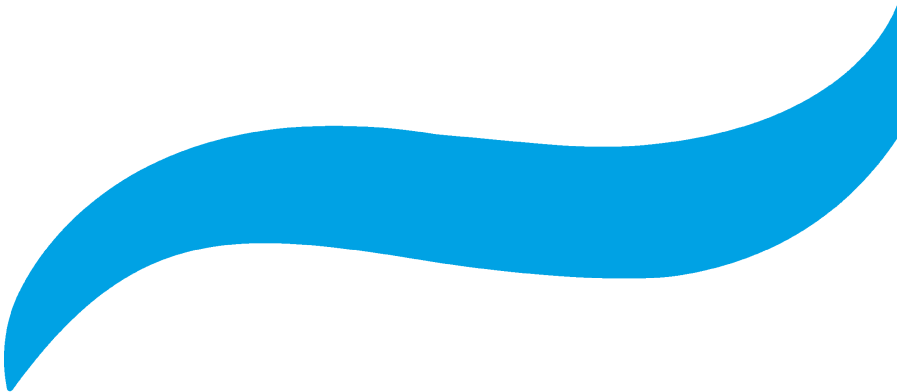


Retirement Guide for Employees



THE RETIREMENT POLICY

The NHSScotland Retirement Policy is for any member of staff who wishes to transition from work to retirement. This includes anyone who wishes to partially retire, or retire and return to employment. The policy can be accessed at www.workforce.nhs.scot.

RETIREMENT OPTIONS

The options available are:

- ❖ Resign and retire from the NHS, returning to a role within the NHS
- ❖ Partially retire and access part of your SPPA pension
- ❖ Resign and retire completely from the NHS

RETIRE AND RETURN

When you request to retire and return, you must complete the **Retire and Return application form**. You also need to give your manager written notification of resignation from your current post. The application form is available at <https://workforce.nhs.scot/supporting-documents/form/retirement-policy-retire-and-return-application-form/>

Applications should be reviewed at Service Manager level or above, taking into account service needs as well as wider workforce implications and plans. For Medical and Dental staff, approaches should be made in the first instance to the Clinical Director.

Retire and return options are:

- ❖ return to their current post
- ❖ return to another post within the same job family
- ❖ apply for another post within a different job family
- ❖ retire and undertake shifts on the staff bank

In most circumstances, employees will request to retire and return part-time. However, employees can request to return full-time.

Your request to retire and return should be supported where possible. Your manager should only refuse a request for sound service or organisational reasons. Full details of what should be considered are contained in the Retirement Policy and supporting manager guide.

If the manager supports the request, they should update eESS at the time of approval.

Employees must have a minimum of a 24 hour break in service. Any outstanding annual leave must be taken before the break in service can commence. Outstanding annual leave will only be paid in exceptional circumstances.

PARTIAL RETIREMENT

This option allows employees who are members of the NHS pension scheme to claim some or all of their pension without leaving their job or having a break in service.

Members of the NHS Pension scheme who wish to take partial retirement will need to agree a new working arrangement with their employer that lets them reduce their pensionable pay by at least 10% for a minimum of 12 months.

What does a 10% reduction in pensionable pay mean?

Pensionable pay is broadly made up of basic pay, unsocial hours enhancements, all hours worked up to full-time. It does not include expenses or overtime.

An example of a 10% reduction in pensionable pay would be where an employee who works 30 hours per week from 9am-3pm Monday to Friday, reduces their hours to 27 hours per week.

You should be mindful of any future changes that could breach the 10% reduction threshold. For example, an employee has reduced their weekly contracted hours, however change working pattern which includes more unsocial hours. Unsocial hours enhancements are pensionable, therefore pensionable earnings increases. This could impact on the pension being received.

The exceptions to this are short-term fluctuations in shift allowances or nationally agreed pay awards.

What steps need to be taken to apply for this?

You should complete a flexible working request application form. The form is available at: <https://workforce.nhs.scot/supporting-documents/form/flexible-work-location-and-flexible-work-pattern-policies-flexible-working-request-form/>

Applications should be reviewed at Service Manager level or above within the timescales set out in the Flexible Work Pattern Policy in the usual way, taking into account service needs as well as wider workforce implications and plans. For Medical and Dental staff, approaches should be made in the first instance to the Clinical Director.

