

---

STATUTORY RULES OF NORTHERN IRELAND

---

**1998 No. 333**

**EDUCATION**

**Teachers' Superannuation Regulations (Northern Ireland) 1998**

Made - - - - 22nd September  
1998  
Coming into operation 2nd November 1998

**TEACHERS' SUPERANNUATION  
REGULATIONS (NORTHERN IRELAND) 1998**

Part A

Preliminary

- A1 Citation and commencement
- A2 Interpretation

Part B

Pensionable Employment

- B1 Employment — general
- B2 Continuing employment
- B3 Exclusion from pensionable employment
- B4 Election not to be pensionable
- B5 Election to rejoin pensionable service

Part C

Teachers' Contributions

- C1 Salary on which contributions are payable
- C2 Ordinary contributions
- C3 Contributions for past added years
- C4 Contributions for past added years by family pensioner
- C5 Contributions for past added years under earlier provisions
- C6 Additional contributions for current period
- C7 Additional contributions for current period: service in a reserve force
- C8 Contributions for family benefits
- C9 Right to repayment of balance of contributions
- C10 Calculation of balance of contributions

*Status: This is the original version (as it was originally made). This item of legislation is currently only available in its original format.*

- C11 Repayment of certain contributions paid for family benefits
- C12 Application for repayment
- C13 Return of repaid contributions
- C14 Uncompleted return by instalments of repaid contributions
- C15 Deduction, payment and recovery of contributions

Part D

Reckonable Service

- D1 Reckonable service generally
- D2 Exclusion from reckonable service
- D3 Past period for which additional contributions have been paid
- D4 Current period for which additional contributions have been paid

Part E

Benefits

- E1 Overriding provision as to guaranteed minimum pensions
- E2 Nature of retirement benefits
- E3 Qualification for retirement benefits
- E4 Entitlement to payment of retirement benefits
- E5 Amount of retirement pension
- E6 Amount of retirement lump sum
- E7 Limitation of retirement benefits where salary reduced
- E8 Enhancement of retirement benefits in case of incapacity
- E9 Avoidance of duplicate pensions
- E10 National Insurance modification of pensions
- E11 Allocation of part of retirement pension
- E12 Duration of retirement pension
- E13 Pensioner ceasing to be incapacitated
- E14 Abatement of retirement pension during further employment
- E15 Retirement benefits on cessation of further employment
- E16 Short service annuity
- E17 Short service incapacity grant
- E18 Deferral, etc, of benefits
- E19 Commutation: exceptional circumstances of ill health
- E20 Death grants
- E21 Supplementary death grants
- E22 Family benefits generally
- E23 Nomination of beneficiaries
- E24 Entitlement to short-term family benefits
- E25 Amount and duration of short-term family benefits
- E26 Entitlement to long-term family benefits
- E27 Relevant service
- E28 Amounts of spouses' and nominated beneficiaries' long-term pensions
- E29 Amounts of children's long-term pensions
- E30 Commencement and duration of long-term family pensions
- E31 Average salary
- E32 Effective reckonable service
- E33 Payment of benefits
- E34 Benefits not assignable

## Part F

### Transfer Values

- F1 Payment of transfer values
- F2 Amounts of transfer values and additional transfer values
- F3 Termination of right to count reckonable service
- F4 Acceptance of transfer values

## Part G

### Finance

- G1 Teachers' superannuation account
- G2 Receipts, etc., to be credited
- G3 Payments to be debited
- G4 Actuarial inquiries
- G5 Employers' contributions
- G6 Payment by employers to the Department

## Part H

### Miscellaneous and Supplemental

- H1 Modified application in case of employment at reduced salary
  - H2 Records and information
  - H3 Payments in respect of deceased persons
  - H4 Revaluation of guaranteed minimum in certain cases
  - H5 Extension of time
  - H6 Determination of Questions
  - H7 Revocations, savings and transitional provisions
- Signature

---

## SCHEDULE 1 **Glossary of Expressions**

## SCHEDULE 2 **Employments Pensionable without Election**

### Part I

- 1. A teacher employed in a grant-aided school in Northern Ireland...
- 2. A teacher employed in an institution of further or higher...
- 3. A peripatetic teacher employed by an education and library board...
- 4. A teacher in a college of education as defined in...
- 5. A teacher in the University of Ulster on 1st October...
- 6. A teacher in a training school or a remand home,...

