



**Joint Policy for Cumbria Partnership Foundation Trust & North Cumbria
University Hospital NHS Trust**

Joint Flexible Retirement Policy

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Policy Author	HR Business Partner/HR Advisor

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Any printed copies or copies held on any other web page should therefore be viewed as “uncontrolled” and as such, may not necessarily contain the latest updates and amendments.

Data Protection Legislation

The Trust(s) are committed fully to compliance with the requirements of the General Data Protection Regulations (GDPR) 2016 and the Data Protection Act (DPA) 2018. The GDPR and DPA legislation aims to balance the requirements of organisations to collect, store and manage various types of personal data in order to provide their services, with the privacy rights of the individual about whom the data is held.

The GDPR and DPA legislation covers both manual and computerised records in any format, where the record contains details that can identify, directly or indirectly data on a natural person or persons. The DPA sets out principles which must be followed by those who process data; it gives rights to those whose data is being processed

Policy On A Page

SUMMARY & AIM

Flexible Retirement can benefit both the Trusts and our employees by helping retain valuable skills and experience for patient care as well as supporting staff health and wellbeing, work/life balance and potentially realising financial savings through reduced recruitment costs, bank and agency spend.

The purpose of this policy is to help Managers consider applications from staff who wish to 'retire and return' to work for the Trusts so that decisions to re-employ staff who have taken their NHS Pension Scheme benefits can be justified on the grounds of service need and value for money.

This policy is not provided as an alternative to in depth NHS Pension detail available at NHS Pensions Online.

TARGET AUDIENCE:

Staff who are members of the NHS Pension Scheme wishing to 'retire and return'. Managers who are responsible for considering requests from staff to 'retire and return'.

TRAINING:

Advice on the application of this Policy is available from the Human Resources department.

KEY REQUIREMENTS

NHS Pension Scheme rules allow members to take their accrued pension benefits and then ask to return to work in the NHS. The underlying principles of 'retire and return' are to:-

- ensure older workers, who have valuable skills, knowledge and experience, can continue working for the benefit of patients;
- ensure older workers can be supported in prioritising their health and wellbeing at the same time as working longer/staying in work;
- support staff in making the transition from work to retirement through, for example "stepping down" (reducing their level of responsibility) and/or "winding down" (reducing their number of hours worked);
- demonstrate value for money.

All applications to 'retire and return' will be considered in line with these principles, taking into account service, financial and workforce needs.

Each case will be considered on its own merits and decision-making will take account of current and future workforce requirements.

