



Retirement Planning and Administration Policy

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Lead of Review
Group

Reviewer:

GAPF Policies
Subgroup

Approver:

Grampian Area
Partnership Forum
(GAPF)

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The provisions of this policy, which was developed by a partnership group on behalf of Grampian Area Partnership Forum, apply equally to all employees of NHS Grampian except where specific inclusions have been identified.

NHS Grampian
Retirement Planning and Administration Policy

This document is also available in large print and other formats and languages on request. Please call NHS Grampian Corporate Communications on Aberdeen (01224) 551116 or (01224) 552245.

This Policy has undergone Equality and Diversity Impact Assessment.

Revision History:

Document Title	Policy Version	Date approved by GAPF	Review Date
Retirement Planning and Administration Policy	6	May 2022 - Review date amended given the policy is part of the Once for Scotland Phase II work.	31 December 2023
Retirement Planning and Administration Policy	7	Inclusion of Retire and Return arrangements – approved by GAPF at 16 March 2023 meeting	31 December 2023

NHS Grampian Retirement Planning and Administration Policy

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NHS Grampian

Retirement Planning and Administration Policy

1 Introduction

- 1.1 NHS Grampian recognise that the change from work to retirement can be one of the more significant events encountered during a person's life and has implemented this policy in order to provide employees with practical information about retirement.

2 Purpose

- 2.1 This policy aims to give information to employees who are planning to retire and to managers, in order that they can assist in the process. An explanation is given of the procedure which should be followed and the timescales involved in applying for (a) phased retiral for which 6 months notice is required and (b) a National Health Service Superannuation Pension which requires 5 months notice. Managers and staff should ensure that this timescale is taken into consideration when retirement planning.
- 2.2 At the end of an employee's career, NHS Grampian aims to ensure the retirement process is as smooth and effective as possible. The policy also gives details about the Grampian NHS Retirement Fellowship and the Pre-Retirement Course.
- 2.3 Provides information on the interim arrangements for Retire and Return.

3 Retirement

- 3.1 This policy applies to all employees who choose to retire from NHS Grampian.
- 3.2 When an employee wishes to retire the responsibility lies with that individual to advise NHS Grampian of their intentions. If the employee is a member of the NHS Scotland Superannuation Scheme they must do this within the timescale required for processing their pension application i.e. by 5 months of their planned retirement date. This is to try and ensure that there is no gap between final salary payments and first pension payment. See section 7.2 for Retire and Return arrangements.
- 3.3 Information for the normal retirement age (NRA) and minimum retirement age (MRA) is detailed in Appendix 1. Further pension details

are available from the Scottish Public Pensions Agency, 7 Tweedside Park, Tweedbank, Galashiels TD1 3TE, Tel. 01896 893000, www.sppa.gov.uk.

4 Procedure

- 4.1 When the employee confirms, in writing, that they wish to retire on a given date, their line/clinical manager will immediately complete a Notification of Termination form, indicating the retirement date and send this to the Payroll Team. An employee must retire from all superannuable employments in order to receive their retirement benefits, therefore an employee with multiple employments within NHS Grampian must follow this procedure for each separate contract. See section 7.2 for Retire and Return arrangements.
- 4.2 Employees, excluding Bank workers, who wish to take advantage of the phased retiral facility (see section 5 below) must give their manager notice of at least 6 months prior to their retirement date and state that they wish to utilise the phased option. In exceptional circumstances where the notice period is less than 6 months the policy may be applied with mutual agreement between employer and employee.
- 4.3 If the employee is a member of the NHS Superannuation Scheme the Notification of Termination form must be submitted at least 5 months prior to the retirement date to ensure the employee receives the appropriate retirement application form from the Payroll Team, that is completed by both the employee and the employer and then sent to the Scottish Public Pensions Agency (SPPA) for calculation and processing of retirement benefits.
- 4.4 Assistance in completing this SPPA form can be obtained from your Payroll point of contact or the Operational HR Team on extension 52888 or gram.hr@nhs.scot.

