using either 'Search Member' in the sub menu or use the search function on the 'Manage Member' page.

Teachers' Pensions For Employers

Dashboard Member Monthly Submission Payroll Support

Manage Member Search Member Transaction History

Manage member

View and manage your member's details.

Establishment Name

Livingstone primary school 009/1234 [View Establishment Profile](#)

Total members 6,350 As at Dec 2025

Total opt-outs 3 As at Dec 2025

Total active members 230 As at Dec 2025

Filter by Select Search your member with NI number, TRN...

Full Name	TRN	NI Number	Date of Birth	Status
Mark MacCoy	5243612	AA162413W	12/12/2000	Active
Claire Parker	8463714	AA3745243Q	01/02/1990	Opt out
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John Smith	6241324	AA152416Q	12/06/1992	Active
Walketr Brown	1624312	AA512312Q	08/10/1991	Active
John Brown	1924132	AA734251Q	16/01/1970	Active
Walketr Smith	1524152	AA4925126E	19/07/1980	Active
Robert Brown	1624172	AA162419B	12/12/1989	Active
Robert Parker	1523142	AA126142Q	01/12/1975	Active
Robert Parker	1523142	AA126142Q	01/12/1975	Active

Showing 1 to 10 of 120 items

Jump to: 01 Items per page: 10

Service print - option 1

Select 'Search Member'.

Complete the table to see your search results.
You can then click on 'View service record'.

Teachers' Pensions | For Employers

Dashboard Member Monthly Submission Payroll Support

Manage Member Search Member Transaction History

Manage member

View and manage your member's details.

Establishment Name
Livingstone primary school 009/1234 View Establishment Profile

Total members
6,350
As at Dec 2025

Total opt-outs
3
As at Dec 2025

Total active members
230
As at Dec 2025

Filter by Select Search your member with NI number, TRN...

Full Name	TRN	NI Number	Date of Birth	Status
Mark MacCoy	5243612	AA162413W	12/12/2000	Active
Claire Parker	8463714	AA3745243Q	01/02/1990	Opt out
Robert Zane	7352312	AA1724132Q	11/04/1999	Opt out
John Smith	6241324	AA152416Q	12/06/1992	Active
Walketr Brown	1624312	AA512312Q	08/10/1991	Active
John Brown	1924132	AA734251Q	16/01/1970	Active
Walketr Smith	1524152	AA925126E	19/07/1980	Active
Robert Brown	1624172	AA162419B	12/12/1989	Active
Robert Parker	1523142	AA126142Q	01/12/1975	Active
Robert Parker	1523142	AA126142Q	01/12/1975	Active

Showing 1 to 10 of 120 items

Jump to: 01 Items per page: 10 < 1 2 ... 10 >

Teachers' Pensions | For Employers

Dashboard Member Monthly Submission Payroll Support

Manage Member Search Member Transaction History

Search member

Search for a member in the Teachers' Pension Scheme.

Last Name *
Enter last name

Date of Birth *
dd/mm/yyyy

Gender *
Select

National Insurance Number *
Enter national insurance number

Back Search

Search details

Full Name	TRN	NI Number	Date of Birth	Status
Mark MacCoy	5243612	AA162413W	12/12/2000	Active

View service record

Service print - option 2

Teachers' Pensions For Employers

Dashboard Member Monthly Submission Payroll Support

Manage Member Search Member Transaction History

Manage member

View and manage your member's details.

Establishment Name
Livingstone primary school 009/1234 View Establishment Profile

Total members 6,350 As at Dec 2025

Total opt-outs 3 As at Dec 2025

Total active members 230 As at Dec 2025

Filter by Select search your member with NI number, TRN...

Full Name	TRN	NI Number	Date of Birth	Status
Mark MacCoy	5243612	AA162413W	12/12/2000	Active
Claire Parker	8463714	AA3745243Q	01/02/1990	Opt out
Robert Zane	7352312	AA1724132Q	11/04/1999	Opt out
John Smith	6241324	AA152416Q	12/06/1992	Active
Walketr Brown	1624312	AA512312Q	08/10/1991	Active
John Brown	1924132	AA734251Q	16/01/1970	Active
Walketr Smith	1524152	AA4925126E	19/07/1980	Active
Robert Brown	1624172	AA162419B	12/12/1989	Active
Robert Parker	1523142	AA126142Q	01/12/1975	Active
Robert Parker	1523142	AA126142Q	01/12/1975	Active

Showing 1 to 10 of 120 items

Jump to: 01 Items per page: 10

Edit member details
View salary history
View service record
Opt-in request
Opt-out request
Flexibilities request
Ill health request

- On the 'Manage Member' page make sure you are in the right establishment.
- Submit search in the box.
- Then click on 'View service record'.
- View on screen or download option is available.

