

## EMPLOYEE GUIDE TO RETIREMENT AND RETURN TO WORK

This guidance and flowchart has been developed to support employees within the Trust who are considering retiring from employment or considering other options such as wind-down, step-down or retire and return. Each individual case may vary so it is advisable before finalising any retirement arrangements to seek advice. All employees who are part of the NHS Pension Scheme are strongly encouraged to read the NHS Pensions Retirement Guide. You can locate the guide using the following link, or alternatively by searching in google.

[NHS Pensions Retirement Guide 2023 \(nhsbsa.nhs.uk\)](https://nhsbsa.nhs.uk)

It is an extremely important decision to make and therefore, ensuring that you have obtained all of the relevant pension information in advance will help you to ensure you are fully informed before taking any action.

The Trust's Pension team is also available for advice, guidance and support. Additional information is available on the Trust's intranet site. Please see the link below;

[Pensions](#)

For advice regarding your employment, contractual notice periods and options available to you can also be found in the Trusts Retirement Procedure. Please see the link below;

[RetirementProcedure.pdf](#)

It is important that any intentions on retiring are discussed with your line manager in the first instance. In particular if you are considering requesting to return to work following retirement. Your line manager can go through the options with you.

In the first instance, you must decide if you are retiring fully or if you wish to return following retirement.

- **Intention on taking full retirement** – you must follow the normal resignation process by confirming your last date of employment with the Trust to your line manager ensuring that the appropriate contractual notice is given as a minimum. Please note, NHS Pensions require a minimum of three month's notice in order to make the necessary arrangements for the release of your Pension.
- **Intention on taking retirement, but wish to return to work following a short break** – you must follow the process as set out in the flowchart below.
- **Intention on taking Ill-Health Retirement** – please seek advice from the Human Resources team in the first instance. They can be contacted on 01213717612, or alternatively, please email [firstcontact@uhb.nhs.uk](mailto:firstcontact@uhb.nhs.uk). The HR team will go through the process with you.
- **Alternative Flexible Retirement Options** – please see the Trust's Retirement procedure for alternative options, such as 'wind-down' and 'step-down'. [RetirementProcedure.pdf](#)

## Retire and Return – Flowchart

This process applies where an employee wishes to retire and return to work following a short break. In this instance, the employee is resigning to take their pension with no automatic right to return to either their original role or another role with the Trust.

The below flowchart sets out the steps a member of staff must take when intending on requesting to return to work following retirement. It is recommended that your retirement date falls on the last day of the calendar month to ensure a smooth process in your return to the trust.

### Step 1

- If a member of staff is intending on requesting a return to work following retirement, they should notify their line manager of their intended request at least six months in advance of the planned retirement date by completing the Flexible Retirement Application form and submit this to their line manager, setting out their proposed option;
- a) wishing to return to a new employment contract to the same role on existing or reduced hours
- b) wishing to return on a new employment contract to a new role or to work on the bank - if wishing to return to a new role, the member of staff must formally apply for vacancies through the normal recruitment process.
- **Please note: Staff must have satisfactory attendance and performance at the time they wish to retire and return and not be subject to any formal sickness at Stage 2 or above, live performance or disciplinary action. For further advice please speak to the Human Resources team.**

### Step 2

- Upon receipt of the written request, the line manager must acknowledge the request in writing within five working days.
- The line manager must consider the request and meet with the member of staff as soon as possible, but no later than 14 calendar days from receipt of the written request.
- **Please note: Staff must have a break of at least 24 hours between retiring and returning to work.**
- Once a decision is reached, the line manager must confirm the outcome in writing within 5 working days following the meeting.
- If you return to work in the same month you retire you will lose all system access and have to set everything up as a brand new starter would joining for the first time. Example, retire 7th August return 14th August, setup from scratch with new employee number.
- If you return to work in the month after you retire then your system access will remain. Example, retire 7th August return 1st September, system access retained.
- If you return to work in the month after you retire then your system access will remain. Example 1, retire 7th August return 1st September. Example 2, retire 30th August return 1st September, system access retained.

### Step 3

- The Recruitment Team will be required to ensure appropriate HR documentation is submitted to the Payroll team in a timely manner. Please see the flowchart for Line Managers.
- Recruitment Team will complete pre-employment checks as appropriate for the job role if a person is returning after a break of more than 3 calendar months
- After a month of more than one calendar month, a DBS check will be undertaken at a level appropriate to the job role
- Recruitment will issue a new contract which reflects the newly agreed terms and conditions of employment.