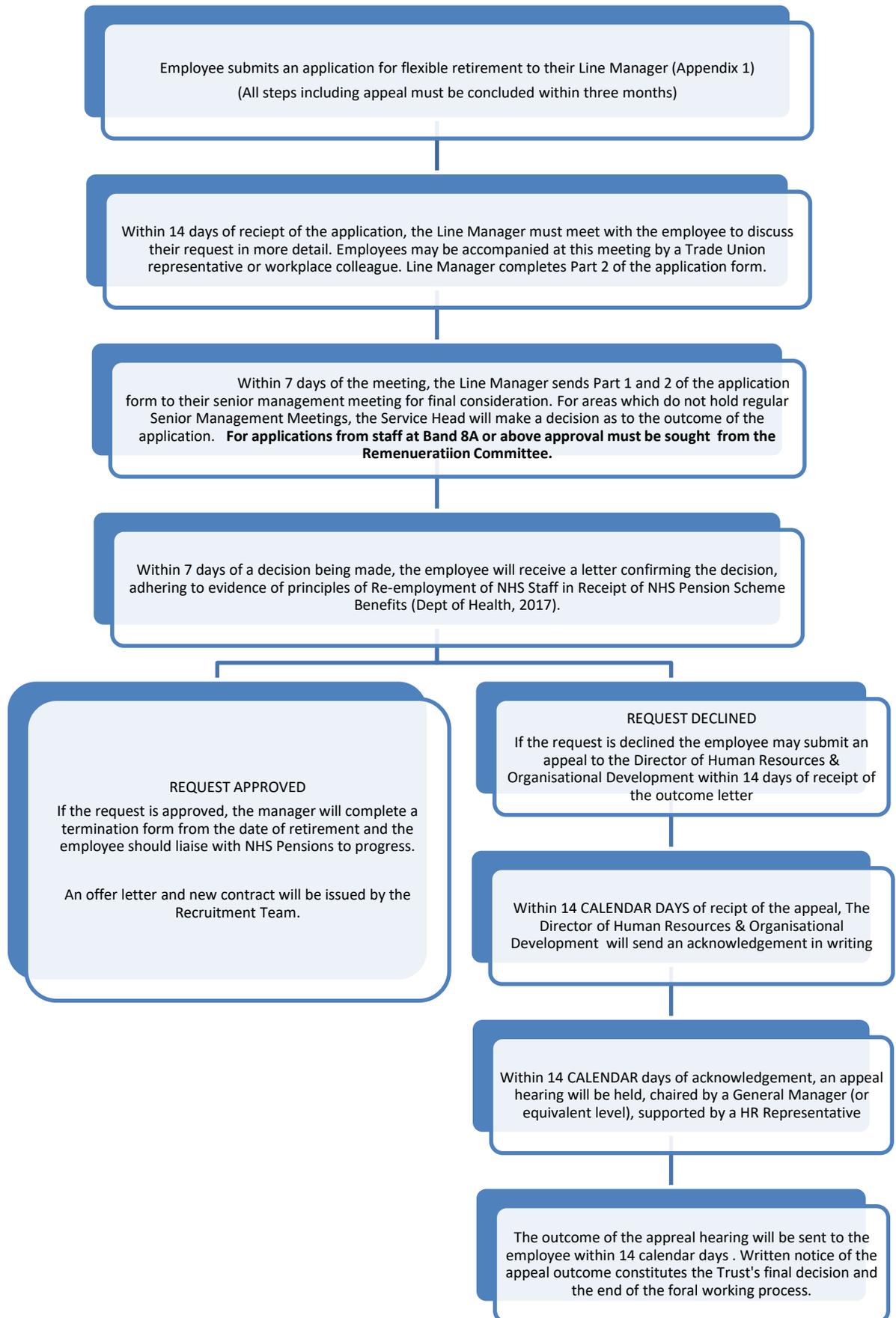
Applications to 'retire and return' from staff at Agenda for Change Band 8a or above will be subject to approval from the Trusts' Remuneration Committee.

The Trusts adhere to all rules outlined in NHS Pension guidance. This policy is not a substitute for those.

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SUMMARY FLOWCHART: FLEXIBLE RETIREMENT



1. INTRODUCTION

This policy applies to all employees who are considering retirement and who are members of the NHS Pension Scheme. The pension information is in summary form only and is **not** intended to be the sole source of information. Employees requesting further information should contact:

www.nhsbsa.nhs.uk/pensions

NHS Pension Helpline: 0300 3301 346

Trusts Pension Lead – David.Ash@northumbria.nhs.net

For information regarding ill Health Retirement, employees must refer to the Attendance Management Policy and Procedure.

The Trusts recognise and value the significant contribution of their workforce and the knowledge and skills that employees have gained over the length of their employment. Flexible retirement offers employees different options prior to retirement including remaining in employment or retiring and returning to employment, helping the Trusts to retain valuable skills.

The details contained within this policy are compliant with employment law, best practice and the Trusts' values.

Although the priority of the Trusts must be to ensure service delivery at all times, the Trusts will try to offer all staff the opportunity to work flexibly.

The Trusts also confirm their commitment to fair and equitable treatment of all members of staff irrespective of age, gender, marital status, disability, race, colour, national/ethnic origins, religion or sexual orientation in the utilisation of this policy.

For the Trust's responsibilities and commitments under the Equality Act, please refer to the Trust's Equality and Diversity policies.

2. PURPOSE

It is important that before making any decision about retirement, employees have all the relevant information. Employees, in the first instance, may wish to discuss the options available with their Manager, Trade Union representative, or a member of the Human Resources Department.

Individuals must contact NHS Pensions for any detailed information regarding their individual circumstances and estimates of benefits.

3. POLICY DETAILS – RETIREMENT AGE:

The Trusts do not have a mandatory retirement age.

3.1 NHS Pension Retirement and Benefits

Employees who are members of the NHS Pension Scheme are entitled to retire from the scheme, draw a pension and cease work at different times, dependent on which Pension Scheme they are in. The age at which an individual is entitled to retire will be dependent upon which section of the NHS Pension Scheme they are in and whether they have 'special classes' or Mental Health Officer status (MHO) (see point 3.2 below).

- The normal retirement age for employees in the 1995 section of the NHS Pension scheme is 60.
- The normal retirement age for employees in the 2008 section of the NHS Pension scheme is 65.
- The normal retirement age for employees in the 2015 section of the scheme is in line with state pension age.