5 Phased Retirement

- 5.1 An employee, excluding Bank workers, has the option to utilise phased retirement when their intention to retire is communicated in the following circumstances:
 - From the minimum retirement age of 50, if a member of the 1995 section of the NHS Superannuation Scheme
 - From the minimum retirement age of 55, if a member of the 2008 section of the NHS Superannuation Scheme
 - From the minimum retirement age of 55, if a member of the 2015 section of the NHS Superannuation Scheme
 - If not a member of the NHS Superannuation Scheme from age 50

- 5.2 In order that an employee can adjust to the prospect of increased leisure hours, the following gradual reduction in working hours will be offered three months prior to retirement for staff:
- Third month before retirement – normal hours reduce by 20%
 - Second month before retirement – normal hours reduce by 40%
 - Last month before retirement – normal hours reduce by 60%
- 5.3 For employees whose normal working hours is spread equally over 5 days per week the gradual reduction in working hours introduced three months prior to retirement would be:
- Third month before retirement – normal hours reduce to 4 days per week
 - Second month before retirement – normal hours reduce to 3 days per week
 - Last month before retirement – normal hours reduce to 2 days per week
- 5.4 For employees whose normal working hours is not spread equally over 5 days per week e.g. part time staff and certain shift workers, the gradual reduction in working hours to be introduced three months prior to retirement is the percentage reduction outlined in 5.2 above.
- 5.5 The employee will receive full pay during this time based on the rota they would normally have worked if they were not on phased retirement i.e. paid the unsocial hours, on call and call outs.
- 5.6 Full contractual annual leave and public holiday entitlement is retained and must be taken before retirement date. If annual leave or public holiday entitlement is taken during the phased retirement period, the number of annual leave days or hours required is for example – Second month before retirement – normal hours reduced to 3 days per week therefore to have the whole week off, 3 days of annual leave would require to be taken.
- 5.7 Employees who wish to take advantage of phased retirement must give their manager notice of at least 6 months prior to their retirement date. In exceptional circumstances where the notice period is less than 6 months the policy may be applied with mutual agreement between employer and employee. The manager and the employee should then discuss and agree the employee's working arrangements during the phased retirement period including which days the employee will work and the allocation of any outstanding annual leave. This must take account of the needs of the service.

- 5.8 In addition, it should be noted that the pattern of reduced hours can only be permitted on the basis shown above i.e. the paid time off cannot be aggregated and spread over a longer or shorter period.
- 5.9 The right to reduced hours during the last three months of service will not apply to employees taking early retirement on the grounds of ill health or as a result of organisational change/redundancy and Partial Retirement etc.
- 5.10 Employees who have previously retired from NHS Grampian utilising the phased retirement option, will not be entitled to take this option again.

6 Additional Information

- 6.1 The People & Culture Directorate runs Pre-Retirement courses which are advertised throughout NHS Grampian. These courses are to assist employees with the transition from employment to retirement. Employees are encouraged to attend such a course.
- 6.2 Further information on these courses can be obtained by contacting the Learning and Development Department and it is recommended that employees attend such a course two years before retirement.
- 6.3 Employees will be given paid leave to attend a pre-retirement course organised by NHS Grampian.
- 6.4 The NHS Retirement Fellowship exists for retired employees and details of this are given in Appendix 2.
- 6.5 Employees may contact the HR Operational Team to discuss the application of any aspect of this policy.
- 6.6 To encourage long and healthy retiral employees may self refer to the Occupational Health Service for advice.

7 Returning to work following retiral

- 7.1 If an employee is considering any return to work options following receipt of their SPPA retirement benefits they are advised to check the implications of this on the benefits already in payment with SPPA.

- 7.2 In order to implement DL(2022)30 NHS Scotland National Interim Arrangement on Retire and Return, internal processes have been devised, outlined in Appendix 3
- 7.3 When an employee has retired from NHS Grampian their contract of employment will be terminated. If they wish to return to NHS employment the employee will be required to apply for an advertised position.
- 7.4 Employees who have previously retired from NHS Grampian utilising the phased retirement option, will not be entitled to take this option again.

Information for the normal retirement age (NRA) and minimum retirement age (MRA)

Members of the 1995 section of the NHS Superannuation Scheme

The Normal Retirement Age (NRA) is age 60. Scheme members who have Mental Health Officer or Special Class Status have a NRA of age 55 and are therefore eligible to retire at this time.