Service print

Download statement

Personal details

Title Mr	First Name John	Last Name Smith
Teacher Reference Number 5246172	National Insurance Number AA123456Q	Date of Birth 12/02/1994

If any of the above details are missing or incorrect, please direct the teacher to My Pension Online to update.

Scheme membership and normal retirement dates

Arrangement	First Day of Service	Last Day of Service	Normal Retirement Date	Normal Retirement Age
80th Final Salary	06/02/1999	06/02/2039	06/02/2039	60
60th Final Salary	06/04/1999	06/02/2040	06/02/2040	65
Career Average	06/04/1999	06/02/2047	06/02/2047	68

Final salary – average salary

Average Salary	Method	Average Salary Period Start Date	Average Salary Period End Date
£48,879.91	Method B (Revalued Salary)	06/02/2039	06/02/2039

Member journey

This section will review how to change a members:

- name
- National Insurance number
- gender
- home address
- email address.

It will also show how to raise a death notification.

Changing member details

To change a member's details, you need to be in 'Member', 'Manage Member'. Then:

- search for the relevant member
- click the three dots next to the required record
- click 'Edit member details'.

The screenshot shows the 'Manage member' page in the Teachers' Pensions For Employers system. The page includes a navigation bar with 'Dashboard', 'Member', 'Monthly Submission', 'Payroll', and 'Support'. Below the navigation bar, there are tabs for 'Manage Member', 'Search Member', and 'Transaction History'. The 'Manage member' section displays summary statistics for 'Total members' (6,550), 'Total opt-outs' (3), and 'Total active members' (230). A table lists members with columns for Full Name, TRN, NI Number, Date of Birth, and Status. A dropdown menu is open next to the first member, Mark MacCoy, showing options like 'Edit member details', 'View salary history', and 'View service record'. A red arrow points from the 'Edit member details' option in the dropdown menu to the 'Manage member' title. Another red circle highlights the 'Edit member details' option in the dropdown menu.

Teachers' Pensions For Employers

Dashboard Member Monthly Submission Payroll Support

Manage Member Search Member Transaction History

Manage member

View and manage your member's details.

Establishment Name
Livingstone primary school 009/1234 [View Establishment Profile](#)

Total members 6,550 As at Dec 2025

Total opt-outs 3 As at Dec 2025

Total active members 230 As at Dec 2025

Filter by Select Search your member with NI number, TRN...

Full Name	TRN	NI Number	Date of Birth	Status
Mark MacCoy	5243612	AA162413W	12/12/2000	Active
Claire Parker	8463714	AA3745243Q	01/02/1990	Opt out
Robert Zane	7352312	AA1724132Q	11/04/1999	Opt out
John Smith	6241324	AA152416Q	12/06/1992	Active
Walketr Brown	1624312	AA512312Q	08/10/1991	Active
John Brown	1924132	AA734251Q	16/01/1970	Active
Walketr Smith	1524152	AA4925126E	19/07/1980	Active
Robert Brown	1624172	AA162419B	12/12/1989	Active
Robert Parker	1523142	AA126142Q	01/12/1975	Active
Robert Parker	1523142	AA126142Q	01/12/1975	Active

Showing 1 to 10 of 120 items

Jump to: 01 Items per page: 10

Changing member details

Teachers' Pensions | For Employers

Return to dashboard

mm Mark MacCoy

< Back

Personal details

Edit 

Title	First Name	Last Name	Date of Birth
Mr	Mark	MacCoy	12/12/1990
Gender	Marital Status	National Insurance Number	
Male	Married	AA123456C	

Contact details

Edit 

Address (UK)	Contact Number (Mobile)	Email Address (Personal/Registered)	Member Notification Preference
11b Lingfield Point, Darlington DL1 1AX, United Kingdom.	+44 745 606 6166	mark@gmail.com	☒ Email
Address (Overseas) Active	Contact Number (Home)	Email Address (Work)	
11 St., Brooklyn Bridge, Brooklyn 11201, USA.	+44 132 506 6166	mark@oxfordedu.com	
	Contact Preference	Email Contact Preference	
	☒ Mobile	☒ Personal/Registered mail	

Should you become aware of a teacher's passing, you can raise the death notification by clicking 'Raise death notification'.

Raise death notification

Back

You can edit member details on this page.
Note that not all member details can be edited by the Employer, and for some changes you will need to submit supporting evidence:

- name
- National Insurance number
- gender

Changing member details - name

Full Name
Mr. Mark MacCoy

i To update this information you will need member's deed poll, marriage certificate or civil partnership certificate.

Title

Mr

First Name *

Mark

Last Name *

Anderson

☒ I have reviewed and verified the member's evidence documents.

Back

Continue

Mr. Mark MacCoy

i To update this information you will need member's deed poll, marriage certificate or civil partnership certificate.

Full name change

Review and confirm your details are correct.

From: Mr. Mark MacCoy

To: Mr. Mark Anderson

Cancel

Confirm

Anderson

If you wish to change the member's name/title, you'll need to complete the fields and confirm that you have reviewed and verified their evidence documents.

