



Employer Portal Member tasks

November 2026 v0.3

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](#)

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Member applications

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
 - Ill-health Retirement application
 - Opting in application
 - Opting out application
 - Flexibilities application

Employer Portal dashboard

To get started you'll need to visit:

- Employer Portal > Dashboard> View Establishment Profile
- In the Tasks box you'll be able to see a summary of tasks that you need to complete.
- You can view all the tasks by clicking 'View all' at the bottom of the summary box.
- To start a task, click the eye button on the right side of the box.

The screenshot shows the 'Employer Portal dashboard' for a user named Michael. The page has a teal header with the 'Teachers' Pensions For Employers' logo and navigation links: 'Dashboard' (active), 'Member', 'Monthly Submission', 'Payroll', and 'Support'. On the right, there are links for 'Secure Mail' and 'Profile'. The main content area starts with a 'Welcome, Michael' message and a sub-header 'Here is your dashboard to keep you up to date.' Below this is a section for 'Establishment Name' with a dropdown menu showing 'Livingstone primary school' and '009/1234', and a 'View Establishment Profile' link. To the right of this is a computer monitor icon. The 'Tasks' section is highlighted with a green box. It contains a table with columns: 'TRN', 'Task Reference', 'Task Name', and 'Submitted On'. The table lists six tasks, each with an eye icon on the right. The eye icon for the third task is circled in green. At the bottom right of the tasks box, there is a 'View all' link, also circled in green.

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

Retirement applications

- Age/Early Retirement
- Phased Retirement
- Premature Retirement
- Additional Service After Retirement (ASAR)
- Short Service Annuity (SSA)
- Ill-health Retirement
- Stepping down Election

Normal/Early Retirement - Part A

Review the member's part A. Edit last date of employment if it's incorrect.

Retirement process request
Review your member's retirement request before proceeding.

Personal details		
Title Mr	First Name John	Last Name Smith
Teacher Reference Number 6453625	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) +44 715 606 6166
Contact Number (Home) +44 345 606 6166		

Additional details	
Last Date of Teaching Employment 12/02/2024	Do you want to apply for early retirement? No
☐ If the last date of teaching employment is not correct please update it.	

Payment details		
Where do you want your benefits paid? United Kingdom	Account Holder Name Jack MacCoy	Sort Code ** ** 89
Account Number **** 2443	Bank Account Type Bank Account	Type of Account Savings

[Edit](#)

At the bottom of the page, you'll have two options; to continue or to 'Refer to Teachers' Pensions'.

Withdrawal details	
Normal Pension Age of 60 (NPA 60) Yes Amount per year ⓘ £2,045	
Normal Pension Age of 65 (NPA 65) No, I do not want to give up some of my pension for a lump sum.	
Career average arrangement No, I do not want to give up some of my pension for a lump sum.	
Additional pension elections No, I do not want to give up some of my pension for a lump sum.	

Other details	
Your employment details:	
Employer Name	Address
The Starship Children's Centre	Bar Hill Primary School, Gladeside, Bar Hill, Cambridgeshire, CB23 8DY.
Abbey Lane Children's Centre	Abbey Lane, Stratford, E15 2SD, UK.
Lump Sum Allowance No	
Past Added Years (PAY) I will pay the outstanding contributions before receiving payment of my benefits from the Teachers' Pension Scheme	

[Back](#) [Refer to Teachers' Pensions](#) [Continue](#)

Normal/Early Retirement - Part A

If you think any information the member has submitted is incorrect or the application should be rejected, please use the referral button.

Submitting this will refer the application back to Teachers' Pensions. Please provide a reason for referral/rejection in the free text box.

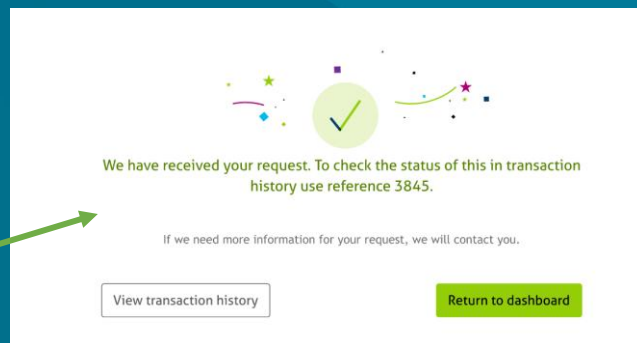
A 65)

Reason for referral or rejection *

Provide the reason for referring or rejecting the member request. Eg. Reason could be if the member data is not correct, etc.

Comment

Back Submit



Click on 'View transaction history' or go to Go to Employer Portal > Member> Transaction History to see the case status.

Teachers' Pensions For Employers

Dashboard Member Monthly Submission Payroll Support

Manage Member Transaction History

Transaction history

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

Case Reference	Submitted By	Submitted On	Type	Status	Case Remarks
3845	Michael Parker	12/10/2023 16:23	Retirement request	Referred to TPS	

Normal/Early Retirement - Part B

Retirement process request
Review your member's retirement request before proceeding.

Member request details | **Employment details** | Declaration

Employment details

Establishment Number
009/7571

Is the teacher currently suspended from duty? *

☐ Yes ☐ No

Update service and salary information by clicking 'Edit'.

Service and Salary Information prior to leaving eligible employment. [Edit](#)

Employment Reference	Full-time/Part-time Indicator	Local Authority Number	Establishment Number	Start Date	End Date	Full-time Annual Salary (£)	Part-Earning
☐ 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	

Projected services and salary information can be specified by using the 'Add' button.

Projected services and salary information

Employment Reference	Role Identifier	Full time/ Part time Indicator	Local Authority Number	Establishment Number	Start Date	End Date	Full-Time Annual Salary
<input type="button" value="Add +"/>							

Establishment Number
009/7571

Is the teacher currently suspended from duty? *

☒ Yes ☐ No

Upload the copy of the suspension letter *

If there are no issues with the member application, you can continue as normal to Part B.

Firstly, you'll need to confirm if the member is currently suspended from duty and if yes, provide evidence via the upload function.

Normal/Early Retirement - Part B

Then review the recent service and salary details.

A general application will show the last 12 months of service (if in employment for that length of time).

If you believe any of the information is incorrect you can update it.

Update service and salary information by clicking 'Edit'.

Service and Salary Information prior to leaving eligible employment.

[Edit](#)

Employment Reference	Full-time/Part-time Indicator	Local Authority Number	Establishment Number	Start Date	End Date	Full-time Annual Salary (£)	Part-time Earnings (£)
☒ 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	

You'll need to scroll along the table to provide all the necessary information. You can see the full table above.

Employment Reference	Full-time/Part-time Indicator	Local Authority Number	Establishment Number	Start Date	End Date	Full-time Annual Salary (£)	Part-time Earnings (£)	Days Out	Additional Pensionable Payments (£)	Overtime Gross Amount (£)	Withdrawal
☒ 33515241	Full-time	123	009	01/02/2024	01/01/2024	£20,062.00	-	58	£2,062.00	£262.00	W
☒ 11515241	Full-time	123	009	01/01/2024	01/02/2024	£20,062.00	-	58	£2,062.00	£262.00	W
☐ 32515241	Full-time	123	009	01/12/2023	01/01/2024	£20,062.00	-	58	£2,062.00	£262.00	W

Normal/Early Retirement - Part B

Once you've made your changes, click save and confirm.