The Minimum Retirement Age (MRA) is age 50 and scheme members may choose to take Voluntary Early Retirement and receive reduced benefits. For scheme members of the 1995 section who first joined the Scheme after 6 April 2006 and for some who returned to the Scheme after 6 April 2006 this will change from age 50 to age 55.

The MRA for Premature Retirement due to Redundancy or Efficiency of the Service is age 50, or age 55 as per above.

Members of the 2008 section of the NHS Superannuation Scheme

The NRA is age 65.

The MRA is age 55 and at this point in time scheme members can choose to take Voluntary Early Retirement and receive reduced benefits.

The MRA for Premature Retirement due to Redundancy or Efficiency of the Service is age 55.

Scheme members may also take Partial Retirement from age 55 onwards if their pensionable pay reduces by 10% and remains so for at least one year. Benefits payable will be reduced where payable before age 65.

Members of the 2015 section of the NHS Superannuation Scheme

The Normal Retirement Age (NRA) is equal to the scheme member's State Pension Age. A calculator to work out when an individual's State Pension Age is can be accessed at www.gov.uk/calculate-state-pension

Further pension details are available from the Scottish Public Pensions Agency, 7 Tweedside Park, Tweedbank, Galashiels TD1 3TE, Tel. 01896 893000, www.sppa.gov.uk.

NHS Retirement Fellowship Information

Type of organisation: Registered Charity No. 287936

Headquarters: Central Office
Forston Clinic
Charminster
Dorchester
Dorset
DT2 9TB
Tel 01305 361317
Fax 01305 361322

Client Groups:

NHS retirees and spouses
People from organisations connected to NHS
People with no NHS background may join but only with agreement of local Branch Committee

Background Information:

The Retirement Fellowship was formed in 1978. It is a Registered Charity with the Charity Commission in England and Wales.

It was felt that the 'caring' vocation exercised by all disciplines during their work should not be allowed to disappear in retirement. Additionally, many felt that the fund of expertise this body of former workers possessed, could, and should be heard locally and nationally in the many activities and organisations concerned with retirees. We do not have a political, racial, religious or other discriminatory overtones, and offer social and cultural activities, outings, and provide a visiting service to lonely, sick and housebound among our members.

There is a National Committee in London made up of representatives from the English regions, Scotland, Wales and Northern Ireland. The Committee exists as a channel for information, assistance in Branch formation, liaison with other national retirees or Senior Citizen Organisations, and the organisation of the Annual Conference.

The Annual Conference, usually held at the beginning of July, is also the Annual General Meeting to which all Branches are invited, and at which reports are made, and officers are elected.

In Scotland there is a Federation of Scottish Branches. Meetings are held three times a year in Perth, at which Scottish and national concerns are discussed. An annual May Gathering of Scottish members is held at the Dewar Centre, Perth.

Aims

To promote companionship and fitness of retired workers
To be able to have a voice to be heard on issues for older people both locally and nationally.
To help members with financial difficulties. Application to Benevolent Fund.

Services/Activities

Meetings include talks from invited speakers, entertainment, lunch and bus outings. Some branches have swimming or walking group and other activities.

NHS Retirement Fellowship (Aberdeen Branch)

The Aberdeen Branch of the Fellowship is the oldest established branch in Scotland and has an active and progressive membership. The first Meeting was held in October 1980.

Branch meetings are held in the Aberdeen Medico-Chirurgical Society Hall, Medical School, Foresterhill, Aberdeen AB25 2ZD, from 1.30pm to 3.30pm on the second Monday of each month. There are no meetings during June, July and August.

The Programme includes talks from a variety of invited speakers. Refreshments are served prior to the commencement of the Meeting. Social events include visits to places of interest in the Aberdeen area, a Burns lunch, lunch in October and a Christmas lunch. Bus outings are arranged for June and September.

Current annual subscription is £15.00 due in April. (correct as of October 2016)

Clients.

NHS/Social Service employees (employees being medical staff, nurses, physiotherapists, speech therapists, occupational therapists, pharmacy staff, X-ray department staff, admin staff, portering and domestics staff to name a few) about to retire and spouses are eligible to join. People from organisations connected to NHS e.g. the Blood Transfusion Service and the Scottish Ambulance Service are also eligible to join.