Changing member details - NI number

Select changes

Update details

National Insurance Number

12345AVCX

To update this information you will need member's notification from HMRC or notification from DWP.

National Insurance Number *

AA123456C

☒ I have reviewed and verified the member's evidence documents.

Back

Continue

Select changes

Update details

National Insurance Number

12345AVCX

NI number change

Review and confirm your details are correct.

From: AA123456C

To: BB123456S

Cancel

Confirm

Back

Continue

If you wish to change the member's National Insurance number, you'll need to update the field and confirm that you have reviewed and verified their evidence documents.

Changing member details - gender

✔ Select changes

● Update details

● Gender
Male

❗ To update this information you'll need member's birth certificate, gender transition certificate or gender recognition certificate. Changing a gender can have far reaching effect as some older factors are not gender equal.

Gender *

Female

Type of Document * ⓘ

Select

Upload

❗ Select the appropriate category when uploading documents. Ensure that scanned documents are clear and legible.

☐ I have reviewed and verified the member's evidence documents.

● Gender
Male

❗ To update this information you'll need member's birth certificate, gender transition certificate or gender recognition certificate. Changing a gender can have far reaching effect as some older factors are not gender equal.

Gender *

Female

Type of Document * ⓘ

Select

Upload

Gender recognition certificate

Birth certificate

ts. Ensure that scanned

☐ I have reviewed and verified the member's evidence documents.

Back

Continue

If you wish to change the member's gender, you'll need to select the appropriate field and upload the relevant documents, as well as ticking the confirmation box.

Changing member details - Address

Contact details

Manage and update contact details.

Select changes

Update details

Edit contact details

Choose one of the options to edit details.

☐ Address (UK) **Active**
11b Lingfield Point, Darlington, DL1 1AX, United Kingdom.

☐ Address (Overseas)
11 St, Brooklyn Bridge, Brooklyn, 11201, USA.

☐ Email Address (Work)
mark@oxfordedu.com

You cannot edit the following categories:

Preferred Method of Communication ☒ Secure message	Member Notification Preference ☒ Email
Contact Number (Home) +44 132 506 6166	Contact Number (Mobile) +44 745 606 6166
Contact Preference ☒ Mobile	Email Address (Personal/Registered) mark@gmail.com
Email Contact Preference ☒ Personal / Registered mail	

Back

Continue

Select changes

Update details

Update address details

☒ Address (UK) **Active**
11b Lingfield Point, Darlington, DL1 1AX, United Kingdom.

Country *
United Kingdom

Postcode
Search address with postcode...

Search

[Enter address manually](#)

☒ Make this member's default address.

☐ I have reviewed and verified the member's evidence documents.

Back

Continue

If you wish to change the member's address, click 'Edit' on the 'Contact details' section. Then select for either a UK or overseas address. If changing a UK address, you can either use the postcode search or you can enter the address manually.

Changing member details - Address

Select changes Update details

Update address details

Address (UK) Active

Country *
United Kingdom

Postcode
BD54 2PH Search

Enter address manually

Address Line 1 *
961 Albert Road

Address Line 2

Town or City
BRADFORD

County

Postcode *
BD54 2PH

☒ Make this your default postal address.
☒ I have reviewed and verified the member's evidence documents.

Back Continue

961 Albert Road

Address Line 2

Town or City
BRADFORD

County

Postcode
BD54 2PH

Address details change

Review and confirm your details are correct.

From:

To: 961 Albert Road, BRADFORD, BD54 2PH, UK

Cancel Confirm

☒ I have reviewed and verified the member's evidence documents.

Back Continue

You then need to review the changes and tick the declaration, before confirming.

Changing member details - email address

Update email address

 Email Address (Work)
mark@oxfordedu.com

Email Address (Work) *

mark1923@oxfordedu.com

Back

Continue

Email address change



Review and confirm your details are correct.

From: mark@oxfordedu.com

To: mark1923@oxfordedu.com

Cancel

Confirm

To update the member's work email address simply add in the new email address and confirm.

To notify a death

From the 'Manage member' tab:

- search for the relevant member
- click the three dots on the right-hand side and click 'Edit member details'
- click 'Raise death notification'.

The process is slightly different depending on if the member was in your employment or had left within the last 12 months, compared to if they left more than 12 months previous.

Teachers' Pensions For Employers

Dashboard Member Monthly Submission Payroll Support

Manage Member Search Member Transaction History

Manage member

View and manage your member's details.

Establishment Name: Livingstone primary school 009/1234 View Establishment Profile

Total members: 6,350 As at Dec 2025

Total opt-outs: 3 As at Dec 2025

Total active members: 230 As at Dec 2025

Filter by: Select Search your member with NI number, TRN...