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

Service and Salary Information prior to leaving eligible employment.

Cancel × Save and confirm

Employment Reference	Full-time/Part-time Indicator	Local Authority Number	Establishment Number	Start Date	End Date	Full-time Annual Salary (£)	Part-Earning
☒ 33515241	Full-time	123	009	01/02/2024	01/03/2024	£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	

Service and salary detail changes

Confirm the updated service and salary details are correct.

From: Full-time Annual Salary (£)
£20,062.00

To: Full-time Annual Salary (£)
£22,062.00

Cancel Confirm

If you have made any changes a pop-up box will then appear for you to confirm this. Please click Confirm to continue with the application.

Normal/Early Retirement - Part B

Next is the projected salary information. Please update this to include expected service and salary details from the time of their application to the members expected retirement date

	Employment Reference	Role Identifier	Full time/ Part time Indicator	Local Authority Number	Establishment Number	Start Date	End Date	Full-Time Annual Salary (£)	Part-Time Earnings (£)	Days Out	Additional Pensionable payments (£)	Overtime (Gross Amount (£)	Withdrawal
☐	33515241		Full time ▼	123	009	01/02/2024	01/03/2024	£20,062.00	-	58	£2,062.00	£262.00	W
	Add +												

As with the previous salary table, you'll need to scroll across to view the full table.

Normal/Early Retirement - Part B

Member request details Employment details **Declaration**

Declaration

The certificate must be signed by a responsible officer of the Local Authority, not the school, in respect of all maintained schools including both foundation and voluntary aided schools. In the case of other institutions, the certificate must be signed by a responsible officer or chairperson of the governing body. This cannot be a member of the teaching staff.

Name of Authorised Officer John Smith	Position Primary Contact
Contact Number (Mobile) +44 74826 02342	Email Address john.smith@cambridge.edu

☒ I verify the accuracy of the provided information and have conducted a thorough review of retirement request.

[Back](#) [Submit](#)

Once you've completed the 'Employments Details' section you'll need to read and submit the declaration.



We have received your request. To check the status of this in transaction history use reference 3845.

If we need more information for your request, we will contact you.

[View transaction history](#) [Return to dashboard](#)

The confirmation page provides a reference number for the case. You can also go to your transaction history to check previous cases, or you can return to the main dashboard.

Phased Retirement - Part A

Phased retirement request

Review your member's phased retirement request before proceeding.

Personal details

Title	First Name	Last Name
Mr	John	Smith
Teacher Reference Number	National Insurance Number	Date of Birth
6453625	AA123456Q	12/02/1994

Contact and additional details

Last Date of Higher Paid Post 12/02/2024	Email Address john.smith@gmail.com	Address 11b Lingfield Point, Darlington DL1 1AX, United Kingdom.
Contact Number (Mobile) +44 715 606 6166	Contact Number (Home) +44 345 606 6166	

Payment details

Where do you want your benefits paid? United Kingdom	Account Holder Name Jack MacCoy	Sort Code ** ** 89
Account Number **** 2443	Bank Account Type Bank Account	Type of Account Saving

Phased retirement options

Final salary - Normal Pension Age of 60 (NPA 60)
50%

Final salary - Normal Pension Age of 65 (NPA 65)
45%

Career average benefits
60%

Additional pension benefits
I wish to continue paying contributions towards my additional pension.

Phased Retirement collects a bit more information compared to Age/Early.

Withdrawal details

Final salary - Normal Pension Age of 60 (NPA 60)

Yes

Amount per year ⓘ
£2,045

Final salary - Normal Pension Age of 65 (NPA 65)

No, I do not want to give up some of my pension for a lump sum.

Career average arrangement

No, I do not want to give up some of my pension for a lump sum.

Additional pension elections

No, I do not want to give up some of my pension for a lump sum.

Other details

Your employment details:

Employer Name	Address
The Starship Children's Centre	Bar Hill Primary School, Gladeside, Bar Hill, Cambridgeshire, CB23 8DY..
Abbey Lane Children's Centre	Abbey Lane, Stratford, E15 2SD, UK..

Lump Sum Allowance

No

Past Added Years (PAY)

I will pay the outstanding contributions before receiving payment of my benefits from the Teachers' Pension Scheme..

Back

Refer to Teachers' Pensions

Continue

Phased Retirement - Part B

Teachers' For Employers Pensions

Cancel

Phased retirement request

Review your member's phased retirement request before proceeding.

Member request details

Employment details

Declaration

Employment details

Establishment Number

009/7571

Is the teacher currently suspended from duty? *

Yes

No

Update service and salary information by clicking 'Edit'.

Service and Salary information prior to leaving eligible employment.

Edit

Employment Reference	Full-time/Part-time Indicator	Local Authority Number	Establishment Number	Start Date	End Date	Full-time Annual Salary (£)	Part-Earning	
☐	33515241	Full-time	123	009	01/02/2024	01/03/2024	£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	

Projected services and salary information can be specified by using the 'Add' button.

Projected services and salary information

Employment Reference	Role Identifier	Full time/ Part time Indicator	Local Authority Number	Establishment Number	Start Date	End Date	Full-Time An Salar
<div>Add +</div>							

Last Date of Higher Paid Post

12 / 02 / 2024

New lower paid post

Full/Part-time (F/P)	Start Date	Full-Time Annual Salary (£)	% contracted hours part-time
Full time	12/02/2023	£20,062.00	70%

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This is like the other retirement applications - with the addition of the Phased Retirement information (circled above).

Premature Retirement - Part A

Teachers' Pensions

For Employers

Cancel

Premature retirement request

Review your member's premature retirement request before proceeding.

Personal details

Title	First Name	Last Name
Mr	John	Smith
Teacher Reference Number	National Insurance Number	Date of Birth
6453625	AA123456Q	12/02/1994

Contact and additional details

Last Date of Teaching Employment	Email Address	Address
12/02/2024	john.smith@gmail.com	11b Lingfield Point, Darlington DL1 1AX, United Kingdom.
Contact Number (Mobile)	Contact Number (Home)	
+44 715 606 6166	+44 345 606 6166	

Payment details

Where do you want your benefits paid?	Account Holder Name	Sort Code
United Kingdom	Jack MacCoy	** ** 89
Account Number	Bank Account Type	Type of Account
**** 2443	Bank Account	Saving

Withdrawal details

Final salary – Normal Pension Age of 60 (NPA 60)

Yes

Amount per Year ⓘ

£2,045

Final salary – Normal Pension Age of 65 (NPA 65)

No, I do not want to give up some of my pension for a lump sum.

Career Average Arrangement

No, I do not want to give up some of my pension for a lump sum.