An employee who is eligible for an NHS pension may choose to take 'voluntary early' retirement and reduced benefits before their normal retirement age.

- For employees in the 1995 section of the scheme this is from the age of 50 (or 55 for some members).
- For employees in the 2008 section of the scheme this is from the age of 55.
- For Employees in the 2015 section of the scheme, this is dependent on state pension age.

3.2 Special Class Status

Certain employees who were members of the scheme before 6 March 1995 are classified as being within the scheme's 'special classes.' Eligible employees are entitled to retire at the age of 55 without a deduction to the benefits they receive subject to certain criteria being met. This applies to an employee in the role of Nurse, Physiotherapist, Midwife or Health Visitor.

3.3 Abatement Rules

If an employee wishes to return to the NHS and is benefiting from drawing down pension as a result of MHO status or special class status, the abatement rules restrict earning ability depending on which pension scheme the employee is in.

This is to avoid an employee earning more, by drawing down their pension early and returning to work, than they would have done if they had continued working.

3.3.1 When does abatement apply?

For example, abatement might apply if you are under the normal scheme pension age (60 in the 1995 section, or 65 in the 2008 section), and return to NHS employment following retirement on the following grounds:

- Ill health
- The early payment of a deferred pension on the grounds of ill health, or
- In the interests of the efficiency of the service.

3.4 Giving Notice of Retirement

An employee must give their contractual notice when leaving their employment, however where an employee is taking NHS pension benefits, they are advised to give a minimum of 4 months' notice in writing so that their pension application can be processed in good time and payment arranged for the appropriate dates.

When a date of retirement is agreed the Manager will complete a Termination Form, effective from the retirement date.

3.5 Flexible Retirement Options

3.5.1 Step down

Step Down may be an option either through NHS Jobs application, as part of ill-health redeployment or via submission and approval of a Flexible Working Request. This would need to follow rules and processes set out in the NHS Pensions Regulations and Trusts Attendance Management Policy.

An employee wishing to Step Down will need to contact NHS Pensions directly to confirm the earliest date they can retire as there is no longer a compulsory retirement age.

Where such requests are made the employee must also provide their intended date of retirement and plans will commence on that basis.

3.5.2 Wind down

Employees can request to reduce their working commitments by 'winding down' in the lead up to retirement by reducing their working days or contractual hours whilst remaining in their current post.

Any employee who wishes to wind down should submit a flexible working request in line with the Flexible Working Policy.

The Manager will confirm in writing the outcome of the request and the arrangements agreed during the 'wind down.' The Manager is also responsible for completing Post Change forms and re-calculating annual leave.

3.5.3 Retire and return to NHS employment

The underlying principles of 'retire and return' are to:-

- ensure older workers, who have valuable skills, knowledge and experience, can continue
- working for the benefit of patients;
- ensure older workers can be supported in prioritising their health and wellbeing at the same
- time as working longer/staying in work;
- support staff in making the transition from work to retirement through, for example
- "stepping down" (reducing their level of responsibility) and/or "winding down" (reducing
- their number of hours worked;
- demonstrate value for money.

There is no guarantee that applications to 'retire and return' will be granted. Each request will be considered on its own merits in line with the above principles and taking into account service, financial and workforce needs:

An employee may request that they retire, commence receiving pension benefits and come back to work on reduced hours in the same or a changed capacity after a short break.

In this case an individual would be resigning in order to take their pension and there is no automatic right to return to their original job or another role or on the same hours.

On retire and return, when returning to a different role, a full application process should be followed i.e. the employee does not automatically slot in as they are not at risk. The employee must return to an existing vacancy, a role will not be created to accommodate a request for flexible retirement.

Managers must be able to demonstrate that there is a business requirement for posts to be filled through 'retire and return' and that they have considered:-

- the requirement for the posts to be filled through 'retire and return' in light of cost improvement pressures etc.;
- equality requirements;
- value for money;
- the standard of the employee's work and attendance;
- the employee's competence (skills, knowledge, and experience) against the essential requirements of the post;
- whether the hours proposed can be accommodated/meet service needs;
- succession planning and the potential impact the employee's return will have on their team; whether it is in the best interests of the service to accommodate the 'retire and return' request;
- longer term workforce/service plans for the pot and team and how the 'retire and return' request fits with this.

This Policy does not prevent staff from applying for a post via NHS Jobs and taking their Pension as long as National and Local NHS Pensions Criteria are met. If a post successfully applied for is permanent or of a different fixed term duration, this surpasses the 12 month fixed term requirement required when seeking approval via Appendix 2.