If you wish to join, please contact the People & Culture Directorate, for an application to be sent to you, at:

NHS Grampian
Operational Team
People & Culture Directorate
Westholme
Woodend Hospital
Queens Road
Aberdeen
AB15 6LS
Telephone number 01224 552888 or gram.hr@nhs.scot.

We look forward to welcoming you.

NHS Retirement Fellowship (Moray Branch)

Have you retired from any branch of the National Health Service, or from any organisation connected to the NHS e.g. working within Health and Social Care Services and employed jointly with the Council and NHS. If so, please contact the Branch Secretary.

The Moray Branch of the Fellowship was established in November 1981 and has an active and progressive membership. We have an enthusiastic committee who would welcome new members.

Branch meetings are held in the Elgin Youth Cafe, Francis Place, Elgin from 2.00pm – 4pm on the second Wednesday of each month except July and August.

At Branch meetings we have talks by various invited speakers and afternoons of entertainment by musicians or demonstration and participation in reflexology etc, after which we have light refreshments. We also organise outings twice yearly to places of interest usually following by a delicious High Tea and a good blether.

Partners of retirees are also welcome as members and our current subscription is £10.00 per annum. (correct as of October 2016)

More information is available from the Branch Secretary, Mrs Val Thatcher, St Margaret's, 4 Duke Street, Fochabers, Moray IV32 7DN Tel: 01343 823919.

If you wish to join, please contact the People & Culture Directorate, for an application to be sent to you:

NHS Grampian
Operational Team
People & Culture Directorate
Westholme
Woodend Hospital
Queens Road
Aberdeen
AB15 6LS
Telephone number 01224 552888 or gram.hr@nhs.scot.

We look forward to welcoming you.

Interim arrangements for Retire and Return

1. Background

The national interim arrangement on Retire and Return was issued pending the review of the Retirement Policy by the Once for Scotland Workforce Policy Review Programme. The arrangement will be formally incorporated into the Retirement Policy in the Supporting the Work-life Balance suite of policies anticipated to be published in 2023.

The arrangement supports retiring employees by offering an accelerated process to return after retiring and claiming pension benefits. An employee must return on a part time basis and can return to either:

- Their own role or
- in a different role in the same job family without the need for a recruitment process;
- A bank post or
- A role in a different job family through normal recruitment processes.

This is subject to an approval process by the organisation. Individuals are also strongly encouraged to obtain appropriate information from the Scottish Public Pensions Agency (SPPA) on any pension related restrictions that apply to them, on the hours they work or when they can return and seek independent financial advice.

NHS Grampian has created local processes to implement the policy to ensure appropriate scrutiny and governance.

NHS Grampian will work with the BMA JNC to agree the most appropriate way for Medical and Dental Consultants to be re-employed in the service. The national arrangements outlines that associate specialists will be re-employed on a locum Consultant basis.

2. General Points

2.1 Termination of substantive role contract/no guarantee of a post to return to

An employee submits their resignation/retirement at the beginning of the process at the same time as submitting an application to return (appendix A – national application form adapted for NHS Grampian use). The resignation/retirement proceeds irrespective if a return post is obtained.

Although an application to return following retirement may be approved there is no guarantee of a new part time role through the following routes:

- in a different role in the same job family without the need for a recruitment process;
- A bank post or
- A role in a different job family through normal recruitment processes.

If returning to their role, the application would only be approved if this was possible.

If an employee subsequently wishes to retract their resignation/retirement e.g. after a return to their own role is not approved, and this is accepted then an immediate action is for the HR Service Centre to be informed so the SPPA can be notified to cease the processing of any retirement benefits.

2.2 Level of manager approving

The application to Retire and Return must be approved by the manager and reviewed by a senior manager. The manager is defined as the line manager and the senior manager is at minimum Head of Service. Examples being Partnership Manager or Divisional General Manager, a role that has long term planning responsibilities, aware of redesign and other strategic developments and oversight of any upcoming changes effecting the department.

2.3 Return to a fixed term contract

The DL provides information about break in service between retirement and return, outlining that where there is a break of more than one week (measured Sunday to Saturday) continuity of employment will be broken. In situations when the employee is returning to a fixed term contract there must be an end to the existing permanent contract, achieved through a break in service. This would comply with the NHS Grampian [Fixed Term Contract Policy](#).