Additional Pension Elections

No, I do not want to give up some of my pension for a lump sum.

Other details

Your employment details:

Employer Name	Address
The Starship Children's Centre	Bar Hill Primary School, Gladeside, Bar Hill, Cambridgeshire, CB23 8DY.
Abbey Lane Children's Centre	Abbey Lane, Stratford, E15 2SD, UK.

Lump Sum Allowance

No

Past Added Years (PAY)

Pay the outstanding contributions by means of a cheque payment prior to receiving payment of your benefits from the Teachers' Pension Scheme

Back

Refer to Teachers' Pensions

Continue

Premature Retirement - Part B

Firstly, you'll be asked to confirm that the application has been discussed with the member.

Have you discussed this Premature Retirement decision with your member? 

If you haven't already discussed the premature retirement request with your member, we recommend you do so before proceeding.

Cancel

Yes, proceed further

Premature Retirement - Part B

You'll be asked about the compensation arrangements.

If a member has more than one employer a decision will need to be made as to who is the 'primary employer' and responsible for the compensation payments.

Administering employers compensation

If you do decide to grant a member premature retirement benefits you need to be aware that you will be legally obliged to pay Mandatory Compensation for the lifetime of that member.

If the member has more than one employer and the second employer has not agreed to make the member redundant, then you will cover the Mandatory Compensation for all of the member's service to their Normal Pension Age, including service with the other employers.

This is assuming the member leaves pensionable service in their other employment, either by leaving that post or opting out of their second employment. Please note that if the member is in a fixed term contract, then they are not eligible for premature retirement.

We request you to refer our webpages to find out more about [Premature retirement](#).

Would you like Teachers' Pensions to administer the employer's compensation?

☒ The institutions and employers in the Independent Sector cannot grant discretionary enhancement.

☐ Yes ☐ No

Back

Continue

Would you like Teachers' Pensions to administer the employer's compensation? *

☒ The institutions and employers in the Independent Sector cannot grant discretionary enhancement.

☒ Yes ☐ No

☐ Mandatory Compensation ☒ Discretionary Compensation

Do you wish Teachers' Pensions to pay the lump sum? * ☐

☒ Yes ☐ No

Have you entered into a contract in the past with Teachers' Pensions to administer? *

☒ Yes ☐ No

Number of added years granted in respect of discretionary premature retirement compensation *

☒ Years ☐ None ☐ Not known

Years

Days

Enter years

Enter days

☐ If over 6 years 243 days, please state the amount of redundancy or termination payments to be made, if any:

Amount per year

£ Enter the amount per year

Method of reimbursement of the employers share of the award *

☐ Pay as you go
☐ Actuarial lump sum
☒ Actuarial lump sum over 2 to 5 years

Number of years you will pay over *

Enter number of years you will pay over

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Continue

ASAR - Part A

Part A shows what the member has completed. You can either refer to Teachers' Pensions or continue to Part B.

Additional service after retirement request

Review your member's additional service after retirement request before proceeding.

Personal details

Title	First Name	Last Name
Mr	John	Smith
Teacher Reference Number	National Insurance Number	Date of Birth
6453625	AA123456Q	12/02/1994

Contact details

Address	Email Address	Contact Number (Mobile)
11b Lingfield Point, Darlington DL1 1AX, United Kingdom.	john.smith@gmail.com	+44 715 606 6166
Contact Number (Home)		
+44 345 606 6166		

Additional details

Last Date of Teaching Employment
12/02/2023

Payment details

Where do you want your benefits paid?	Bank Account Type
United Kingdom	Bank Account
Account Number	Sort Code
**** 2443	** ** g9
Account Holder Name	Bank Address
Jack MacCoy	HSBC Plc, 11b Lingfield Point, Darlington, DL1 1AX, United Kingdom.

Withdrawal details

Normal Pension Age of 60 (NPA 60)

Yes

Amount per year ⓘ
£2,045

Normal Pension Age of 65 (NPA 65)

No, I do not want to give up some of my pension for a lump sum.

Career average arrangement

No, I do not want to give up some of my pension for a lump sum.

Additional pension elections

No, I do not want to give up some of my pension for a lump sum.

Other details

Your employment details:

Employer Name	Address
The Starship Children's Centre	Bar Hill Primary School, Gladeside, Bar Hill, Cambridgeshire, CB23 8DY.
Abbey Lane Children's Centre	Abbey Lane, Stratford, E15 2SD, UK.

Lump Sum Allowance

No

Past Added Years (PAY)

I will pay the outstanding contributions before receiving payment of my benefits from the Teachers' Pension Scheme.

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Refer to Teachers' Pensions

Continue

ASAR - Part B

As part of the ASAR application, you'll be asked about Premature Retirement.

If the member is applying for this type of retirement, you'll be taken to the compensation pages (shown in the Premature Retirement screens).

Is the member applying for premature retirement? ⓘ

☐ Yes ☐ No

Close

Continue

Administering employers compensation

If you do decide to grant a member premature retirement benefits you need to be aware that you will be legally obliged to pay Mandatory Compensation for the lifetime of that member.

If the member has more than one employer and the second employer has not agreed to make the member redundant, then you will cover the Mandatory Compensation for all of the member's service to their Normal Pension Age, including service with the other employers.

This is assuming the member leaves pensionable service in their other employment, either by leaving that post or opting out of their second employment. Please note that if the member is in a fixed term contract, then they are not eligible for premature retirement.

We request you to refer our webpages to find out more about [Premature retirement](#).

Would you like Teachers' Pensions to administer the employer's compensation?

ⓘ The institutions and employers in the Independent Sector cannot grant discretionary enhancement.

☐ Yes ☐ No

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Continue

Short Service Annuity - Part A

Part A shows the member selections - as it is a SSA some of the questions the member answered will be slightly different. However, this is just for your reference.

Short-service annuity request

Review your member's short-service annuity request before proceeding.

Personal details

Title Mr	First Name John	Last Name Smith
Teacher Reference Number 6453625	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) +44 715 606 6166
Contact Number (Home) +44 345 606 6166		

Payment details

Where do you want your benefits paid? United Kingdom	Bank Account Type Bank Account
Account Number **** 2443	Sort Code ** ** 99
Account Holder Name Jack MacCoy	Bank Address HSBC Plc, 11b Lingfield Point, Darlington, DL1 1AX, United Kingdom.

Other details

Lump Sum Allowance
Yes

Lump Sum Allowance Calculation (LSA) - (A)

Scheme name	Annual pension at relevant date (£)
Personal pension plan	£600.77
Self invested personal pension plan	£700.09
Group pension plan	£800.27
Total pension in payment	£2,102.31
LSA% (A)	32.01%

Lump Sum Allowance Calculation (LSA) - (B)

Scheme name	Date	LSA (%)	PCLS (£)
Personal pension plan	12/03/2016	12.98%	£200.02
Self invested personal pension plan	02/03/2017	23.63%	£300.77
Group pension plan	08/01/2018	10.12%	£600.05
Total LSA amounts since 6 April 2006 (B)			46.78%

Lump Sum Allowance Calculation (LSA) - (C)

Scheme name	Date	LSA (%)	PCLS (£)
Personal pension plan	12/03/2017	12.98%	£200.02
Self invested personal pension plan	12/03/2017	23.63%	£300.77
Group pension plan	12/03/2017	10.12%	£600.05
Total LSA amounts due on the same day as payment % (C)			46.78%

Transitional Protection Certificate

Have you applied to His Majesty's Revenue & Customs (HMRC) for a Primary, Enhanced, Individual or Fixed Protection Certificate?