All approved Appendix 2 requests will be subject to the employee's agreement to return on a maximum 12 month fixed term contract basis, reviewable annually. For Medical and Dental staff, this will also be subject to agreement for a mobility clause enabling the Trusts to direct any returnee to fill any vacant hours across Cumbria.

Requests from employees at Band 8a or above to 'retire and return' are subject to approval by the Trusts' Remuneration Committee.

- As detailed above, if an employee has Special Class status and returns to work before the age of 60, the pension may be subject to abatement. The same may apply to employees with MHO status.
- Appendix 2 approval of a request to retire and return is at the discretion of the organisation. The decision will be based on the organisational needs to retain operationally-critical skills and will be considered by General Manager or equivalent.
- All retiring and returning staff must take a minimum break of two weeks (14 days).
- Following the two week break the employee can return to work, for a maximum of 16 hours per week, for the first two weeks. Hours can be increased after this period subject to national pension criteria.

3.5.4 Documentation:

Applications for Flexible Retirement should be made using the Flexible Retirement Request Form (See Appendix 2), incorporating the employers checklist.

Managers are responsible for completing the termination form and sending this to HR Forms/ESR Bureau at least 4 months (if possible) prior to the employee's retirement. In addition a New Appointment form needs to be completed confirming re-engagement. A Change form may also need to be completed to confirm increased hours after 1 calendar month if applicable.

- Please note members of the 1995 section will not be eligible to re-join the NHS Pension Scheme on their return to employment.
- Once an employee retires and receives their pension benefits in relation to their NHS service, this service will no longer be counted as 'reckonable' for redundancy purposes (paragraph 16.6 NHS terms and conditions of service handbook – Amendment No 35).

From the NHS Terms and Conditions of Service Handbook, the following employment will not count as reckonable service:

“Where the employee has previously been given pension benefits, any employment that has been taken in to account for the purposes of those pension benefits.”

- Employees should be aware that they are ultimately responsible for making sure their pension entitlements are not unduly affected in their decisions about flexible retirement.

3.5.5 Draw down

Employees may wish to take part of their pension benefits whilst continuing in NHS employment, known as a ‘draw down’.

- Please note this option is **not** available to members of the 1995 section.
- For further information employees should contact NHS Pensions direct.

3.6 Early retirement reduction buy out (ERRBO)

This new provision to the 2015 pension scheme arrangements allows employees to make additional contributions to the scheme. Further information is available on the NHS Pension website.

3.7 Flexi Retirement Breaks and Annual Leave

Annual leave entitlement during a 2 week compulsory Flexible Retirement Break would be in line with the Annual Leave Policy. All outstanding annual leave must be taken prior to a Flexible Retirement Break. Failure to do so will alter the return date and can delay Pension receipt.

3.8 Sickness Staging for Retiring and Returning

Staff members Retiring and Returning under this Policy will, on return, remain under the same stage of the Trusts’ Attendance Management Process as before they retired.

3.9 Pre Retirement Seminars

Pre-Retirement seminars are generally run annually. Further details on courses available can be found on the Learning and Development intranet pages.

3.10 Return to Work in a Bank Capacity

The ‘Bank’ for Nursing, Admin & Clerical and Professional Staff maintains links with skilled and experienced individuals who may be happy to return to work for a short period during times of peak activity.

Employees who wish to be considered for ‘Bank’ work should discuss this with their Manager.

3.11 Right of Appeal

An employee whose request has been refused can appeal to the declining manager who will arrange an appeal meeting with the next level manager. The appeal should be in writing, stating the reasons for appeal.

A meeting will be arranged to hear the appeal and the employee will be informed of the appeal outcome, in writing, as soon after the hearing as possible. The appeal panel with either:

- 1) Uphold the appeal, specify the agreed variation and start date or
- 2) Dismiss the appeal, stating the grounds for the decision and containing a sufficient explanation for the refusal. This decision is final.

4. TRAINING AND SUPPORT

Managers will be trained and supported in the Flexible Retirement Process VIA the People management Programme.