First Name	TID	NI Number	Date of Birth	Status	
Mark MacCoy	5243612	AA162413W	12/12/1990	Active	
Claire Parker	8463714	AA3745243Q	01/02/1990	Opt out	Edit member details View salary history View service record Opt-in request Opt-out request
Robert Zane	7352312	AA1724132Q	11/04/1999	Opt out	
John Smith	6241324	AA152416Q	12/06/1992	Active	
Walter Brown	1624312	AA512313Q	08/10/1991	Active	

Personal details

Edit

Title Mr	First Name Mark	Last Name MacCoy	Date of Birth 12/12/1990
Gender Male	Marital Status Married	National Insurance Number AA123456C	

Contact details

Edit

Address (UK) 11b Lingfield Point, Darlington DL1 1AX, United Kingdom.	Contact Number (Mobile) +44 745 606 6166	Email Address (Personal/Registered) mark@gmail.com	Member Notification Preference ☒ Email
Address (Overseas) Active 11 St, Brooklyn Bridge, Brooklyn 11201, USA.	Contact Number (Home) +44 132 506 6166	Email Address (Work) mark@oxfordedu.com	
	Contact Preference ☒ Mobile	Email Contact Preference ☒ Personal/Registered mail	

Should you become aware of a member's passing, you can raise the death notification by clicking 'Raise death notification'.

Raise death notification

Back

Death notification – In employment or under 12 months of leaving

Notification of death

We understand this may be a difficult time and we're here to support you in making the process as straightforward and stress-free as possible.

Personal details of deceased member

Title Mr	First Name Mark	Last Name MacCoy	National Insurance Number AA123456C
Teacher Reference Number 6453625	Date of Birth 12/12/1990	Marital Status Married	Date of Marriage 12/02/2016

Contact details of deceased member

Address 11b Lingfield Point, Darlington DL1 1AX, United Kingdom.	Email Address mark@gmail.com	Contact Number (Mobile) +44 745 606 6166	Contact Number (Home) +44 132 506 6166
--	---------------------------------	---	---

Additional details of deceased member

Date of death *

dd/mm/yyyy

Was the member in pensionable service up to the date of their death? *

☐ Yes ☐ No

Was the member on sick leave when they passed away? *

☐ Yes ☐ No

Additional details of deceased member

Date of death *

dd/mm/yyyy

Was the member in pensionable service up to the date of their death? *

☒ Yes ☐ No

Last day of actual pensionable service *

dd/mm/yyyy

Was the member on sick leave when they passed away? *

☒ Yes ☐ No

i Provide medical evidence (sick note) to confirm the date the member first went on sick leave and the reason for sickness in this employment. Absences during the last three years of pensionable service - If none, enter NONE. State the date the absence started, the date returned to work and the proportion of salary received (full/half/SSP/nil).

Absences on Sick Leave

(Ex. 01/03/2025, 15/03/2025 and full)

Other Absences ⓘ

(Ex. 01/03/2025, 15/03/2025 and full)

Had the member left employment due to ill-health? *

☐ Yes ☐ No

Note the question 'Was the member was on sick leave before they passed away?'

If 'Yes', you are presented this screen.

Death notification – In employment or under 12 months of leaving

Employment details

Employment Reference	Employment Type	Employer	Enrolment Type	Joining Date
15246721	Full-time	Abbey School	Auto-enrolment	12/12/2000
84621423	Part-time	Sara School	Contractually enrolled	12/12/2000

Service and salary information

① Update service and salary information by clicking 'Edit'.

Edit 

	Employment Reference	Full-time/Part-time Indicator	Local Authority Number	Establishment Number	Start Date	End Date	Full-time Annual Salary (£)
☐	33515241	Full-time	123	009	01/02/2024	01/01/2024	£20,062.00
☐	11515241	Full-time	123	009	01/01/2024	01/02/2024	£20,062.00
☐	32515241	Full-time	123	009	01/12/2023	01/01/2024	£20,062.00

Back

Continue

This is then followed by service and salary details.
You can update this using the 'Edit' button.

Death notification - over 12 months of leaving employment

Notification of death

We understand this may be a difficult time and we're here to support you in making the process as straightforward and stress-free as possible.

In this instance you'll just need to let us know the date of the member's death. No further information is required about the deceased member.

Personal details of deceased member

Title <i>Mr</i>	First Name <i>Mark</i>	Last Name <i>MacCoy</i>	National Insurance Number <i>AA123456C</i>
Teacher Reference Number <i>6453625</i>	Date of Birth <i>12/12/1990</i>	Marital Status <i>Married</i>	Date of Marriage <i>12/02/2016</i>

Contact details of deceased member

Address <i>11b Lingfield Point, Darlington DL1 1AX, United Kingdom.</i>	Email Address <i>mark@gmail.com</i>	Contact Number (Mobile) <i>+44 745 606 6166</i>	Contact Number (Home) <i>+44 132 506 6166</i>
--	--	--	--

Additional details of deceased member

Date of death *

dd/mm/yyyy



Back

Continue

Death notification

You'll then need to provide the information about the informant. This is either yourself (employer) or the person who has informed you about the member's death.

