

## TRUST-WIDE NON-CLINICAL GUIDELINES DOCUMENT

# RETIREMENT GUIDELINES

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2015 – Version 1

Quality, recovery and wellbeing at the heart of everything we do

**TRUST-WIDE NON-CLINICAL GUIDELINES DOCUMENT**

**RETIREMENT GUIDELINES**

**Further information about this document:**

Document name	<b>RETIREMENT PROCESS (REFERENCE NUMBER ??)</b>
Document summary	These guidelines have been developed in order to provide information for staff who are retiring and accessing their pension benefits. The process to be followed when applying for pension benefits is outlined, and useful contacts for further information are also included.
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To be read in conjunction with	<b>These guidelines should be read in conjunction with the NHS Pension Scheme Guide which is available at <a href="http://www.nhsbsa.hns.uk">www.nhsbsa.hns.uk</a></b>
<b>This document can be made available in a range of alternative formats including various languages, large print and braille etc</b>	
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**Version Control:**

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2015 Version 1	Policy Group Executive Committee	May 2015 May 2015

**SUPPORTING STATEMENTS** – this document should be read in conjunction with the following statements:

### **SAFEGUARDING IS EVERYBODY'S BUSINESS**

All Mersey Care NHS Trust employees have a statutory duty to safeguard and promote the welfare of children and vulnerable adults, including:

- being alert to the possibility of child/vulnerable adult abuse and neglect through their observation of abuse, or by professional judgement made as a result of information gathered about the child/vulnerable adult;
- knowing how to deal with a disclosure or allegation of child/adult abuse;
- undertaking training as appropriate for their role and keeping themselves updated;
- being aware of and following the local policies and procedures they need to follow if they have a child/vulnerable adult concern;
- ensuring appropriate advice and support is accessed either from managers, *Safeguarding Ambassadors* or the trust's safeguarding team;
- participating in multi-agency working to safeguard the child or vulnerable adult (if appropriate to your role);
- ensuring contemporaneous records are kept at all times and record keeping is in strict adherence to Mersey Care NHS Trust policy and procedures and professional guidelines. Roles, responsibilities and accountabilities, will differ depending on the post you hold within the organisation;
- ensuring that all staff and their managers discuss and record any safeguarding issues that arise at each supervision session

### **EQUALITY AND HUMAN RIGHTS**

Mersey Care NHS Trust recognises that some sections of society experience prejudice and discrimination. The Equality Act 2010 specifically recognises the *protected characteristics* of age, disability, gender, race, religion or belief, sexual orientation and transgender. The Equality Act also requires regard to socio-economic factors including pregnancy /maternity and marriage/civil partnership.

The trust is committed to equality of opportunity and anti-discriminatory practice both in the provision of services and in our role as a major employer. The trust believes that all people have the right to be treated with dignity and respect and is committed to the elimination of unfair and unlawful discriminatory practices.

Mersey Care NHS Trust also is aware of its legal duties under the Human Rights Act 1998. Section 6 of the Human Rights Act requires all public authorities to uphold and promote Human Rights in everything they do. It is unlawful for a public authority to perform any act which contravenes the Human Rights Act.

Mersey Care NHS Trust is committed to carrying out its functions and service delivery in line with a Human Rights based approach and the FREDA principles of **F**airness, **R**espect, **E**quality **D**ignity, and **A**utonomy

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## 1 PURPOSE AND RATIONALE

- 1.1 These guidelines have been developed in order to provide information for staff who are retiring and accessing their pension benefits. They outline the process to be followed when staff wish to apply for their pension benefits.

## 2 SCOPE

- 2.1 These guidelines apply to all staff who are a member of the NHS Pensions Scheme

## 3 DUTIES

- 3.1 **Executive Director of Workforce** – has strategic responsibility to ensure compliance with the policy.
- 3.2 **Line Manager** – will agree leaving date with staff who wish to retire and complete the appropriate documentation for McKesson and will forward to the relevant Human Resources Adviser
- 3.3 **Human Resources Staff** – will request the appropriate form from McKesson and will meet with staff to certify documentation

## 4 PROCESS / PROCEDURE

### Age Retirement

Staff who wish to retire should inform their line manager at least four months prior to their anticipated retirement date. The manager will meet with them to agree their last working day and actual leaving date, taking into account any accrued annual leave. Annual leave is pensionable and should be taken prior to the actual leaving date wherever possible. If it is not possible for the annual leave to be taken before the actual leaving date, the actual leaving date must be extended by the amount of annual leave.

The line manager will complete a leavers form which is accessed via the Workforce Section on Sharepoint. The reason for leaving to be used is 'Retirement –Age'.

The line manager will forward a copy of the leavers form to the Human Resources Advisor for their Division. The Human Resource Advisor will submit a request to McKesson to send the member of staff the Retirement Benefits Claim form AW8, or in the case of deferred benefits form AW8P. Where the member of staff has deferred benefits

The staff member should complete the relevant sections of the AW8 form and contact the Human Resource Advisor to arrange a meeting to verify relevant documentation and to complete relevant sections of the form. Documentation that is required includes:

- Original birth certificate or current passport of the member of staff and his/ her spouse or civil partner.
- Original Marriage certificate or Civil Partnership Certificate.
- Original Birth certificates of any dependent children.
- Certified copy of a death certificate of spouse /civil partner if applicable
- Decree absolute or certified civil partnership dissolution order if applicable

At the meeting, the Human Resources Advisor will check the AW8 and copy the relevant documentation, which they will certify as having seen the originals.

The Human Resources Advisor will then send the AW8 form to the Pensions Team at McKesson to be processed.

### **III Health Retirement**

Where a member of staff has an application for ill health retirement approved, McKesson will automatically send the Retirement Benefits Claim form to the member of staff. If the member of staff is still employed by the Trust, the line manager and Human Resource Adviser will meet with the member of staff to agree a leaving date and to verify relevant documentation and to complete relevant sections of the form.

Where the member of staff has already left the Trust on health grounds, they can request a meeting with the Human Resources Adviser to complete the form and verify the documentation, if they have left in the last 12 months or they can liaise with McKesson directly.

### **NHS Pension Scheme Information**

For further guidance on NHS pensions, staff can contact the NHS Pensions Agency on 0300 330 1346 or visit the website at: [www.nhsbsa.nhs.uk/pensions](http://www.nhsbsa.nhs.uk/pensions).

### **Pre Retirement Seminars**

The Trust offers a Pre-Retirement Seminar for those employees who are approaching retirement in the next 12 to 24 months, and who would benefit from an opportunity to consider the implications that this will have on their lives. The seminar provides information regarding:

- NHS Pension Scheme
- Flexible Retirement Options
- State Pension Scheme
- Tax
- Savings, Investment and Risk
- Wills
- Inheritance Tax Planning
- Long Term Care
- Where to go for Advice

Details of when courses are available on the Learning Bulletin on Yourspace

## **5 CONSULTATION**

5.1 The following staff / groups were consulted with in the development of this policy document:

Staff Side Representative via the HR Policy Group

## **6 TRAINING AND SUPPORT**

Ad hoc Retirement Sessions will be held by the Trust for those staff who are considering retirement