5. PROCESS FOR MONITORING COMPLIANCE

The process for monitoring compliance with the effectiveness of this policy is as follows:

Aspect being monitored	Monitoring Methodology	Reporting		
		Presented by	Committee	Frequency
The equal opportunity of staff to apply to retire flexibly	Analysis of the equality profile of applicants for flexible retirement	Human Resource Business Partner	Equality and Diversity Steering Group	Annually – 1 st April to March 31 st
The compliance to policy when Managing Flexible Retirement applications.	Review 20 Flexible Retirement across both trusts and measure against policy timescales	Human Resource Business Partner	Quality and Safety Committee	Annually – 1 st April to March 31 st

Wherever the above monitoring has identified deficiencies, the following must be in place:

- Action plan
- Progress of action plan monitored by the WF and OD Senior Management Team minutes.
- Risks will be considered for inclusion in the appropriate risk registers

6. REFERENCES:

- NHS Terms and Conditions of Service Handbook.
- NHS Pensions Regulations.

7. ASSOCIATED DOCUMENTATION:

- Attendance Management Policy
- Attendance Management Policy – Managers Toolkit
- Equality and Diversity Policies
- Flexible Working Policy
- Re-employment of staff in Receipt of NHS Pension Scheme Benefits. Guidance for Employers and Staff (Dept of Health, 2017).

8. DUTIES (ROLES & RESPONSIBILITIES):**8.1 Chief Executive / Trust Board Responsibilities:**

The Chief Executive and Trust Board jointly have overall responsibility for the strategic and operational management of the Trust, including ensuring that Trust policies comply with all legal, statutory and good practice requirements

8.2 Executive Director Responsibilities: Director of Workforce and Organisational Development

The Director of Workforce and Organisational Development has overall responsibility for the strategic and operational management of the Trust, including ensuring that Trust policies comply with all legal, statutory and good practice requirements.

8.3 Line Manager Responsibilities:

Line managers are responsible for ensuring effective and consistent application of this policy and in supporting employees in its use. Line managers must attempt to deal with issues sensitively and without undue delay.

8.4 Staff Responsibilities:

All staff are responsible for ensuring that they comply fully with this policy.

8.5 Human Resources Staff (HR) Responsibilities

HR will provide advice and support on case management and progression to ensure fair and equitable outcomes.

8.6 Approving Committee Responsibilities: Joint Partnership Forum

The Chair of the Joint Partnership Forum will ensure the policy approval is documented in the final section of the Checklist for Policy Changes. The committee will agree the approval of the final draft of the policy. The committee will ensure monitoring compliance via the Equality and Diversity Steering Group.

The WF and OD Senior Management Team are responsible for the monitoring of this policy.

9. ABBREVIATIONS / DEFINITION OF TERMS USED

ABBREVIATION	DEFINITION
CPFT	Cumbria Partnership NHS Foundation Trust
DPA	Data Protection Act
ERRBO	Early Retirement Reduction Buy Out
ESR	Electronic Staff Record
GDPR	General Data Protection Regulation
HR	Human Resources
MHO	Mental Health Officer
NCUH	North Cumbria University Hospitals NHS Trust

TERM USED	DEFINITION
Draw down	Taking part Pension Benefits while continuing to contribute to scheme.
Wind Down	Reducing working commitments by 'winding down' in the lead up to retirement by reducing working days or contractual hours whilst remaining in current post.

10. DOCUMENT CONTROL

Equality Impact Assessment Date	10/01/2019
Sub-Committee & Approval Date	Joint Partnership Forum 05/04/2019

History of previous published versions of this document:

Trust	Version	Ratified Date	Review Date	Date Published
CPFT	2	October 2017	October 2019	October 2017
NCUH	1	N/A	N/A	N/A