### Part II — Employments Pensionable on Election

- 7. A teacher of a kind other than is specified in...
- 8. An organiser who is employed as youth and community worker,...
- 9. An organiser, not falling within paragraph 8, in the employment...
- 10. In this Schedule “elects” means elects by notice in writing...

## SCHEDULE 3 **Maximum Length of Additional Periods**

- 1. (1) Subject to paragraph 2, the maximum length of the...
- 2. (1) This paragraph applies to a person who at the...

*Status: This is the original version (as it was originally made). This item of legislation is currently only available in its original format.*

3. (1) This paragraph applies where a person—  
SCHEDULE **Additional Contributions for past period**  
4
- Part I — Method A
1. (1) In this Part— “the contribution period” means the period...  
2. (1) contribution period shall be one of not less than...  
3. Subject to paragraphs 4 and 5, the rate at which...  
4. (1) At any time during the contribution period the person...  
5. (1) At any time during the contribution period the person...  
6. (1) Where— (a) the person is in pensionable employment at...  
7. (1) Subject to sub-paragraph (2), if the person—  
8. (1) An election under this paragraph may be made when...  
9. (1) An election under this paragraph may be made where...  
10. Where paragraph 7 has become applicable and the person is...  
11. Any retirement lump sum to which the person is entitled...  
12. (1) This paragraph applies— (a) where paragraph 7 has become...  
Part II — Method B
13. (1) Subject to paragraphs 14 to 16, the additional contributions...  
14. (1) Subject to paragraphs 15 and 16 and paragraph 16(3)...  
15. Where notice of the election is received on or after...  
16. Where notice of the election is received when the person...  
SCHEDULE **Additional contributions for past period under earlier provisions**  
5
1. (1) Subject to sub-paragraphs (2) to (5) and paragraphs 2...  
2. Where an election has been made under paragraph 1 the...  
3. If before all the contributions payable under paragraph 1 or...  
4. (1) A person may elect, by giving written notice to...  
5. (1) Subject to sub-paragraph (2) and paragraph 6, where immediately...  
6. (1) If before the end of the contribution period the...  
7. Where immediately before 2nd November 1998 contributions remained to be...  
SCHEDULE **Family Benefits**  
6
- Part I — Contributions: Men and Unmarried Women
1. (1) In this Part— “the Fund” means the Teachers' Family...  
2. Paragraphs 3 and 4 have effect subject to paragraph 5...  
3. (1) Subject to sub-paragraph (3), a member who elected to...  
4. A non-member or an unmarried woman may elect to pay...  
5. (1) A man who has become entitled to payment of...  
6. (1) Where a person has made an election under paragraph...  
7. (1) This paragraph applies where a member who elected to...  
8. (1) Subject to sub-paragraphs (2) and (3), a member or...  
9. (1) This paragraph applies where— (a) a member or non-member...  
Part II — Contributions: Married Women
10. (1) Subject to sub-paragraph (3) and paragraph 11, a woman...  
11. (1) An election under paragraph 10(1) or (2)—  
12. (1) Subject to sub-paragraph (2), where payment is to be...  
13. (1) The widower of a woman who—  
Part III — Contributions: Common Provisions
14. (1) This paragraph applies where— (a) an election is made...  
15. (1) The paragraph— (a) applies where family benefit contributions to...

*Status: This is the original version (as it was originally made). This item of legislation is currently only available in its original format.*