Yes

Document

Document.pdf

View

If applicable, please advise if the Enhanced or Fixed Protection Certificate is still current and in force

Yes

Standard lifetime allowance

Divorce pension credit
Overseas service

Back

Refer to Teachers' Pensions

Continue

Short Service Annuity - Part B

Again, you'll then need to complete the Employment details and Declaration pages.

● Employment details

○ Declaration

Employment details

Establishment Number
009/7571

Is the teacher currently suspended from duty? *

☐ Yes ☐ No

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

Service and Salary Information prior to leaving eligible employment. Cancel ✕ Save and confirm ✓

Employment Reference	Full-time/Part-time Indicator	Local Authority Number	Establishment Number	Start Date	End Date	Full-time Annual Salary (£)	Part-time Earnings
☒ 33515241	Full-time ▾	123	009	01/02/2024	01/03/2024	£22,062.00	
☐ 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	

● Employment details

● Declaration

Declaration

I certify that the service and salary details provided is a true and accurate record of payments made in respect of pensionable service. I certify that teaching employment or pensionable service as appropriate, will cease or has ceased on the date provided. I appreciate that, for final salary or early retirement benefits, the absence of a break in teaching employment of at least one day will invalidate this application. I appreciate that, for career average benefits taken on or after NPA, the absence of a break in pensionable service will invalidate this application.

Name of Authorised Officer John Smith	Position Primary Contact
Contact Number (Mobile) +44 74826 02342	Email Address john.smith@cambridge.edu

☒ I verify the accuracy of the provided information and have conducted a thorough review of retirement request.

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Submit

Ill-health Retirement - Part A

You will start by seeing Part A. It includes slightly different questions to other Part A's so please take the time to look over it to ensure the member information is correct.

Ill-health retirement request
Review your member's ill-health retirement request before proceeding.

Personal details

Title	First Name	Last Name
Mr	John	Smith
Teacher Reference Number	National Insurance Number	Date of Birth
6453625	AA123456Q	12/02/1994

Contact details

Address	Email Address	Contact Number (Mobile)
11b Lingfield Point, Darlington DL1 1AX, United Kingdom.	john.smith@gmail.com	+44 743 606 6166
Contact Number (Home)		
+44 345 606 6166		

Additional details

i As per our records, you are in pensionable service.

Are you currently in eligible employment?

☒ No

Date of leaving eligible employment

12/02/2023

Do you wish to take a serious ill-health lump sum due to reduced life expectancy?

☒ No

i Any decision to take a serious ill-health lump sum is irrevocable once the benefit is paid.

Stepping Down Election

Career Average 2015 Scheme (Current employer)

☒ No

Career Average 2015 Scheme (Previous employer)

☒ No

i You have made a stepping down election on account of ill-health as a member of the Career Average 2015 Scheme.

Employment details

Have you been employed outside of teaching?

☒ No

i Our records show that this teacher was previously barred from duty or was the subject of an investigation.

Are you suspended from duty or is an investigation pending for any reason?

☒ No

Have you had any contact with DfE, the Disclosure and Barring Service or the Teaching Regulation Agency regarding any suspension or investigation?

☒ No

Ill-health Retirement - Part B

You'll need to say if the member is suspended or if there are any investigations under way. You'll then move on to the Establishment details section.

Suspension

The teacher suspended from duty or is an investigation pending for any reason? *

☒ Yes ☐ No

Upload the copy of the suspension letter *

Has there been any contact with the DfE, the Disclosure and Barring Service or the Teaching Regulation Agency regarding any suspension/investigation? If yes, give details and a named contact.

☒ Establishment details

☐ Applicants details

☐ Salary and service

Establishment details

Establishment Number
029373

Establishment Name
The Starship Children's Centre

Establishment Address
Bar Hill Primary School, Gladeside, Bar Hill, Cambridgeshire, CB23 8DY, UK.

Is the teacher in eligible employment (with the exception of opted out members)? Is there a continuing contractual arrangement between the employer and the member? *

☒ Yes ☐ No

Does the teacher have a supply or zero-hours contract? *

☒ No ☐ Supply Contract Date ☐ Zero-hours

Do you consider this member to have an employment contract? *

☒ Yes ☐ No

Do you consider that there is a continuing contractual relationship? *

☒ Yes ☐ No

Teacher benefits cannot be paid until the teacher's contractual relationship ceases.

Ill-health Retirement - Part B

Depending on the answers provided on this page, there is conditional content you might need to complete.

You can see the examples on this slide.

Is the teacher in eligible employment (with the exception of opted out members)? Is there a continuing contractual arrangement between the employer and the member? *

☒ Yes ☐ No

Does the teacher have a supply or zero-hours contract? *

☒ No ☐ Supply Contract Date ☐ Zero-hours

Do you consider this member to have an employment contract? *

☒ Yes ☐ No

Do you consider that there is a continuing contractual relationship? *

☒ Yes ☐ No

Teacher benefits cannot be paid until the teacher's contractual relationship ceases.

Is the teacher in eligible employment (with the exception of opted out members)? Is there a continuing contractual arrangement between the employer and the member? *

☐ Yes ☒ No

Last date of eligible employment *

dd/mm/yyyy

Does the teacher have a supply or zero-hours contract? *

☒ No ☐ Supply Contract Date ☐ Zero-hours

Do you consider this member to have an employment contract? *

☐ Yes ☐ No

Back Save Continue

Does the teacher have a supply or zero-hours contract? *

☐ No ☐ Supply Contract Date ☒ Zero-hours

Zero-hours Date *

dd/mm/yyyy

If the member is a supply teacher there must still be an ongoing contractual relationship with the establishment. Being on a supply list does not necessarily mean there is a contractual relationship.

Do you consider this member to have an employment contract? *

☐ Yes ☐ No

Ill-health Retirement - Part B

Next, you'll need to provide more information about how the illness has impacted the members working pattern, adjustments that have been made etc.

Teachers' Pensions | For Employers

Cancel

Ill-health retirement request

Review your member's ill-health retirement request before proceeding.

Essential details

Establishment details

Applicants details

Salary and service

Declaration

Applicants details

Provide details of any rehabilitation, workplace adjustments, work content or pattern adjustment, increased support or redeployment that have been made in the case.

Enter details

Impact on Working Patterns ⓘ

Has the member had a reduction in responsibility (salary or hours) due to the same illness that is triggering this application? *

☐ Yes ☒ No

Career Average Members Only

Career Average 2015 Scheme (stepping down taken previously)

☒ As per our records, the member had a step down in salary rate on account of ill-health with the previous employer(s).