Statement of changes made from previous version

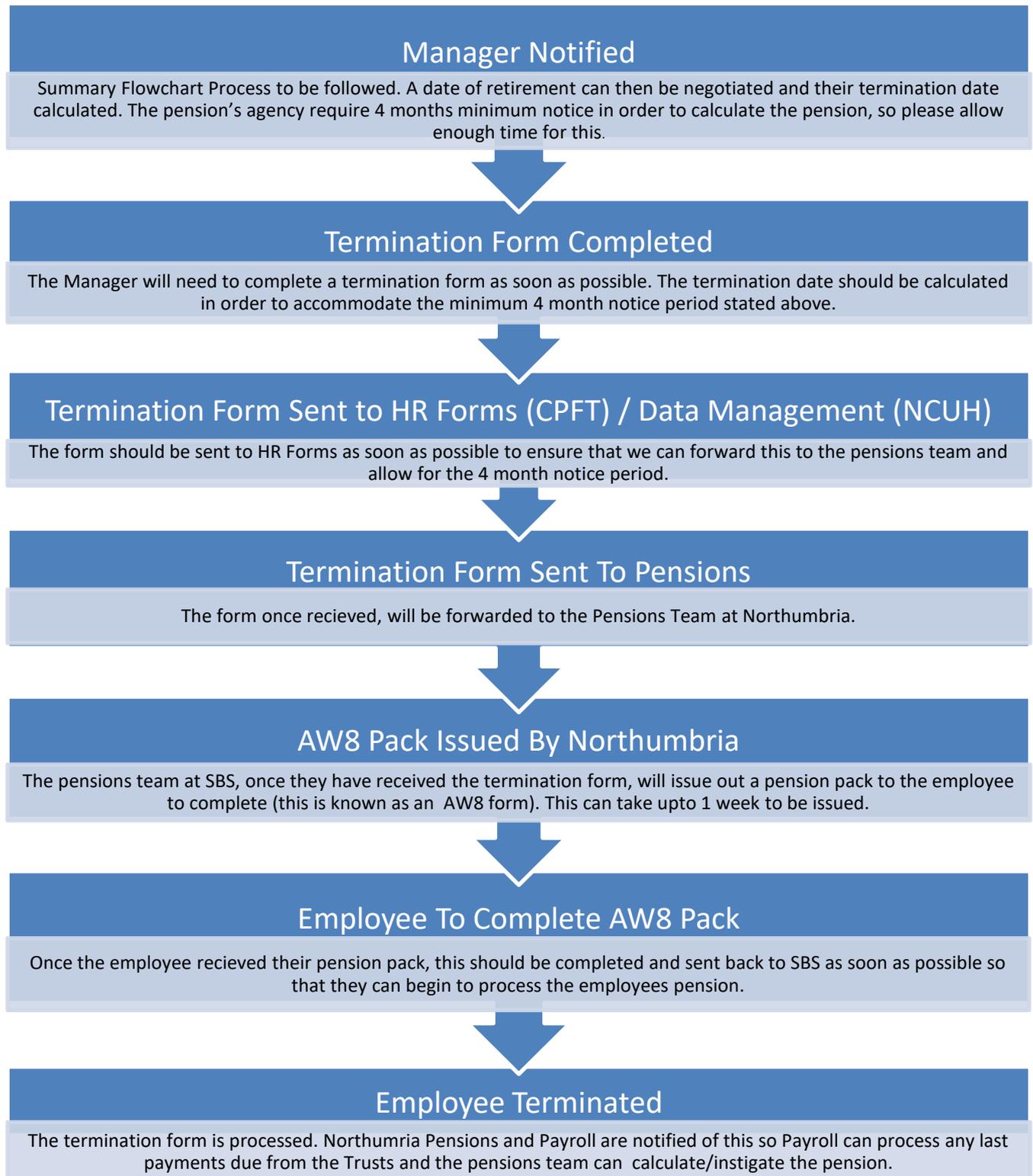
Version	Date	Section & Description of change
V1.0	06/08/2019	<ul style="list-style-type: none"> updated to reflect DoH Guidance on re employment of staff in receipt of NHS Pension benefits
V0.1 (new joint policy)		<ul style="list-style-type: none"> P2 IG Statement (New) P3 Policy on a page (New) P5 Summary Flowchart – New P6 and all Trust to Trusts and Sickness Management to Attendance Management P7 – Retirement Age shortened '<i>the age at which staff retire will have a bearing on their pension</i>' taken out P8 line changed as follows: When a date of retirement is agreed the Manager will complete a Termination Form, effective from the retirement date. P8 - Wind Down – Altered to refer directly to Flexible Working Requests in Flexible Working Policy P8 – 3.5 Step Down. Shortened and several paragraphs taken out, step down will no longer carry automatic right to be put on redeployment register as it was felt this was unfair to staff undergoing Org Change. Although still mentioned, step down will now either be through NHS Jobs application or as part of ill health redeployment P12 – 8 Now references attendance management and flexible working policy Link to Forms Process removed and placed in managers toolkit This policy is Version 1 for NCUH – flexible working options were previously outlined in the Flexible Working Policy. The new policy gives employees a more comprehensive overview of both the retirement options available to them and also the application process which must be followed.
	26/07/2019	<ul style="list-style-type: none"> Updated to reflect Department of Health Guidance for employers and staff – Re-employment of staff in receipt of NHS Pension Scheme Benefits, July 2017.