☒ Deceased member details

☒ Informant details

☐ Declaration

Informant details

If the informant is an employer then provide their details.

Please provide details of the informant.

Title

Select

First Name *

Lucy

Last Name *

MacCoy

Relationship to the Member *

Select

Address details

Country *

United Kingdom

Postcode

DL1 1AX

Search

[Enter address manually](#)

Address Line 1 *

Address Line 2

Town or City

Darlington

County

Postcode *

DL1 1AX

Mobile Number

+44 345 606 6166

Email Address

lucy.maccoy@gmail.com

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Continue

Death notification

Finally, you'll need to complete the declaration.

Notification of death

We understand this is a difficult time and we want to support you in making this process as straightforward as possible.

☒ Deceased member details

☒ Informant details

☒ Declaration

Declaration

Name of Authorised Officer

John Smith

Position

Primary Contact

Contact Number (Mobile)

+44 74826 02342

Email Address

john.smith@cambridge.edu

☒ I hereby confirm that the details provided are true to my knowledge and belief.

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Submit

Member requests

There are three ways for a member's application to be submitted:

- Member to apply online
- Member to complete paper form and send it to us
- Member to complete paper form and hand it to you to initiate, for:
 - Ill-health Retirement application
 - Opting in application
 - Opting out application
 - Flexibilities application

Initiating requests on behalf of a member

Teachers' Pensions For Employers

Dashboard **Member** Monthly Submission Payroll Support

Secure Mail Profile

Manage Member Search Member Transaction History

Manage member

View and manage your member's details.

Establishment Name
Livingstone primary school 009/1234 [View Establishment Profile](#)

Total members

 **6,350**
As at Dec 2025

Total opt-outs

 **3**
As at Dec 2025

Total active members

 **230**
As at Dec 2025

Filter by Select

Full Name	TRN	NI Number	Date of Birth	Status	
Mark MacCoy	5243612	AA162413W	12/12/2000	Active	
Claire Parker	8463714	AA3745243Q	01/02/1990	Opt out	
Robert Zane	7352312	AA1724132Q	11/04/1999	Opt out	
John Smith	6241324	AA152416Q	12/06/1992	Active	
Walketr Brown	1624312	AA512312Q	08/10/1991	Active	
John Brown	1924132	AA734251Q	16/01/1970	Active	
Walketr Smith	1524152	AA4925126E	19/07/1980	Active	

- Edit member details
- View salary history
- View service record
- Opt-in request
- Opt-out request
- Ill-health request

Find your member and click on the request you would like to complete.

Part A

Ill-health retirement request

Members considering early retirement due to ill-health can explore the benefits available when stopping work.

How it works

You can start the ill-health retirement request for the member but it is essential that you discuss this decision with the member before starting the request. Ensure that the member is aware of the following benefits before they consider opting out of the Teachers' Pension Scheme:

1. The earliest that retirement benefits can be paid is at age 55 unless ill-health benefits are granted. From 6 April 2028 the minimum pension age will increase to 57.
2. If during a teacher's career one of the teachers becomes ill and is unable to work, you can apply for ill-health retirement on their behalf. This allows your member to access their pension benefits before their Normal Pension Age (NPA) without the usual reduction applied to an early retirement pension. The member will need to have qualified for benefits to be able to qualify for ill-health retirement.
3. If the member is considering applying for ill-health retirement, then they will need to speak with you to arrange for occupational health support, so that you may be able to find a way to help them remain in or return to work. This could involve reducing their hours or responsibilities.
4. If after speaking with your member they still wish to apply for ill-health retirement you can initiate the request.
5. There is a lot to consider when dealing with this type of retirement and the member needs to ensure they are making the best decision for themselves and their family.

To be eligible:

1. The member must be under the Normal Pension Age of 55 years.
2. The member must be unable to work due to ill-health.
3. The member must have a medical certificate from a practitioner.

Here are the steps:

As an employer, upon receiving the member's paper form request you will:

1. Start the ill-health retirement request process.
2. Review the personal, contact and additional information.
3. Provide the medical information details.
4. Provide the employment details options.
5. Review, declare and submit your request.

What you will need to start this request:

1. The completed member's paper form.
2. The completed medical form from the Medical Advisory.

☐ The member has acknowledged through the Member Form that they have read and understood the instructions regarding the ill-health retirement request.

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Get started

The first page every requests will explain the application process, eligibility criteria, steps and critically what you need to start the request.

Part A

Next is the 'Personal details' page.

If any of the information is incorrect you can either change it on the member profile, or if it isn't editable, you'll need the member to update it and then start the process.