16. Where— (a) a deduction has fallen to be made under...
- SCHEDULE 7 **Reckonable service arising from payment of additional contributions in respect of past periods**
1. (1) In this Schedule— “full-time contributor” means a person who...
2. Where a person— (a) is a full-time contributor who has...
3. (1) This paragraph applies when a person—
4. (1) This paragraph applies to a full-time or part-time contributor,...
5. If a person had elected under paragraph 4 of Schedule...
6. (1) This paragraph applies where a full-time or part-time contributor...
7. (1) This paragraph applies where a lump sum equal to...
8. (1) This paragraph applies where a person paying additional contributions...
9. (1) This paragraph applies where a person is continuing to...
10. (1) This paragraph applies where a person is, in accordance...
- SCHEDULE 8 **Periods making up qualifying period**
1. A period of pensionable employment.
2. A period counting as reckonable service by virtue of regulation...
3. A period of service or employment in respect of which...
4. A period of employment in comparable service.
- SCHEDULE 9 **Modified application in certain cases**
- Part I — National Insurance Modification of pensions
1. In this Part— “the Act” means the National Insurance Act...
2. (1) A retirement pension payable in the case of a...
3. (1) This paragraph applies to a retired teacher who—
4. For the purposes of paragraphs 2 and 3 the reckonable...
5. If, in calculating the amount of a retirement pension, there...
6. If, in calculating the amount of a retirement pension, there...
7. Where— (a) a period of employment of a retired teacher...
8. No reduction in the amount of a retirement pension shall...
9. A retirement pension payable to a part-time teacher, so far...
10. (1) An annual pension in respect of any such service...
11. A part-time teacher to whom paragraph 10 applies is entitled...
12. (1) Any person who was employed in non-participating employment and...
- Part II — Employment at Reduced Salary
13. Subject to paragraphs 14 to 19, these Regulations apply as...
14. For the purposes of regulation E3 (qualification for retirement benefits),...
15. (1) For the purposes of regulation E32(2) (limits on reckonable...
16. (1) A period for which the person has, before the...
17. (1) This paragraph applies if the person becomes entitled to...
18. (1) For the purpose of calculating any death grant under...
19. Regulation E26(7) does not have effect so as to preclude...
- SCHEDULE 10 **Allocation of part of retirement pension**
- Part I — Contents of Declaration
1. (1) A declaration shall specify— (a) the part of the...
- Part II — Procedure
2. (1) A person who, with a view to making an...
3. (1) Before delivering a declaration a person shall have given...

*Status: This is the original version (as it was originally made). This item of legislation is currently only available in its original format.*

4. (1) Before delivering a declaration a person shall also, at...
5. (1) On receiving a notice under paragraph 3 the Department...
6. A declaration, and any notice or other communication under this...
- Part III — Other Matters
7. (1) Subject to sub-paragraphs (2) to (6), a declaration takes...
8. (1) An allocation takes effect on the day on which...
9. (1) If notice of intention has been given under paragraph...
10. (1) If after a retiring employee has delivered a declaration...
11. If after a person has delivered a declaration the rate...
- SCHEDULE **Transfer values**
- 11
- Part I — Outward Transfers
1. A transfer value is calculated on the cash equivalent basis...
2. Where— (a) a transfer value is payable to the scheme...
3. Where— (a) a transfer value is payable to the scheme...
4. Where— (a) a transfer value is payable to the scheme...
5. Where— (a) a transfer value is payable to the scheme...
6. (1) This paragraph applies where— (a) a transfer value falls...
7. Where a transfer value is paid to the scheme managers...
- Part II — Inward Transfers
8. If the employment in which the person was subject to...
9. (1) If— (a) the previous scheme is a club scheme...
10. (1) This paragraph applies where— (a) the condition specified in...
11. If— (a) the previous scheme is an approved superannuation scheme...
- SCHEDULE **Teachers' Superannuation Account**
- 12
- Part 1 — Transitional
1. The account that was required by regulation 80 of the...
2. (1) References in regulations G1 to G3 and in this...
3. (1) For the purposes of Part G—
- Part II — Form of Account
4. The form referred to in regulation G1 is the following:...
- Part III — Notional Interest
5. (1) Subject to sub-paragraph (2) and paragraph 7(3), the notional...
6. (1) In this paragraph “invested” means invested in one or...
7. (1) Any security which is the subject of a notional...
- SCHEDULE **Revocations, savings and transitional provisions**
- 13
- Part I — Revocations
- Part II — Savings
1. The revocation by these Regulations of a transitional provision relating...
2. (1) The revocation by these Regulations of a provision previously...
3. Any document made, served or issued after 1st November 1998...
- Part III — Transitional Provisions
1. (1) The re-enactment of provisions in these Regulations, and the...
2. (1) Where— (a) a provision of these Regulations (“the new...
3. Where a period of time specified in a provision of...
- Explanatory Note