3. Return to current role on part time basis (Option A in flowchart)

When considering an application, the manager must assess the needs of the post and the service. This should include potential barriers such as:

- Any planned service redesign
- The availability of posts to support redeployment. Refer to the Redeployment Policy
- The need for the post to be full-time or the requirement for on-call

The interpretation of the second bullet point is that given it is the employees current post, the part time hours post they are returning to will not first be submitted for consideration for those on the redeployment register.

An already part time employee retiring does not have to return to less hours, they could return to the same, less or more hours but not full time.

Subsequent to approval the steps taken would be:

- Ensure current post(s) is terminated in eESS Manager Self Service, noting retirement. This must be done as quickly as possible, ideally 4-5 months in advance, to ensure any required retirement benefit application is made available to the employee and subsequently processed by the HR Service Centre and sent to SPPA in sufficient time. It is essential that this occurs as it is an audit requirement that the current post is physically terminated by the manager in eESS Manager Self Service.
- Letter (appendix B) is sent to the employee, from their manager, confirming the arrangements for their return under the Retire and Return arrangements. Letter would confirm the agreed return details (as documented on the Retire and Return application e.g. whether fixed term contract or permanent, hours of work etc)
- As it is a return to the same post, the post does not need to be approved through the vacancy management process and will then as a consequence not be in JobTrain.
- Staff Engagement Form (electronic version on the HR Service Centre intranet page) completed for return. Note on the Staff Engagement Form that it is a Retire and Return.

- Staff Engagement Form, Retire and Return application (which replaces the recruitment pack) and letter is emailed to eESS (gram.eess@nhs.scot) for input
- Subsequently the individual will be issued with a new payroll number and contract of employment

Checks such as Protecting Vulnerable Groups (PVG) will not be required as the employee would have remained a member of the PVG scheme.

If the manager wishes to recruit to any remaining hours the normal recruitment process should be followed commencing with approval through the vacancy management process.

4. Return to a different role in the same job family (Option B in flowchart)

The DL does not detail a sufficient process as to how this can be achieved but does outline the following key aspects:

- A returner can apply for a post in the same job family either at a different grade or elsewhere in the service.
- The employee should approach their manager to see if there is a suitable vacancy to match their skills and experience. If so, their application for the vacancy should be considered before others. For example, a retired physiotherapy team leader returning to a band 5 physiotherapist post.
- Re-employment into the same job family will not require the usual recruitment process for appointment to a part-time post. Not all posts in the same job family are managed by one manager nor perhaps the line manager of the individual

To enact the above the following has been agreed:

4.1 Accessible to all employees

A process that is fair and accessible to all employees.

4.2 Different pay band/grade

Although the DL states “A returner can apply for a post in the same job family either at a different grade or elsewhere in the service” it has been agreed that this should be at the same or lower pay band/grade only. The returner should not receive promotion through the Retire and Return process as re-employment into the same job family will not require the usual recruitment process for appointment to a part-time post.

4.3 Hours

An already part time employee retiring does not have to return to less hours, they could return to the same, less or more hours but not full time.

4.4 Definition of a service

Definition of “service” in this context is the whole organisation i.e. NHS Grampian. Other considerations were in the department of the manager or within the area of the senior manager approving the application e.g. a directorate, portfolio.

4.5 Considered before others

Agreed as before others who may have applied for the post if advertised but not those on the redeployment register due to health, organisational change etc.

4.6 Will not require the usual recruitment process

This has been agreed as no interview however there should be a discussion with the appointing manager and depending on the role PVG and pre-employment health screening may now be necessary. The example outlined in the interim arrangement of physiotherapy team leader returning to a band 5 physiotherapist post may require health screening as returning to a hands on post. In this example a conditional offer therefore may be required.

4.7 Role of the line manager

- Ensure the application form is fully completed and endorsed by senior manager
- Submit Retire and Return application to the Redeployment Co-ordinator in order for the employee to be placed on the Retire and Return Register (see 4.9)
- Ensure current post(s) is terminated in eESS Manager Self Service, noting retirement. This must be done as quickly as possible, ideally 4-5 months in advance, to ensure any required retirement benefit application is made available to the employee and subsequently processed by the HR Service Centre and sent to SPPA in sufficient time. It is essential that this occurs as it is an audit requirement that the current post is physically terminated by the manager in eESS Manager Self Service.