Personal details

Illness details

Medical report details

Personal details

Title <i>Mr</i>	First Name John	Last Name Smith
Teacher Reference Number 6453625	National Insurance Number AA123456Q	Date of Birth 12/02/1970

Contact and additional details

Address 11b Lingfield Point, Darlington DL1 1AX, United Kingdom.	Email Address john.smith@gmail.com	Contact Number (Mobile) +44 345 606 6166
Contact Number (Home) +44 345 606 6166	Normal Pension Age (NPA) 60	

1

If any personal or contact details are incorrect, update them in the 'Member profile'. Only certain information is editable, so if you can't update something, ask the member to do this and then restart the request.

Member profile

Scan and upload a copy of Part A of the paper request form submitted by the member. • 1

Select file

Upload

☐ I have reviewed the member's ill-health retirement request form and I am submitting it on their behalf.

Back

Continue

Part A

You will be promoted to upload a copy of the paper Part A, completed by the member.

Personal details

Illness details

Medical report details

Personal details

Title Mr	First Name John	Last Name Smith
Teacher Reference Number 6453625	National Insurance Number AA123456Q	Date of Birth 12/02/1970

Contact and additional details

Address 11b Lingfield Point, Darlington DL1 1AX, United Kingdom.	Email Address john.smith@gmail.com	Contact Number (Mobile) +44 345 606 6166
Contact Number (Home) +44 345 606 6166	Normal Pension Age (NPA) 60	

① If any personal or contact details are incorrect, update them in the 'Member profile'. Only certain information is editable, so if you can't update something, ask the member to do this and then restart the request.

Member profile

Scan and upload a copy of Part A of the paper request form submitted by the member. * ①

Select file

Upload

☐ I have reviewed the member's ill-health retirement request form and I am submitting it on their behalf.

Back

Continue

Ill-health Retirement - Part A

Medical Information Form ⓧ

i Ensure that you complete the Medical Information Form before submitting the member's request for ill-health retirement benefits.

A Medical Information Form must be completed by an occupational health doctor familiar with the applicant's condition.

You can download the Medical Information Form below.

 Medical information form

Begin the process

Before you fully start the process, you'll see a box highlighting the need for the Medical Information form and a link to download it if it hasn't been completed.

You'll need this as you're required to upload it later in the process.

Ill-health Retirement - Part A

Illness details

📘 Ensure that all the relevant medical reports from specialist are attached.

Provide the details of member's illness and how it affects their ability to continue teaching or working. *

Where teaching employment has ceased in the last 5 years, were any workplace adjustments, work content or pattern adjustments, increased support or redeployment made before leaving employment? *

☒ Yes ☐ No

Next, you'll go to the 'Illness details'. You'll need to provide more information about the members illness and the impact on the members working pattern/sick leave.

Impact on Working Patterns ⓘ

Did the member experience a reduction in responsibility (salary or hours) due to illness prompting this application? *

☒ Yes ☐ No

Start Date of Reduction	End Date of Reduction	New Salary Amount ⓘ	Change in Hours (Full to Part-time) ⓘ
<input type="text" value="dd/mm/yyyy"/> 📅	<input type="text" value="dd/mm/yyyy"/> 📅	<input type="text" value="-"/>	<input type="text" value="-"/> 🗑️
<div>Add +</div>			

Provide details of sick leave taken in the last three years of teaching. *

From	To	Nature of illness	Illness Related to Application (Yes/No)	Full/Half/No Salary	Calendar Days Absent ⓘ
<input type="text" value="dd/mm/yyyy"/> 📅	<input type="text" value="dd/mm/yyyy"/> 📅	<input type="text" value="-"/>	<div>Select ▼</div>	<div>Select ▼</div>	<input type="text" value="-"/> 🗑️
<div>Add +</div>					

Back

Continue

Ill-health Retirement - Part A

Medical report details

Include details of any medical reports and documents that should be considered alongside the member's application. *

Date of Report	Name of Medical Practitioner	Address of Medical Practitioner	
12/03/2023 	Scott smith	20f Lingfield Point, Darlington DL1 1AX, United Kingdom	
dd/mm/yyyy 	Enter name	Enter address	

Add +

Attach the supporting Medical Information Form from the occupational health physician, general practitioner or medical practitioner. *

Select file

Upload

Back

Continue and apply for ill-health retirement

This will then bring you to the 'Medical reports' section.

You'll need to add the information about the reports, as well as uploading the form and reports, using the upload function.

Ill-health Retirement - Part A

Ill-health retirement details

① As per our records, the member is in pensionable service.

Is the member in eligible employment? *

☐ Yes ☒ No

When did member leave eligible employment?

dd/mm/yyyy



Does the member wish to take a serious ill-health lump sum due to reduced life expectancy? *

☐ Yes ☐ No

① After the serious ill-health lump sum benefit is paid, the decision is irrevocable.

Did the member experience a salary reduction due to ill-health with a previous employer in the Career Average 2015 Scheme?