A11. LIST OF STAKEHOLDERS WHO HAVE REVIEWED THE DOCUMENT

Name	Job Title	Date
Care Group Senior Management Teams		14/01/2019
Staff-side Representatives		05/04/2019
Joint HR Policy Sub Group		05/04/2019

APPENDIX 1: GUIDANCE FOR MANAGERS AND EMPLOYEES ON SUBMISSION OF TERMINATION FORM AND PENSION APPLICATION

Please follow the retirement process below for all employees:





APPENDIX 2 - FLEXIBLE RETIREMENT REQUEST FORM

(PART 1)

Please complete the form in full to help the Trust to consider your request. Where information is not complete, your manager will ask you for clarification and this may delay the consideration of your request.

FULL NAME			
SITE		DEPARTMENT:	
POST			
Current Working Pattern (days/hours/times):		Requested Working Pattern (days/hours/times):	
Proposed end date in current role (at least a two weeks prior to return date):			
Proposed start date in revised role/hours:			
Reason for the request			
Impact of the requested working pattern (use separate sheet if required) Please describe how you think this change in your pattern will affect your current duties, department/ward and colleagues:			
Accommodating the new working pattern (use separate sheet if required) Please state how the impacts shown above can be dealt with:			
Date(s) of any previous requests(s):			
Signed:		Date:	

**APPENDIX 1 (Cont.)
(PART 2)**

Line Manager COMMENTS regarding discussions held with employee:

Name of Line Manager _____ (Copy to HR Department)

I confirm I have received your request for Flexible Retirement and will arrange for it to be considered.

Signed:

Title:

Date:

(PART 3)

To be completed by the General Manager or equivalent. Applications from employees at Band 8a or above are subject to approval by the Trust's Remuneration Committee.

Your request for flexible retirement has been considered and it is confirmed your application has been:

- Agreed in that the following can be evidenced (In line with Department of Health, 2017, Re-Employment of staff in receipt of NHS Pension Scheme Benefits):

Requirement	Evidence
The requirement for the post to be filled through 'retire and return' in light of cost improvement pressures etc.	
That equality of opportunity has been demonstrated in approval of flexible retirement	
That allowing flexible retirement demonstrates value for money.	
Attendance and standard of work are acceptable.	
The employee can demonstrate skill, knowledge and experience against the essential criteria of the post	
That the hours proposed can be accommodated and meet service needs	
Succession planning and the potential impact the employees return can have on their team.	
That it is in the best interests of the service to accommodate the 'retire and return' request.	
That approval of the 'retire and return' request accommodates longer term workforce/service plans for the post and team and how the 'retire and return' request fits in with this.	

In case of flexible retirement, there must be a break in service of two weeks. Your retirement date is therefore agreed as and your agreed return to work date in your new post is

- Declined for the following reasons:
 - the burden of additional costs
 - inability to reorganise work among existing employees
 - inability to recruit additional employees
 - detrimental impact on quality
 - detrimental impact on performance
 - detrimental effect on ability to meet service demands
 - insufficient work during the period the employee proposes to work
 - planned structural change where it is considered the flexible working changes may not fit with these plans

An explanation of why the above grounds apply is as follows:

SIGNED _____

DATE _____

**TO BE COMPLETED BY RECRUITMENT TEAM****APPENDIX 3: TEMPLATE LETTER**

Our Ref: Flexible Retirement

Date:

PRIVATE & CONFIDENTIALDirect Tel:
Email:

Dear

FLEXIBLE RETIREMENT

I write to confirm arrangements in relation to your request for flexible retirement following your discussion with . This request has now been formally approved by the Trust and I confirm the arrangements will be effective from the . Please note that as part of the procedure for flexible retirement, will need to complete a termination form for you (and you will receive your P45 as a result of this). Your termination date will be the . The Trust requires you to take 2 weeks break in employment and upon your return your details will then be re-entered onto the Electronic Staff Record, commencing the .

You should note the Pensions Agency rule is that employees must take a break of at least one day before returning and in these circumstances must not work more than 16 hours per week during the first calendar month following a break of one day.

Therefore, as you will be taking a break of 2 weeks prior to your return, you will only be required to work a maximum of 16 hours per week for the remainder of the calendar month (i.e. up to) following your return.

After this time, and if an increase in hours has been agreed, your manager will complete an Employment Change Form for you to confirm your increased hours.

