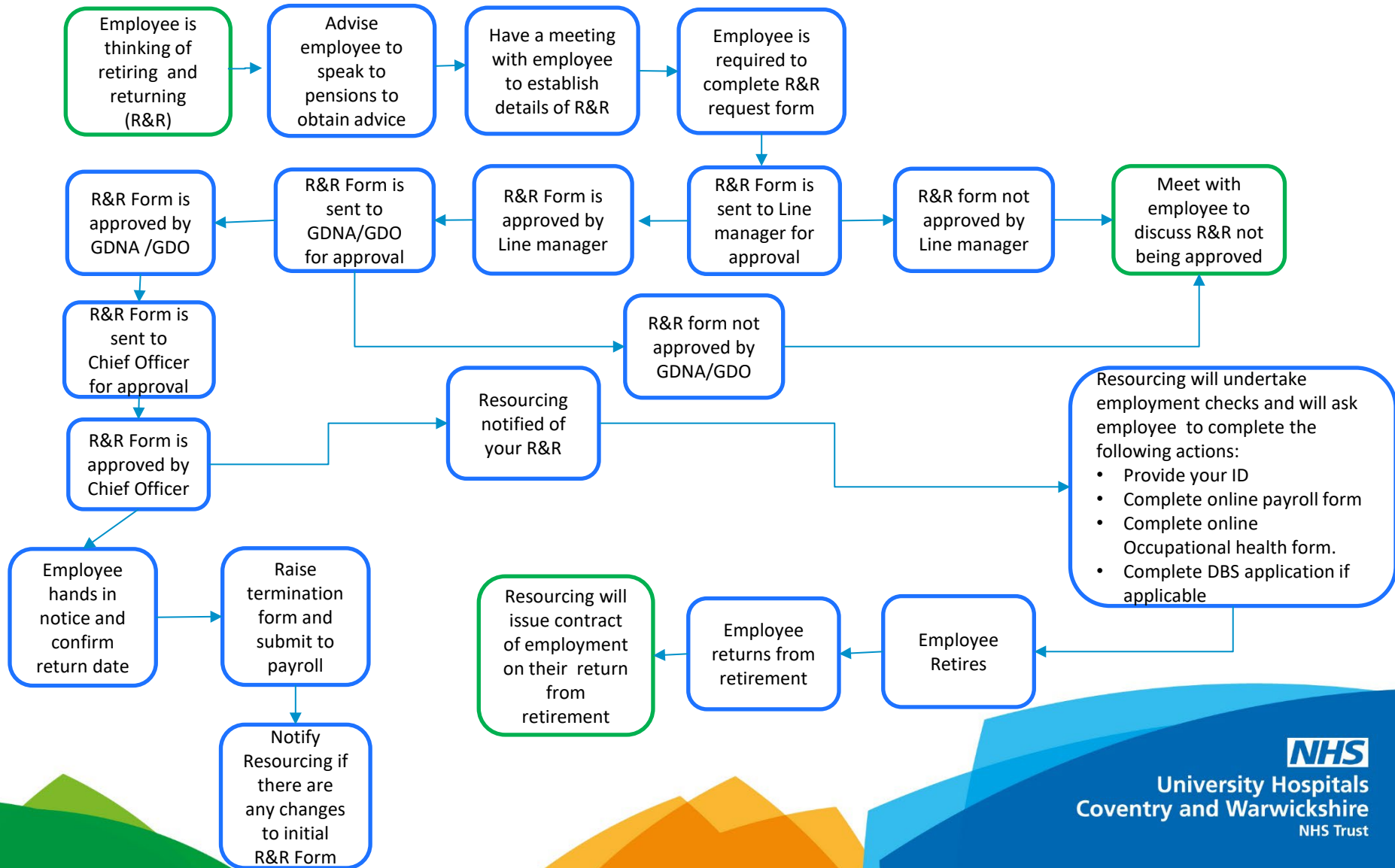


Managers Toolkit Retire & Returners

Important Information - Retire & Return

1. Upon retirement, all assignments, including bank shifts, must be terminated.
2. Retires must observe a minimum of **24-hour break** before returning from retirement.
3. A retiree returner (R&R) form must be completed and authorised before a retiree can retire and returner.
4. Any changes to the initial retiree returner form, must be communicated to the resourcing department
5. Upon retirement and return, the resourcing department will conduct several employment checks, including right to work, ID verification, occupational health, and DBS (if applicable).
6. Access to various systems, such as ICT, ESR, ID badge, Car Parking, and E-Rostering, will be removed.
7. During the period between leaving and returning from retirement, the retiree will be unable to work bank shifts.
8. Annual leave will need to be taken before retiring.
9. Upon return from retirement, a new assignment in ESR will be created and access to ICT, ESR, ID badge, car parking, and E rostering will be reactivated.

Retiring and Returning Flow Chart



Retiree Returner Form

Your staff member can access the retiree returner form by following the below link

Or they scan the below QR

Retiree Returner – Leaver's form for original post

- Upon retirement, all assignments, including bank shifts, must be terminated.
- It is the line managers responsibility to complete the termination form and submit to payroll
- As your employee is retiring and returning – please select reason for leaving as flexi retirement.

LEAVERS FORM: [\[link to intranet\]](#)

Frequently Asked Questions

Frequently Asked Questions – Resourcing

Why does my employee who is retiring returning need to do employment checks?

When your employee retires, all assignments must be terminated. Upon their return from retirement, they will be reinstated on the payroll system as a new employee. Consequently, the employee will need to undergo several employment checks. These checks are requirement to ensure we maintain compliance.

I have an employee who has retired and returned but has not been paid this month.

Please contact the resourcing department on ext. 29192, and they will be able to support you.

Frequently Asked Questions – Bank

My employee is retiring from my substantive post, but I want to stay on the bank, what actions do I need to undertake.

When an employee retires all assignments including bank will be terminated. Therefore, your employee will need to complete the retiree and returner form, indicating they will be returning on bank only. The resourcing department will then contact the employee to complete/ provide paperwork. You can review the bank retiree and returner process flow chart on page 5 of the employee tool kit .