Career Average 2015 Scheme ⓘ

Is the current ill-health of the member linked to the medical condition that led to the step down in full-time equivalent salary rate? *

☐ Yes ☐ No ☐ Not applicable

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 ⓘ
<div>Add +</div>					

Was or will ill-health be one of the factors in the teacher leaving pensionable service? *

☐ Yes ☐ No

Back

Continue

Ill-health Retirement - Part B

If applicable you'll need to say if a previous stepping down was linked to this current medical issue, as well as providing information regarding sick leave.

This box is like the service and salary tables seen earlier, where you can add and edit rows as needed.

Ill-health retirement request

Review your member's ill-health retirement request before proceeding.

✓ Essential details

✓ Establishment details

● Applicants details

○ Salary and service

○ Declaration

Applicants details

Provide details of any rehabilitation, workplace adjustments, work content or pattern adjustment, increased support or redeployment that have been made in the case.

Enter details

Impact on Working Patterns ⓘ

Has the member had a reduction in responsibility (salary or hours) due to the same illness that is triggering this application? *

☒ Yes ☐ No

Start Date of Reduction	End Date of Reduction	New Salary Amount ⓘ	Change in Hours (Full to Part-time) ⓘ
<div>dd/mm/yyyy</div> <div></div>	<div>dd/mm/yyyy</div> <div></div>	<div>-</div> <div></div>	<div>-</div> <div></div>
<div>Add +</div>			

Career Average Members Only

Career Average 2015 Scheme (Stepping down taken previously)

ⓘ As per our records, the member had a step down in salary rate on account of ill-health with the previous employer(s).

Ill-health Retirement - Part B

Next, is the service and salary. This requires more details than other retirement applications.

Unlike the other forms, you'll see two years of previous service lines rather than one and a requirement to add more information regarding the teacher's status.

Essential details Establishment details Applicants details **Salary and service** Declaration

Salary and service details

a) Will this teacher receive notice pay at the end of their contract? *

☐ Yes ☒ No ☐ Unknown

b) Will the notice pay (i.e. 12 weeks of salary) be under the person's contract of employment and therefore pensionable? *

☒ Yes ☐ No ☐ Unknown

c) Is a single payment being made in lieu of notice, unrelated to a period of service? This will be non-pensionable. *

Note: you cannot select 'Yes' here if you have already selected 'Yes' in (b).

☒ Yes ☐ No ☐ Unknown

[Update service and salary information by clicking 'Edit'.](#)

Service and Salary Information prior to leaving eligible employment. [Edit](#)

Employment Reference	Full-time/Part-time Indicator	Local Authority Number	Establishment Number	Start Date	End Date	Full-time Annual Salary (£)	Part-time Earning
☒ 33515241	Full-time	123	009	01/02/2024	01/03/2024	£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	

Projected services and salary information can be specified by using the 'Add' button.

Projected services and salary information

Employment Reference	Role Identifier	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	01/03/2024	£20,062.00

[Add +](#)

Is there any pensionable teaching service still to be paid up to the end of the member's contract? *

☒ Yes ☐ No

[Provide the expected date of cessation of pensionable teaching service. If unknown, we will issue a further form if the member is accepted.](#)

Date *

dd/mm/yyyy [Calendar](#)

Is the teacher still delivering lessons, classes, lectures, tutorials, etc.? *

☒ Yes ☐ No

When is the member due to cease this activity? *

dd/mm/yyyy [Calendar](#)

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

Stepping down - Part A

At the bottom of the page, you will need complete the Service and salary details.

Stepping down in salary rate request

Review your member's stepping down in salary rate request before proceeding.

Personal details

Title <i>Mr</i>	First Name John	Last Name Smith
Teacher Reference Number 6453625	National Insurance Number AA123456Q	Date of Birth 12/02/1994

Contact details

Address 11b Lingfield Point, Darlington DL1 1AX, United Kingdom.	Email Address john.smith@gmail.com	Contact Number (Mobile) +44 745 606 6166
Contact Number (Home) +44 345 606 6166		

Additional details

Last day of service in your higher paid post.
12/02/2010

Date of taking up lower salary rate as a result of ill-health.
12/02/2011

Have you reduced your hours?
☒ No

Details of medical condition causing the reduction in salary rate.
Details of medical condition

Employment details

Job role/title including subjects taught prior to stepping down. *

Establishment Name	Role Description	Code	Subject Taught	Age Range ①	Duration Post Held (From)	Duration Post Held (To)	Percent of Full-time Co...
The Starship Children's Centre	Deputy Head	3	Mathematics	10-15	12/04/2023	01/04/2024	40%
Acorn's Children's Centre	Teacher/Lecturer	1	Advance Maths	10-15	12/04/2023	01/04/2024	30%
Acorns Family Hub	Head Teacher / Vice Principal	4	Statistics	10-15	12/04/2023	01/04/2024	30%

Job role/title including subjects taught after stepping down. *

Establishment Name	Role Description	Code	Subject Taught	Age Range ①	Duration Post Held (From)	Duration Post Held (To)	Percent of Full-time Co...
The Starship Children's Centre	Deputy Head	3	Mathematics	10-15	12/04/2023	01/04/2024	40%
Acorn's Children's Centre	Teacher/Lecturer	1	Advance Maths	10-15	12/04/2023	01/04/2024	30%
Acorns Family Hub	Head Teacher / Vice Principal	4	Statistics	10-15	12/04/2023	01/04/2024	30%

Service and salary details

Details of the teacher's service and salary before and after the stepping down with this employer.

Establishment Name	Full-time or Part-time	Start Date	End Date	Full-time or Equivalent Annual Rate of Pensionable Earnings (£)	Full-time Contract (%)
Before stepping down	Full-time	12/01/2023	12/01/2024	£2,000.00	Value
After stepping down	Part-time	12/01/2023	-	£2,000.00	Value

Back

Refer to Teachers' Pensions

Continue

Stepping down - Part B

Stepping down in salary rate request

Review your member's stepping down in salary rate request before proceeding.

Declaration

This certificate must be completed and signed by a responsible officer of the Local Authority, not the school, in respect of all maintained schools including foundation and voluntary aided schools. In the case of other institutions such as Academies, the certificate must be signed by a responsible officer of the academy trust. This individual cannot be a member of the teaching staff.

Name of Authorised Officer

John Smith

Position

Primary Contact

Contact Number (Home)

+44 34826 02342

Email Address

john.smith@cambridge.edu

☒ I certify that the teacher moved to a lower paid salary rate on **12/02/2023**.

☒ I certify that the terms of that employment are changed wholly or partly because of this member's ill-health.

Back

Submit

You'll then complete the Declaration.

Career journey and other applications

- Transfer in
- Transfers out
- Opting in
- Opting out
- Repayment
- Flexibilities
- Certificate of Re-employment
- Cash Equivalent Transfer Value (CETV) request
- Death notification request

Transfer in - Part A

Transfer in

Review your member's transfer-in request before proceeding.