If your manager is able to support the request, they should liaise with the Payroll Department before final approval is given to ensure it meets the required reduction in pensionable earnings.

Payroll can be contacted by email: epayroll.lanarkshire@lanarkshire.scot.nhs.uk

Once Payroll have confirmed that the request will meet the financial requirements of partial retirement, the manager can complete the flexible work pattern request and update eESS with the change.

RETIREMENT AND NO REQUEST TO RETURN

When you notify your manager of your decision to retire, you must submit it in writing, providing the required notice as per your contract. You should also give sufficient time to plan for a phased retirement, any replacement for your role and the processing of your pension application.

Your manager should process the retirement termination of employment on eESS at the time, taking into account discussions on annual leave up to your retiral date.

Payroll will not process SPPA retirement forms until the eESS transaction is authorised.

PHASED RETIREMENT

All employees are entitled to one period of phased retirement. You should give your manager a minimum of 6 months notice of your intention to retire in order to qualify for this.

This can be taken in the lead up to the retirement date, or if applicable, as part of the retire and return agreement.

You will be entitled to reduce your working week by the following amount:

- ❖ third month before retiral – 20% of contracted hours
- ❖ second month before retiral – 40% of contracted hours
- ❖ last month before retiral – 60% of contracted hours

You will receive your salary during this time as if you are at work on your regular shift pattern, including on-call payments. You will also retain your annual leave entitlement at your contracted hours during the phased retirement.

Your manager should make sure that all annual leave is taken preferably before the start of the phased retirement, but no later than date of retirement. If you have any leave outstanding before commencing phased retirement, you will only be required to take leave for the days you should be working.

During a phased retirement, you cannot work additional hours in your substantive post or undertake Bank shifts during your regular shift pattern.

You and your manager should discuss and agree your working arrangements during the phased retirement period. For example, what days you will work, and what aspects of your post you will continue with during your phased retirement.

PRE-RETIREMENT COURSES

The 'Planning for a Positive Retirement' course is available to anyone who is within 12-18 months of retirement.

These can be booked via the Learnpro Course Booking System.

If you would like more information please contact:

LearningandOD@lanarkshire.scot.nhs.uk

How is the pension application form accessed?

The retirement application form NHS:RET – is a general form which applies to all employees employed by NHS Lanarkshire. The form can be accessed here: <https://pensions.gov.scot/nhs/nhs-forms>

The current form should be accessed in the NHS forms section of the SPPA website. Please note that SPPA will not accept out of date forms.

Who needs to complete the form and when?

You should complete the cover page and part 1 of the form. A scanned copy of the form should then be sent to the Payroll Department by email: epayroll.lanarkshire@lanarkshire.scot.nhs.uk or by post to Payroll Department, Kirklands HQ, Fallside Road, Bothwell, G71 8BB. Payroll will complete Part 2 and send the form on to SPPA.

In order to meet SPPA processing requirements, the form must be sent to Payroll at least 6 months before the retirement date to ensure it is processed in time. Any forms that are received after this time may not be processed before your retirement date and this may affect when your pension payments commence.

To enable Payroll to complete the employer section of the form, your manager needs to complete the eESS transaction terminating or changing your contract. Payroll will not process the retirement form until eESS has been updated.

Where can I get more information about my pension?

Any queries relating to SPPA pension need to be directed to the pension provider, SPPA.

The SPPA website <https://pensions.gov.scot/> provides information on the scheme.

Any specific queries can be answered by email: sppacontactus@gov.scot or phone: 01896 893000

SPPA also have an online members service – MY PENSION.

To register you will need your NI Number and Superannuation Number. It is advisable to register using a personal email address, so that employees can continue to use this once they retire.

This service allows you to:

- ❖ Contact SPPA direct
- ❖ View & print your pension benefit statements

This can be accessed here: <https://mypension.sppa.gov.uk/Login.aspx?ReturnUrl=%2f>

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