☐ Yes ☐ No

① Member is stepping down from the Career Average 2015 Scheme due to ill-health.

☒ I have provided the member's information to the best of my knowledge and would like to initiate an ill-health retirement request on their behalf.

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Save

Continue

Next is the 'Ill-health Retirements details' page.

You'll then move on to Part B, which is the employer section.

Opting in (Election to join) - Part A

Opt in

Review your member's opt in request before proceeding.

Personal details

Title Mr	First Name John	Last Name Smith
Teacher Reference Number 5248172	National Insurance Number AA123456Q	Date of Birth 12/02/1994

Contact details

Address 110 Lingfield Point, Dartington DL1 1AX, United Kingdom.	Email Address john.smith@gmail.com	Contact Number (Home) +44 345 606 6166
Contact Number (Mobile) +44 345 606 6166		

Employment details

Employment Reference	Employment Type	Employer Name	Enrolment Type	Joining Date	Opt out Date
☐ 15246721	Full-time	Abbey School	Auto	12/12/2000	12/12/2004
☐ 84621423	Part-time	Abbey School	Contractual	12/12/2000	12/12/2006

☒ If any personal or contact details are incorrect, update them in the 'Member Profile'. Only certain information is editable, so if you can't update something, ask the member to do this and then retest the request.

[Member profile](#)

Scan and upload a copy of Part A of the paper request form submitted by the member. *

Select file [Upload](#)

☒ I confirm that I have reviewed the member's opt in request and am submitting it on their behalf with the member's consent. I accept responsibility for the accuracy of the information provided.

[Back](#) [Continue](#)

In Employment details you'll be able to see the employment contracts the member is currently opted out for.

Please select the one the member wishes to opt back in for (the example shows a member having two contracts).

Opting out - Part A

Opt out

Review your member's opt-out request before proceeding.

Personal details

Title Mr	First Name John	Last Name Smith
Teacher Reference Number 5246172	National Insurance Number AA123456Q	Date of Birth 12/02/1994

Contact details

Address 11b Lingfield Point, Darlington DL1 1AX, United Kingdom.	Email Address john.smith@gmail.com	Contact Number (Mobile) +44 345 606 6166
Contact Number (Home) +44 345 606 6166		

Employment details

Date Received *

Auto-enrolment or Auto-Re-enrolment Date 12/10/2004

Most Recent Contractual Enrolment Date 12/10/2004

Employment	Employment	Employer Name	Enrolment Type	Joining Date	Opt-in Date	Opt-out Reason	
☐	15246721	Part-time	The Starship Children's Centre	Auto	12/12/2000	-	Select
☐	84631423	Full-time	The Starship Children's Centre	Auto	12/12/2005	-	Select

ⓘ If any personal or contact details are incorrect, update them in 'Member Profile'. Only certain information is editable, so if you can't update something, ask the member to do this and then restart the request.

[Member profile](#)

Scan and upload a copy of Part A of the paper request form submitted by the member. * ⓘ

Select file [Upload](#)

☒ I confirm that I have reviewed the member's opt-out request and am submitting it on their behalf with the member's consent. I accept responsibility for the accuracy of the information provided.

[Back](#) [Continue](#)

Date received - this refers to the date you received the paper form from the member.

You'll also need to include the opt out reason (the member will have stated this on their paper copy).

Flexibilities- Part A

Member's flexibilities benefits

Explore different options to buy extra annual pension in addition to main scheme benefits.

Member's flexibilities benefits

✓ Additional Pension

Members can buy extra pension benefits separately from their main pension. The cost will depend on their age and how much extra pension they want. This extra pension will increase with inflation both while members work and after they retire. They can also buy it to cover benefits for themselves and any adult beneficiaries. Before applying online, it's a good idea for members to check the value of their pension using the Additional Pension Estimate tool.

We suggest that you review your pension value using the **Additional Pension** estimate before progressing with the application online.

✓ Faster Accrual

Faster Accrual provides an opportunity to pay higher contributions to increase the amount of pension build up in the scheme year (1 April to 31 March).

We recommend members review their pension value using the **Faster Accrual** estimate before progressing with the application online.

✓ Actuarially Adjusted Benefits (AAB) Buy Out

Members in the career average arrangement have the option to buy out the standard reduction applied to their benefits if they choose to retire before their Normal Pension Age (NPA). This buy-out can cover up to three years of early retirement between ages 65 and 68. However, if a member's NPA is lower than 67, they can only buy out up to two years of the reduction.

Advised the member to review their pension value using the **Actuarially Adjusted Benefits (AAB) Buy Out** estimate before progressing with the application online.

✓ The member has acknowledged through the Member Form that they have read and understood the instructions regarding the flexibility benefits.