4.8 Process for a vacant post

Vacant post follows normal process of:

- Ensure that the job description, if it is a new role or an existing role that has been changed, has been through the job evaluation process to confirm a band.
- Approved through vacancy management process which leads to the post in JobTrain as need governance that the post is authorised to be recruited to and funded.
- Assessed against those employees on the redeployment register for reasons of health, organisational change etc – post may be appointed to at this stage
- Only if not appointed to through the redeployment register consideration against the Retire and Return applications
- Post assessed against those employees who have indicated a wish to return to a post in their same job family after retirement - post may be appointed to at this stage. The contract will normally be made on a permanent basis unless the post would have been advertised as fixed-term contract, had it not been filled by the returner.
- If not appointed to proceed to advert.

4.9 Retire and Return register and matching process

For those employees who want to Retire and Return in a different role in the same job family, their details will be included on a Retire and Return register, with a process to match their return wishes to vacant posts.

The maximum period an employee will be on the register is until their retirement date. From that date they are no longer an employee so they would need to apply for posts through the normal recruitment process.

A register is in place to ensure accessibility to all, consistency and governance purposes. It will be operated on a similar basis to the current redeployment register. Any vacant post will first be considered for those on the redeployment register due to

organisational change, health etc, and if not appointed to through that route then consideration for those on the Retire and Return register. This complies with the DL principle of being considered before others as if the post can be appointed to from those retiring and returning, it will not be advertised.

Redeployment Co-ordinator then follows the process outlined below:

- Assesses the Retire and Return applications against the vacancies and determine if there is a match – post type, hours, skills and experience, with Staff Side
- Posts highlighted to the appropriate employee(s) to which they express an interest
- Does not require the usual recruitment process for appointment to a part-time post therefore a discussion is held with the appointing manager
- If an appointing manager does not consider the employee suitable for the role, robust rationale based on the person specification must be given
- Depending on the date the employee wishes to return an appointing manager may not be able to wait if filling the post ahead of the return date is service critical.
- Conditional offer may be necessary e.g. if PVG is required

4.10 Terminology

Reassure those retiring and returning that they are not being redeployed just because the Redeployment Co-ordinator is the role undertaking the matching process. The process should be managed centrally and it is appropriate for it to be undertaken by the Redeployment Co-ordinator.

5. Return to a Bank post (Option C in flowchart)

Subsequent to approval the normal process would be followed to join the bank. It should be noted that a bank worker opportunity may not exist for every job family and the routes to join the bank will differ i.e. not all banks are managed centrally.

6. Return to a part time role in a different job family (Option D in flowchart)

Subsequent to approval the employee would apply for advertised vacancies through normal recruitment processes.

7. Appeal process

The Appeal process outlined in the DL is noted and will be used as appropriate if a request to Retire and Return is refused for returning to current role on a part time basis. If not appointed to a different role in the same job family, bank post or role in a different job family the normal grievance process will be followed.

The above is summarised in a flowchart (appendix C).

Retire and Return Application Form

This form should be used to request Retire and Return on a part-time basis. Employees should read the NHS Scotland Interim National Arrangement on Retire and Return and NHS Grampian implementation process. It is important that you understand the terms of the arrangement before completing this form. If you are in any doubt about the implications of your request, you should discuss with your manager.

Part 1: To be completed by employee

Section 1: Personal details

Name:	
Job title:	
Grade / Band:	
Payroll number:	
Department:	
Location:	

Section 2: Present working arrangements

Please identify your current working arrangements:

Days of the week	
Start and finish times	
Total hours per week	

Section 3: Request to return after retirement

Type of return

Which category of return are you requesting (please tick the category that applies to you)

<input type="checkbox"/>	I would like to return on a part time basis to my current post
<input type="checkbox"/>	I would like to return on a part time basis to another post within the same job family.
<input type="checkbox"/>	I would like to return and undertake shifts on the staff bank
<input type="checkbox"/>	I would like to return on a part time basis to another post within a different job family

Working pattern requested

Days of the week	
Start and finish times	
Total hours per week	

Do you wish to be available on-call? Yes / No (delete as appropriate)

Section 4 – Additional information required if selected the category above - I would like to return on a part time basis to another post within the same job family.

