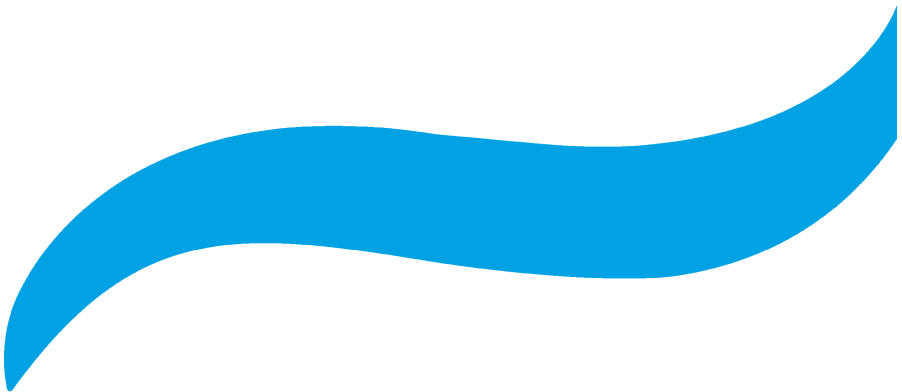


Retirement Guide for Managers



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 their SPPA pension
- ❖ Resign and retire completely from the NHS

RETIRE AND RETURN

When an employee requests to retire and return, they must complete the Retire and Return application form. They also need to give you written notification of resignation from their 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.

An employee's request to retire and return should be supported where possible. You 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 you support the request, you 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.

Employees 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 changes their 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?

Employees 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 you are able to support the request, you 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, you can complete the flexible work pattern request and update eESS with the change.

RETIREMENT AND NO REQUEST TO RETURN

When an employee notifies you of their decision to retire, they must submit it in writing, providing the required notice as per their contract. They should also give sufficient time to plan for a phased retirement, any replacement for their post and the processing of their pension application.

You should process the retirement termination of employment on eESS at the time, taking into account discussions on annual leave up to the employee's 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 and should give you a minimum of 6 months notice of their 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.

The employee will be entitled to reduce their 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

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

You 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 the employee has any leave outstanding before commencing phased retirement, they will only be required to take leave for the days they should be working.

Employees on a phased retirement cannot work additional hours in their substantive post or undertake Bank shifts during their regular shift pattern.

You and your employee should discuss and agree the employee's working arrangements during the phased retirement period. For example, what days will the employee work, and what aspects of their post will they continue with during their phased retirement.

PRE-RETIREMENT COURSES

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

These can be booked via the Learnpro Course Booking System.

If your employee wishes more information, they should 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?

The cover page and part 1 of the form is completed by the employee. 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 the employee's retirement date and this may affect when their pension payments commence.

To enable Payroll to complete the employer section of the form, you need to complete the eESS transaction terminating or changing the employee's contract. Payroll will not process the retirement form until eESS has been updated.

Where can employees get more information about their 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 which allows employees to contact SPPA directly, and view & print their pension benefit statements so that they can continue to use this once they retire.

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

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