MANAGER'S GUIDE TO THE RETIRE AND RETURN PROCESS

This guidance and subsequent flowchart has been developed to support line managers within the Trust in dealing with retirement of their staff. This document supports the retirement and return to work process for medical and non-medical staff across the Trust. Recruitment in this document refers to the Medical and Non-Medical Recruitment Teams and Managers will inform the appropriate Team dependent on the staff leaving with Medical Recruitment covering medics and Recruitment covering non-medical staff.

When a member of staff is considering retiring, this will be an important decision for them to make. Therefore, line managers are pivotal in ensuring that staff receive the appropriate support in considering their retirement options. The line manager is not expected to provide advice and guidance on pensions but should familiarise themselves with the retirement options available to staff within the Trust's Retirement procedure and the appropriate processes to follow. This will enable Line Managers to guide their staff through the process and ensure their retirement from employment is seamless. Line Managers must also be familiar with the resources available to staff in order to be able to sign post them appropriately.

All members of staff who are part of the NHS Pension Scheme are strongly encouraged to read the NHS Pensions Retirement Guide. They can locate the guide using the following link, or alternatively by searching in google.

NHS Pensions Retirement Guide 2023 (nhsbsa.nhs.uk)

It is an extremely important decision to make and therefore, ensuring that they have obtained all of the relevant pension information in advance will help them to ensure they 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

Advice regarding their employment, contractual notice periods and available options is set out in the Trust's Retirement Procedure. Please see the link below;

RetirementProcedure.pdf

Staff are strongly encouraged to discuss their intentions to retire with their line manager in the first instance. In particular if they are considering returning to work following retirement.

In the first instance, the member of staff must decide if they are retiring fully or if they wish to request a return following retirement.

- **Intention on taking full retirement** – staff must follow the normal resignation process by confirming their last date of employment with the Trust ensuring that the appropriate contractual notice is given as a minimum. Please note, NHS Pensions require a minimum of three months' notice in order to make the necessary arrangements for the release of their Pension.

- **Intention on taking retirement, but wish to return to work following a short break** – Within the Retirement Procedure there are a number of options available for staff who wish to ease into retirement such as wind down, step down or retire and return. The flow chart outlines the process as set out in the flowchart.
- **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.

Retire and Return - Flowchart

This is where a member of staff retires, takes all of their pension benefits and then returns to work in the NHS after a short break. In this instance, the member of staff is resigning to take their pension with no automatic right to return to either their original role or another role with the Trust.

This is a helpful guide for Line Managers to follow when processing a member of staff who is returning following retirement.

Please note*: To enable a staff member to retain system access upon returning to work, staff would need to return to work at the start of the next pay period. E.g. Retire on 7th of the month, earliest return to work date would be 1st of the next month. Benefits to doing so are; retain email accounts and trust logins, staff to retain payslip and P60 data etc.*

If staff return to work in the same month they retire, they 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 staff return to work in the month after they retire then their system access will remain. Example 1, retire 7th August return 1st September

Example 2, retire 30th August return 1st September, system access retained.

1st Step

- It is recommended that 6 months in advance of their intended retirment date, member of staff discusses option to return with their Manager who then requests approval/funding for a vacancy if the option is available.
- Member of staff wishing to terminate their contract of employment, gives formal notice in writing to their Line Manager
- Manager ascertains if member of staff is returning on a new employment contract to the same role on existing or reduced hours OR
- Member of staff is returning on a new employment contract to a new role or to work on the bank

Next Steps

- For a new role, member of staff will need to apply via NHS Jobs/Oleoo and follow a competitive recruitment process
- Member of staff must have a break of at least 24 hours between retirng and returning to work
- Managers to notify Recruitment of employees intention of returning to work to enable the following:
- *ESR Applicant assigned to Previous employee record*
- *Security, IT, Learning and Development to be notified of staff who need to retain trust system access*

Next Steps

- Line Manager completes HR3/ESR3 to notify payroll of the retirement
- Recruitment/Payroll completes HR1/ESR 1 New Starter Form with the relevant EVAS/WAF attached for re-engagement
- ESR Applicant added to the ex-employee record.
- New assignment on ESR is created
- Recruitment notifies IT / ID/Security to maintain system acess for the member of staff and ensure uninterrupted
- To help facilitate the system access, the ESR record will need to be retained.

Next Steps

- Recruitment will complete pre-employement checks as appropriate for the job role if a person is returning after a break of more than 3 calendar months
- After a break 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 agreed terms of service