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## Hello

Welcome to April's e-bulletin with all the latest news and updates useful for anyone who administers the Teachers' Pension Scheme.



## Annual Service Return (non-MDC users only)

HM Revenue & Customs require employers to provide data to administrators by 6 July each year. We need you to provide accurate data to allow your employees enough time to receive their Pension Savings Statement and carry out self-assessment procedures on time. This year we've uploaded a SCHEDPRNT for all employers. If you're still submitting Annual Returns from your own system, you can use it to check what member information we hold on our database.

We've also updated our guidelines on completing the Annual Return.

[Find out more >](#)



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## Monthly Data Collection (MDC) Update

MDC is now available for all employers. Over 540 employers representing 60,000 members are on-boarding this month and making their first submission by 7 May. This window is likely to close soon but we're onboarding for June and the following months.

We're keen to understand your plans for MDC to ensure we can give each employer the on-boarding date that works for you. So we need to hear from you.

[Find out more >](#)


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## End of Year Certificate (EOYC)

Every employer without exception is required to submit an unaudited EOYC (if not already audited) by the due date of 31 May 2016. It's used to check that contributions submitted match the contributions that are due. The templates for these forms have now been revised to take account of the change in the Employer Contribution Rate at 1 September 2015, and are available to download from our website.

[Find out more >](#)

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## Updated III-Health and Stepping Down information

We've updated our website and related forms to clarify how Stepping Down in the Career Average arrangement works in relation to III-Health Retirements.


The amended forms can be reviewed below:

[Stepping Down Election for Career Average Scheme members](#)  
[III-health retirement application](#)  
[III-health Medical Information Form](#)

III-health Stepping Down in the Career Average arrangement is completely different to the old Stepping Down election which applied to members of the Final Salary arrangement up to 2006.

To read more about these forms, and for further guidance on III-Health Retirement click the link below.

[Find out more >](#)

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## Service Returns - one off payments

We've recently had some queries about how to record one-off bonus payments in service returns. We've provided an updated example in the Payroll Guide - please see example 11 in section 5.1.1.

[View a copy of the guide >](#)

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## Updated HR and Payroll Guides

We've updated both the HR and Payroll Guides. We've also streamlined them to avoid duplication. Key areas we've changed are:-

- Contributions
- MDC
- Auto Enrolment

[See the most up to date versions >](#)

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## New form for members returning to the Scheme

If a member is returning to the Teachers' Pension Scheme after a break of more than 5 years, any service during that period in another public service scheme may mean that they retain previously held protections or, in the case of returners, their Salary Link in the Teachers' Pension Scheme.

It's important to understand more about how someone qualifies, how this works across the different arrangements and how to access the new form.

[Find out more >](#)



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## Teachers' Planning Retirement seminars

We've received several queries regarding seminars for teachers approaching retirement, which are being offered by 'Teachers' Planning Retirement', the 'Teachers Retirement Agency' as well as other providers.

Teachers' Pensions don't provide advice services and these seminars are not being delivered by Teachers' Pensions, nor do we appoint companies to deliver the seminars on our behalf. The only member presentations we deliver are through our partnership with the Prudential.

[Find out more >](#)

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## Retirement forms reminder

Can we just remind you of the importance of including the 'Withdrawal Indicator' when a member has left employment.

Problems occur if this is not updated at the calculation stage and can lead to delays.



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## Retirement forms have moved online

As of 20 April, both the Age and the Early Retirement forms are now only available to access online via My Pension Online. This is to ensure the process is as streamlined as possible and that forms can be processed quickly and easily online.

Therefore, we ask that you encourage members to sign up for a My Pension Online account to ensure they don't delay their retirement plans.

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## Benefit Statements - Now online

Members can now access their Benefit Statement as well as their personal pension information online anytime they need to. This means they'll no longer receive a paper copy of their Benefit Statement (unless previously requested).

We're informing members of the change but it would be helpful if you could encourage your employees to register for My Pension Online (MPO) too and make them aware of the changes.

We've created a series of tools to make it easy to share this information.

[Find out more >](#)

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# Employer Review

The Employer Review continues with a second round of Focus Groups taking place in May where we're planning to discuss the proposed model going forward. We'll also be looking at the feedback from the End of Year Certificate.

We'll be circulating the model to you shortly providing you the opportunity to feedback on the process.



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Teachers' Pensions, 11b Lingfield Point, Darlington, DL1 1AX.

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