I would like to make you aware of the impact of taking flexible retirement and your NHS Pension Scheme retirement benefits on redundancy pay, if you were subject to redundancy in the future. Under the NHS Terms and Conditions of Service section 16.6 the following employment will not count as reckonable service, i.e. service on which the redundancy pay is calculated:

- *where the employee has previously been given NHS pension benefits, any employment that has been taken into account for the purposes of those pension benefits.*

Also if you haven't already done so, please can you contact David Ash, Pensions Officer, on 0191 203 16751 and request an AW8 form. This is the form that needs to be completed

to access your pension. Please note that it can take up to 4 months to access your pension from the date the AW8 form is received by the Pensions Department. I would like to draw your attention to part 5 of the AW8 form, which requires verification of certain documents, e.g. birth certificate, marriage certificate etc.

If you have not already done so, please bring these documents to your line manager for copying and verification and forward together with the AW8 form to David Ash, Pensions Officer, NHS Payroll Services, Northumbria House, Unit 7-8 Silverfox Way, Cobalt Business Park, Newcastle upon Tyne. NE27 0QJ.

Prior to you recommencing your employment, the Trust must carry out identity and document verification and pre-employment clearances, if these have not been fully recorded on your personal file in the past. Please note that if these are not completed in time, your starting date will have to be deferred.

Therefore, please telephone me on 01228 608128 (on receipt of this letter) to arrange an appointment for you to meet with me in the Recruitment Office, Maglona House, Kingstown Broadway, Carlisle, CA3 0HA, to bring the completed forms and documents requested below. Staff based at West Cumberland Hospital will be able to attend for checks locally. If you have any questions regarding the documents or forms, or cannot provide the documents listed below, please contact me.

Verification Documents

Please bring the originals of the following documents to your appointment:

- Current Passport.
- Photo Driving Licence (or paper licence).
- Birth Certificate (long form).
- Two different documents, **less than 3 months old**, showing your current address e.g. bank statement, credit card statement, utility bill (**please refer to the enclosed list of acceptable address documents**).
- Professional Registration documents/current NMC Registration Card (where applicable).
- **If you have documents in your maiden name, you will be required to present your marriage certificate.**

If you are unable to provide any photographic ID please contact me on the above telephone number and you will be informed of the alternative options.

Please complete and bring to your appointment the enclosed Staff Appointment form with Part A fully completed. Please note, if you require to register with a professional organisation, e.g. NMC or HCPC, please ensure that you insert your registration number on the Staff Appointment Form. Your salary cannot be paid until we have received this information.

Health Clearance

Your return from flexible retirement is subject to satisfactory health clearance. You are

therefore required to complete and return the enclosed pre-employment Health Screening questionnaire, and may also be subject to clearance by the Trust's Occupational Health Service as appropriate.

I must also make you aware that on your return, you will remain under the same stage of the Trusts' Attendance Management Process as before you retired.

Clearance must be received prior to you recommencing employment and it is therefore imperative that you return the form at the earliest possible opportunity.

Disclosure and Barring Service (DBS)

The offer of employment is subject to satisfactory clearance with the Disclosure & Barring Service. It is Trust policy that a check must be completed and clearance must be received for anyone working with children or vulnerable adults prior to starting in post.

Please complete an online application form via the following link:

<https://disclosure.capitarvs.co.uk/cheqs/>

Enter the applicant side (orange box) and input the following information to gain access to the application form:

Organisational Reference: NCUHT
Password: DBS2017

You will receive a personal copy of the Disclosure from the DBS, it is imperative that you present this to the Recruitment team as soon as possible after receipt.

Where the Disclosure reveals a conviction, caution, reprimand, final warning, or other concern to the Trust, consideration will be given to all available information, the particular circumstances and the type of post in relation to confirmation of employment.

Your 'Statement of Particulars of Employment' in relation to your post will be sent to you in due course.

Please do not hesitate to contact me should you have any queries, or require any further information.

Yours sincerely

<<Recruitment Advisor>>
RECRUITMENT TEAM



**APPENDIX 4
FLEXIBLE RETIREMENT REQUEST NOT APPROVED**

Date

PRIVATE & CONFIDENTIAL

Name of Employee

Address

Address of Line Manager

Tel No:

Email:

Dear (name of employee),

Flexible Retirement – NOT APPROVED

With reference to your application for Flexible Retirement, in line with Trust policy, I am writing to confirm my decision.

After carefully considering all the issues involved, I am sorry to confirm that I have been unable to approve your request for the following reasons:

(Insert reasons; including reason (See part 3 of Flexible Retirement Application Form))

I have completed the Request Form and enclose a copy for your records.

You have the right to appeal against this decision in writing to .

Yours sincerely

**SENIOR MANAGER
JOB TITLE**

Copy to: Human Resources Advisor
Human Resources Department
Employee Personal File