Personal details

Title <i>Mr</i>	First Name John	Last Name Smith
Teacher Reference Number 2999499	National Insurance Number AA123456Q	Date of Birth 12/02/1994
Marital Status <i>Married</i>		

Contact details

Address 11b Lingfield Point, Darlington DL1 1AX, United Kingdom.	Email Address john.smith@gmail.com	Contact Number (Mobile) +44 715 606 6166
Contact Number (Home) +44 345 606 6166		

Transfer details

Ceding plan details	Value
Your pension provider name	Aviva pension plan
Scheme name	Self invested pension
Total transfer value	£15,500.64

Back

Refer to Teachers' Pensions

Continue

Reason for referral or rejection *

×

Provide the reason for referring or rejecting the member request. Eg.
Reason could be if the member data is not correct, etc.

Comment

Back

Submit

Case Reference	Submitted By	Submitted On	Type	Status	Case Remarks
3845	Michael Parker	12/10/2023 16:23	Retirement request	Referred to TPS	

As with other forms in this guide, Part A allows you to review the member details. You can then refer or continue.

Transfer in - Part B

Then review the recent service and salary details.

A general application will show the last 12 months of service (if in employment for that length of time).

If you believe any of the information is incorrect you can update it. Click on the line you wish to edit, and then click the edit option on the right of the screen.

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

Service and Salary Information prior to leaving eligible employment.

	Employment Reference	Full-time/Part-time Indicator	Local Authority Number	Establishment Number	Start Date	End Date	Full-time Annual Salary (£)	Part-time Earnings
☒	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	

Edit 

	Employment Reference	Full-time/Part-time Indicator	Local Authority Number	Establishment Number	Start Date	End Date	Full-time Annual Salary (£)	Part-time Earnings (£)	Days Out	Additional Pensionable Payments (£)	Overtime Gross Amount (£)	Withdrawal
☒	33515241	Full-time	123	009	01/02/2024	01/01/2024	£20,062.00	-	58	£2,062.00	£262.00	W
☒	11515241	Full-time	123	009	01/01/2024	01/02/2024	£20,062.00	-	58	£2,062.00	£262.00	W
☐	32515241	Full-time	123	009	01/12/2023	01/01/2024	£20,062.00	-	58	£2,062.00	£262.00	W

You'll need to scroll along the table to provide all the necessary information. You can see the full table above.

Transfer in - Part B

Transfer in

Review your member's transfer-in request before proceeding.

☒ Member request details

☒ Employment details

☐ Declaration

Employment details

Establishment Number
009/7571

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

Service and salary information

Edit 

Employment Reference	Full-time/Part-time Indicator	Local Authority Number	Establishment Number	Start Date	End Date	Full-time Annual Salary (£)	Part-time Earning
☐ 33515241	Full-time	123	009	01/02/2024	01/03/2024	£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	

① Projected services and salary information can be specified by clicking the 'Add' button.

Projected services and salary information

Employment Reference	Role Identifier	Full-time/Part-time Indicator	Local Authority Number	Establishment Number	Start Date	End Date	Full-time Annual Salary
<div>Add </div>							

Back

Continue

Then review the recent service and salary details.

If you believe any of the information is incorrect you can update it. Click on the line you wish to edit, and then click the edit option on the right of the screen.

You can find more information about this earlier in the guide (Age and Early Retirement).

Transfer in - Part B

Transfer in

Review your member's transfer-in request before proceeding.

✔ Member request details

✔ Employment details

● Declaration

Declaration

The certificate must be signed by a responsible officer of the Local Authority, not the school, in respect of all maintained schools including both foundation and voluntary aided schools. In the case of other institutions, the certificate must be signed by a responsible officer or chairperson of the governing body. This cannot be a member of the teaching staff.

Name of Authorised Officer

John Smith

Position

Primary Contact

Contact Number (Mobile)

+44 74826 02342

Email Address

john.smith@cambridge.edu

✔ I verify the accuracy of the provided information and have conducted a thorough review of transfer-in request.

Back

Submit

You'll then complete the Declaration.

Are you sure you want to submit?



The request cannot be cancelled once submitted.

Cancel

Submit



We have received your request. To check the status of this in transaction history use reference 3845.

If we require any further information we will get in touch with you.

View transaction history

Return to dashboard

Transfer out - Part A

For Employers

Cancel

Transfer out

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

Personal details

Title	First Name	Last Name
Mr	John	Smith
Teacher Reference Number	National Insurance Number	Date of Birth
9929349	AA123456Q	12/02/1994

Contact details

Address	Email Address	Contact Number (Mobile)
11b Lingfield Point, Darlington DL1 1AX, United Kingdom.	john.smith@gmail.com	+44 745 606 6166
Contact Number (Home)		
+44 345 606 6166		

Transfer-out scheme details

Transfer-out Scheme	Scheme Name or Independent Financial Adviser
A transfer to another registered Defined Benefits scheme	Aviva pension plan
Address	Date Started in New Scheme
49 Featherstone, London, EC1Y 8SY, United Kingdom.	12/02/2023
Ceding Scheme Details	Value
Scheme name	Teachers' Pension scheme

Back

Refer to Teachers' Pensions

Continue

As with other forms in this guide, Part A allows you to review the member details. You can then refer or continue.

Transfer out - Part B

You'll provide the updated service and salary information, followed by the Declaration.

Transfer out

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

Member request details

Employment details

Declaration

Employment details

Establishment Number
009/7571

Update service and salary information by clicking 'Edit'.

Service and salary information

Edit

Employment Reference	Full-time/Part-time Indicator	Local Authority Number	Establishment Number	Start Date	End Date	Full-time Annual Salary (£)	Part-time Earning
☐ -	Select	123	009	dd/mm/yyyy	dd/mm/yyyy	Enter amount	
☐ 33515241	Full-time	123	009	01/02/2024	01/03/2024	£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	
<div>Add</div>							

Back

Continue

Transfer out

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

Member request details

Employment details

Declaration

Declaration

The certificate must be signed by a responsible officer of the Local Authority, not the school, in respect of all maintained schools including both foundation and voluntary aided schools. In the case of other institutions, the certificate must be signed by a responsible officer or chairperson of the governing body. This cannot be a member of the teaching staff.

Name of Authorised Officer
John Smith

Position
Primary Contact

Contact Number (Mobile)
+44 74826 02342

Email Address
john.smith@cambridge.edu

☒ I verify the accuracy of the provided information and have conducted a thorough review of transfer-out request.

Back

Submit

Opting in - Part A

Part A allows you to review the member details.
You can then refer or continue.