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! Actuarially Adjusted Benefits (AAB) Buy Out

Members in the career average arrangement have the option to buy out the standard reduction applied to their benefits if they choose to retire before their Normal Pension Age (NPA). This buy-out can cover up to three years of early retirement between ages 65 and 68. However, if a member's NPA is lower than 67, they can only buy out up to two years of the reduction.

Advised the member to review their pension value using the **Actuarially Adjusted Benefits (AAB) Buy Out** estimate before progressing with the application online.

! You are not eligible for AAB Buy Out.

Buy out flexibilities should be taken within 6 months of joining the scheme. Contact **Employer Support Team**.

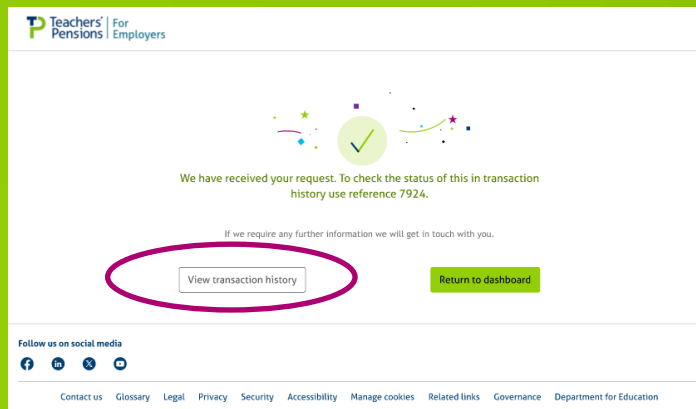
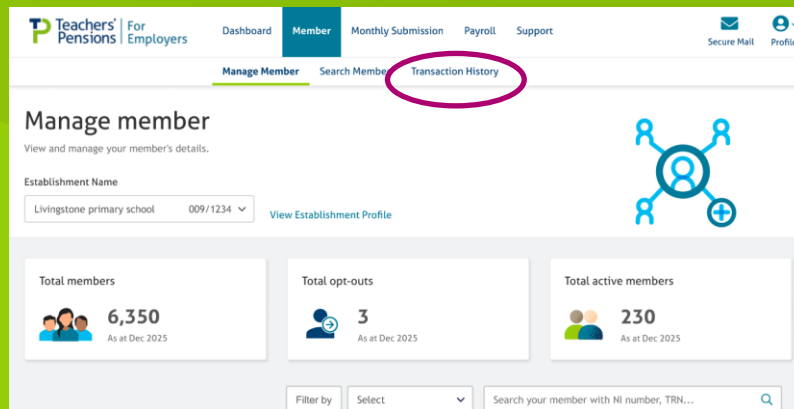
You'll need to state which flexibilities the member wishes to apply for.

If, for any reason the member is not eligible to apply for flexibilities you'll receive an error message.

All - Part B

At the end of each application, you'll go to a confirmation page with a reference number.

You can go to the Transaction History page (either using the button on the page, or on the top navigation) to check previous cases.



All - Part B

Teachers' Pensions For Employers

Dashboard Member Monthly Submission Payroll Support

Manage Member Search Member Transaction History

Transaction history

All types of transaction request are displayed in the following table.

Establishment Name

Livingstone primary school 009/1234 View Establishment Profile

Period 2026 Filter by Select Search by case reference, type...

Case Reference	Submitted By	Submitted On	Type	Status	Case Remarks	
3845	Michael Parker	12/10/2026 16:23	Opt-in request	Submitted		👁
6428	Michael Parker	02/09/2026 16:23	Profile update	Failed	Evidence is incorrect	👁
2934	Michael Parker	04/08/2026 16:23	Profile update	Completed		👁
7462	Michael Parker	01/07/2026 16:23	Opt-out request	Completed		👁
8362	Michael Parker	12/06/2026 16:23	Flexibilities request	Completed		👁
8473	Michael Parker	12/05/2026 16:23	Profile update	Completed		👁
9372	Michael Parker	12/04/2026 16:23	Profile update	Completed		👁
9274	Michael Parker	12/03/2026 16:23	De-enrol	Completed		👁
1024	Michael Parker	12/02/2026 16:23	New	Completed		👁
2863	Michael Parker	12/01/2026 16:23	Profile update	Completed		👁

Showing 1 to 10 of 120 items Jump to: 01 Items per page: 10 < 1 2 ... 10 >

Once in Transaction history, you will be able to see your previous cases.
Clicking on the 'eye' icon will give you more details about the case.

Teachers' Pensions For Employers

Return to dashboard

Summary

We have received your request. Review your case history below.

Case reference history - 902112

Submitted By	Submitted Date	Case Remarks	Status
Michael Parker	02/08/2024 11:36	Opt-in Election request in progress	Submitted
Michael Parker	01/08/2024 13:08	Found error	Error
Michael Parker	01/08/2024 10:39	Opt-in Election request in progress	Submitted
Michael Parker	01/08/2024 09:15	Opt-in Election request created	Case created

Back