Please state the grade or band below:

--

Qualifications, Skills and Experience

Please provide a brief list of qualifications:
Please provide a list of key knowledge, skills and experience:

Employment Options

Please list the type of posts you may be interested in, in order of preference:	
1	
2	
3	
4	

Section 5: Retirement date and return start date

Please give the date to would like to:

Retire on, inclusive of any outstanding annual leave	
Return on	

Section 6: Impact of new working pattern

If the request is to return to your current role please give details of how you think the requested work pattern will affect the department and/or service provided

--

How do you think this can be managed or resolved?

--

Section 7: Declaration

Please read the following statements and tick whichever box is appropriate:

<input type="checkbox"/>	I understand it is my responsibility to contact the Scottish Public Pensions Agency (SPPA) regarding the effect of this proposal on my pension benefits
<input type="checkbox"/>	I am not a member of the Superannuation Scheme

Employee's signature	
----------------------	--

Date	
------	--

Part 2: To be completed by manager

Please complete relevant section (A, B, C or D) based on the category of Retire and Return requested.

A. I would like to return on a part time basis to my current post

	(1) I support this request and the associated new working pattern.
--	---

You will retire on date, being inclusive of any outstanding annual leave) and commence re-employment on the following arrangement on (date)

Hours of work	
Days of work	
On call (Yes / No)	
Grade/Band	
Job title	
Location	

Or

	(1) Before I accept or reject this request I will need to establish if I can recruit to the remaining hours on a part time basis or job share.
--	---

I will start the recruitment process and let you know, within 3 months from the date of receipt of this application, the outcome of your request for retirement and reemployment on part time basis.

Or

	(2) I do not support this request for the following reasons:
--	---

Please state reasons below, or attach your written response to the applicant.

The post cannot be filled on a part time basis or job share for the following reasons:
--

B. I would like to return on a part time basis to another post in the same job family

Your application will be provided to the Redeployment Co-ordinator for your details to be included on a Retire and Return register to match your return wishes to vacant posts.

The maximum period of time on the register is until your retirement date of (date). From that date you are no longer an employee so you would need to apply for posts through the normal recruitment process.

Any vacant post will first be considered for those on the redeployment register due to organisational change, health etc, and if not appointed to through that route then consideration for those on the Retire and Return register. This complies with the DL principle of being considered before others as if the post can be appointed to from those retiring and returning, it will not be advertised.

C. I would like to return and undertake shifts on the staff bank

(1) As a current member of the staff bank, the contract for services will not be terminated.

Or

(2) You are advised to contact the staff bank to obtain a contract for service.
--

D. I would like to return on a part time basis to another post of a different job family

You are advised to apply for advertised vacancies:

- [NHSScotland Recruitment website](#)
- [GP Jobs](#)
- [Practice Jobs](#)

Part 3: To be completed by manager and senior manager, and returned to the applicant

Approved by Manager

Signed	
Please print name	
Designation	
Date	

Endorsed by Senior Manager

Signed	
Please print name	
Designation	
Date	

If applicant wishes to return on a part time basis to another post within the same job family this completed form should be sent to Gram.Redeployment@nhs.scot

Appendix B

Manager to use their letter template

Name of employee

Address

<enter date>

Reference <enter payroll number pre retirement>

Dear <employee name>

Confirmation of Retire and Return

I write to confirm the arrangements for your return following your retirement on <enter date>.

I am pleased to confirm that following your retirement from your post of <enter job title>, <enter Band> and <enter hours> contracted hours, you are to return on a part time basis to the same post. Your job title, band and salary placement remain the same with the new agreed working arrangements noted below:

- <enter start date>
- <enter hours> contracted hours
- <enter days of work>
- On-call or no on-call (delete as appropriate)
- <enter location>
- Permanent contract or a fixed term contract until <enter date> (delete as appropriate)

Your return is under the NHS Scotland National Interim arrangement on Retire and Return (DL(2022)30).

As part of the arrangement it was your responsibility to contact the Scottish Public Pensions Agency regarding the effect any of the above may have on your pension benefits.

Your return working arrangements have been communicated to the HR Service Centre who will issue you with a new payroll number and contract of employment.

<End letter with a personal message about the positive impact on the service due to returning after retirement>

Yours sincerely

Manager's name

Job Title

Flowchart - Retire and Return