 Teachers' Pensions | For Employers

Cancel

Opt in

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

Personal details

Title	First Name	Last Name
Mr	John	Smith
Teacher Reference Number	National Insurance Number	Date of Birth
6453625	AA123456Q	12/02/1994

Contact details

Address	Email Address	Contact Number (Mobile)
11b Lingfield Point, Darlington DL1 1AX, United Kingdom.	john.smith@gmail.com	+44 745 606 6166
Contact Number (Home)		
+44 345 606 6166		

Employment details

Employment Reference	Employment Type	Employer Name	Enrolment Type	Joining Date	Opt-out Date
84621423	Part-time	Lightcliffe Academy	Contractual	12/12/2002	12/12/2006

Back

Refer to Teachers' Pensions

Continue

Opting in - Part B

Opt in

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

Effective date of election

This form is not to be used for auto or contractual enrolment. Find out more about what you need to do for these types of enrolment on our website.

Part-time elections:

The effective date will be the first day of the month following the month in which the application was received by Teachers' Pensions.

Opting in elections:

- The effective date will be the first day of the month following the month in which the application was received by Teachers' Pensions. An election takes effect from the first day of the month.
- An election takes effect from the first day of the month after the election was received by Teachers' Pensions or, if it was received within 3 months of the start of any period of employment that would otherwise be pensionable, from the first day of the employment.
- If you want the election to be accepted from an earlier date than the current date - and contributions have been deducted from the member salary - please provide copies of payslips to support the application.
- This form should not be used for auto-enrolment of member into the Teachers' Pension Scheme (TPS). Employers should instead complete the 'Auto-enrolment' template which is available via the employer portal.
- Employers must commence deductions of contributions immediately from the effective date. If a retrospective election is required, the employer must confirm the date from which contributions were deducted and submitted to the Teachers' Pension Scheme. Evidence is required.

Selected employment details

Employment Reference 84621423

Employment Type
Part-time

Employer Name
Lightcliffe Academy

Is the teacher employed full-time or part-time at the point of opting in?

☐ Full-time ☐ Part-time

Back

Continue

Opt in

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

Effective date of election

This form is not to be used for auto or contractual enrolment. Find out more about what you need to do for these types of enrolment on our website.

Part-time elections:

The effective date will be the first day of the month following the month in which the application was received by Teachers' Pensions.

Opting in elections:

- The effective date will be the first day of the month following the month in which the application was received by Teachers' Pensions. An election takes effect from the first day of the month.
- An election takes effect from the first day of the month after the election was received by Teachers' Pensions or, if it was received within 3 months of the start of any period of employment that would otherwise be pensionable, from the first day of the employment.
- If you want the election to be accepted from an earlier date than the current date - and contributions have been deducted from the member salary - please provide copies of payslips to support the application.
- This form should not be used for auto-enrolment of member into the Teachers' Pension Scheme (TPS). Employers should instead complete the 'Auto-enrolment' template which is available via the employer portal.
- Employers must commence deductions of contributions immediately from the effective date. If a retrospective election is required, the employer must confirm the date from which contributions were deducted and submitted to the Teachers' Pension Scheme. Evidence is required.

Selected employment details

Employment Reference 84621423

Employment Type
Part-time

Employer Name
Lightcliffe Academy

Is the teacher employed full-time or part-time at the point of opting in?

☒ Full-time ☐ Part-time

Full-time equivalent salary at the point of opting in

£ 25,000.00

Actual annual salary at the point of opting in

£ Value

If retrospective is required have contributions been deducted and remitted to the Teachers' Pension Scheme each month?

☒ Yes ☐ No

☐ Provide copies of documentary evidence. (i.e. copy of payslips or payroll extract).

Upload

Effective date of election

dd/mm/yyyy

Back

Continue

If the request is retrospective, you'll need to provide evidence via the upload function.

Opting out - Part A

Part A allows you to review the member details. You can then refer or continue.

Teachers' Pensions | For Employers

Cancel

Opt out

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

Personal details

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

Contact details

Address	Email Address	Contact Number (Mobile)
11b Lingfield Point, Darlington DL1 1AX, United Kingdom.	john.smith@gmail.com	+44 745 606 6166
Contact Number (Home)		
+44 345 606 6166		

Additional details

Date Received by Employer	Auto-enrolment or Auto-Re-enrolment Date	Most Recent Contractual Enrolment Date ⓘ
01/02/2022	12/10/2006	12/10/2004

Employment details

Employment Reference	Employment Type	Employer Name	Enrolment Type	Joining Date	Opt-in Date	Opt-out Reason
84621423	Part-time	Lightcliffe Academ	Contractual	12/12/2000	12/12/2006	Personal financial reasons
15246721	Full-time	The Starship Children's Centre	Auto-enrolment	12/12/2008	-	Leaving teaching

Back

Refer to Teachers' Pensions

Continue

Opting out - Part B

You'll need to complete the Employment Details section. This includes information about any contributions taken.

You'll need to do this for any relevant contract the member has requested to opt out from (in your employment).

Opt out

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

Selected employment details

Employment reference 15246721

Contract type	Employer name	Enrolment type
Full Time	The Starship Children's Centre	Auto
Joining date	Opt in date	Opt out reason
12/12/2000	12/12/2004	Personal financial reasons

Have pension contributions already been deducted from the salary?

☐ Yes ☐ No

Employment reference 84621423

Contract Type	Employer Name	Enrolment Type
Full-time	The Starship Children's Centre	Auto-enrolment
Joining Date	Opt-in Date	Opt-out Reason
12/12/2008	-	Leaving teaching

Have any pension contributions already been deducted from the salary?

☐ Yes ☐ No

Back

Continue

Opt out

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

Selected employment details

Employment reference 15246721

Contract type	Employer name	Enrolment type
Full Time	The Starship Children's Centre	Auto
Joining date	Opt in date	Opt out reason
12/12/2000	12/12/2004	Personal financial reasons

Have pension contributions already been deducted from the salary?

☒ Yes ☐ No

From

dd/mm/yyyy

To

dd/mm/yyyy

At the time of the member opting out or leaving pensionable service,

Full time equivalent annual salary *

€ 0.00

Working pattern as a percentage *

Enter value

☒ If the employee is on a supply or irregular hours contract, enter 'Irregular' in the box above. Otherwise provide a percentage.

Employment reference 84621423

Contract Type	Employer Name	Enrolment Type
Full-time	The Starship Children's Centre	Auto-enrolment
Joining Date	Opt-in Date	Opt-out Reason
12/12/2008	-	Leaving teaching

Have any pension contributions already been deducted from the salary?

☐ Yes ☐ No

Back

Continue

Repayment - Part A

Part A allows you to review the member details. You can then refer or continue.

For Employers

Cancel

Repayment of pension contribution

Review your member's repayment request before proceeding.

Personal details

Title Mr	First Name John	Last Name Smith
Teacher Reference Number 6453625	National Insurance Number AA123456Q	Date of Birth 12/02/1994

Contact and additional details

Edit 

Last Date of Teaching Employment 12/02/2024	Email Address john.smith@gmail.com	Address 11b Lingfield Point, Darlington DL1 1AX, United Kingdom.
Contact Number (Mobile) +44 745 606 6166	Contact Number (Home) +44 345 606 6166	

 If the last date of teaching employment is not correct please update it.

Back

Refer to Teachers' Pensions

Continue

Repayment - Part B

You'll need to provide additional information in Part B compared to other forms.

This includes:

- If there's been any years where the member has paid reduced or increased pension contributions.
- If the member is on maternity leave, with the right to return to work
- If the member has been contracted out of the State Pension.

Teachers' Pensions | For Employers

Cancel

Repayment of pension contribution

Review your member's repayment request before proceeding.

Member request details

Employer information

Employment details

Declaration

Employer information

This section should only be completed if the applicant is currently in pensionable or excluded employment or left within the last two years.

Teachers' Pension Scheme contributions *

Show any financial year(s) in which reduced / increased pension contributions were paid by the member.

Financial Year	Value
2023 - 2024	£1,500.64
2020 - 2021	£1,800.64
2017 - 2018	£2,500.64
<div>Add +</div>	

Is the member on maternity leave with the right to return to work? *

Yes

No

National Insurance (only for periods of pensionable employment under Teachers' Pension Scheme). *

The Teachers' Pension Scheme ceased to be contracted-out of the additional state pension with effect from 6 April 2016. If the last two tax years of the teacher's pensionable employment include the tax year ending on 5 April 2016, please provide the amount of National Insurance contracted out earnings for that year. If a married woman option exists, Category 'E'. Married Woman's Election to pay a low rate of NI contributions. No GMP until 6 April 1991. Failure to provide this information may jeopardise the payment of any benefits claimed by the teacher against the state second pension.

	Year	£
Tax year of termination	<div>Enter value</div>	<div>Enter value</div>
Preceding tax year	<div>Enter value</div>	<div>Enter value</div>

Back

Continue

Repayment - Part B

Member request details

Employer information

Employment details

Declaration

Employment details

Establishment Number
009

Is the member an overseas teacher? *

☐ Yes ☒ No

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

Service and salary information. Edit 

	Employment Reference	Full-time/Part-time Indicator	Local Authority Number	Establishment Number	Start Date	End Date	Full-time Annual Salary (£)	Part-Earning
☐	33515241	Full-time	123	009	01/02/2024	01/03/2024	£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	

i Projected services and salary information can be specified by clicking the 'Add' button.

Projected services and salary information

	Employment Reference	Role Identifier	Full-time/Part-time Indicator	Local Authority Number	Establishment Number	Start Date	End Date	Full-time Annual Salary
<div>Add </div>								

Next is the Employment Details section - this is standard, aside from the first question you need to complete.

This asks if the member is an overseas teacher.

Flexibilities - Part A and B

Flexibilities request

Review your member's flexibilities request before proceeding.

Personal details

Title	First Name	Last Name
Mr	John	Smith
Teacher Reference Number	National Insurance Number	Date of Birth
6453625	AA123456Q	12/02/1994

Contact details

Address	Email Address	Contact Number (Mobile)
11b Lingfield Point, Darlington DL1 1AX, United Kingdom.	john.smith@gmail.com	+44 745 606 6166
Contact Number (Home)		
+44 345 606 6166		

Additional pension details

Employment Reference	Employment Type	Joining Date	Purchase Value (£)	Dependent Benefits	Payment	Payee
Lightcliffe Academy			£250	Yes	Lump Sum	Employer
15246721	Part-time	22/01/2020				

Part A will show you which flexibilities the member has applied for.

Flexibilities request

Review your member's flexibilities request before proceeding.

Declaration

The certificate must be signed by a responsible officer of the Local Authority, not the school, in respect of all maintained schools including both foundation and voluntary aided schools. In the case of other institutions, the certificate must be signed by a responsible officer or chairperson of the governing body. This cannot be a member of the teaching staff.

Name of Authorised Officer	Position
John	Primary contact
Contact Number (Mobile)	Email Address
+44 745 606 6166	john.smith@gmail.com

☒ I confirm that this teacher is or will be in pensionable employment.

Back

Submit

Certificate of Re employment - Part A

Certificate of re-employment request

Review your member's request before proceeding.

Part A allows you to review the member details. You can then refer or continue.

Personal details

Title Mr	First Name John	Last Name Smith
Teacher Reference Number 01/23244	National Insurance Number AA123456Q	Date of Birth 12/02/1952

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		

Additional details

Type of Compensation Mandatory Compensation	Establishment Number 009/7571	Date of First Commenced 12/02/2024
--	----------------------------------	---------------------------------------

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[Refer to Teachers' Pensions](#)

[Continue](#)

Certificate of Re employment - Part B

You'll then need to complete the Employment details and Declaration pages. This includes information regarding their last date of employment and part time arrangements.

Certificate of re-employment request

Review your member's request before proceeding.

Employment details

Declaration

Employment details

Establishment Number

009/7571

Last Date of Employment

12/02/2024

If Part-time, indicate proportion of Full-time

Enter value (e.g. 50%)

Is the pensioner in further employment on a supply basis?

Yes

No

Update service and salary information by clicking 'Edit'.

Service and salary information from the commencement date of ASAR

Edit

Employment Reference	Full-time/Part-time Indicator	Local Authority Number	Establishment Number	Start Date	End Date	Full-time Annual Salary (£)	Part-Earning
☐ 33515241	Full-time	123	009	01/02/2024	01/03/2024	£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	

Projected services and salary information can be specified by clicking the 'Add' button.

Projected services and salary information

Employment Reference	Role Identifier	Full-time/Part-time Indicator	Local Authority Number	Establishment Number	Start Date	End Date	Full-time An Salar
<div>Add</div>							

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Continue

CETV request - Part A and B

Pension sharing request CETV

Review your member's pension sharing request CETV before proceeding.

Part A allows you to review the member details. You can then refer or continue.

Personal details

Title

Mr

First Name

John

Last Name

Smith

Teacher Reference Number

6453625

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)

+44 745 606 6166

Contact Number (Home)

+44 345 606 6166

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Refer to Teachers' Pensions

Continue

Notification of death- Employer

The first page you come to will show you the members details.

Salary update for death notification

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
Date of Death 30/01/2025			

Additional details of deceased member

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 **i**

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

All - Part B

At the end of each application, you'll go to a confirmation page. This will show you a reference number for the case you have raised.

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

Teachers' For Employers

We have received your request. To check the status of this in transaction history use reference 7924.

If we require any further information we will get in touch with you.

[View transaction history](#) [Return to dashboard](#)

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Teachers' 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...

All - Part B

Teachers' Pensions

For Employers

DashboardMemberMonthly SubmissionPayrollSupport

Secure MailProfile

Manage MemberSearch MemberTransaction History

Transaction history

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

Establishment Name

Livingstone primary school009/1234

View Establishment Profile

Period2026

Filter bySelect

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: 01Items per page: 10

< 1 2 ... 10 >

Once you're in Transaction history, you will be able to see your previous cases. You can filter and search for the one you're looking for.

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

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Read our guides

We've other guides to help you navigate the Employer Portal. [You can read these on our website.](#)

- Registration recap
- Managing members
- Monthly Contributions
- My Pensions Online overview.

If you have any questions, [please contact our Employer Support Team.](#)