When can my employee start working bank after retirement?

No bank work should be undertaken until they have confirmation from the Resourcing team that all of your employment checks are complete.

Frequently Asked Questions – E rostering

An employee is only retiring for 24 hours / or a short time.

You should use left UHCW on Optima for a break in service to show that the employee is retiring and returning. Adding a note to state 'retire and return' will help to identify them. You can only continue to roster a staff member if they are returning to your department.

Why has my employees bank assignment been closed?

Their bank assignment has been closed as their bank contract is terminated upon retiring – this is to generate a P45 which is a legal requirement. This is the case even if you state on the leavers form, they wish to remain on the bank after you retire. They will need to reapply with TSS, and we will add them back to the bank with a new assignment number once it's live in ESR. This is case if they retire and return as substantive or as bank only staff.

Any queries regarding bank contract should be directed to TSS.

Frequently Asked Questions – E rostering

My employee owes hours on Optima

If your employee owes hours on Optima, they will need to pay these back (by working extra shifts or using annual leave) before retiring from the Trust. As the manager you will need to check the hours are correct.

My employee owed hours on Optima

If your employee has a minus figure and are owed hours on Optima, they must take this as time owing prior to retiring. As the manager will need to check the hours are correct.

Can my employee carry over annual leave for when they return after retiring?

No. You will need to use the annual leave calculator to see how much annual leave they are entitled to up until their retirement date and use it all before. If they have taken more than what they are entitled, they will have to pay it back. When they return – they will be allocated a new entitlement from your return date to the end of that financial year (calculated by ESR). Any queries regarding annual leave entitlements / years of service should be directed to ESR.



Frequently Asked Questions – Payroll

Why does my employee need a new assignment?

As they have retired from the Trust their pension record needs to be closed to enable their pension payments to start. When they return to the Trust this means that we need to set them up on a new assignment number so that NHS Pension can differentiate between the two pension records.

Will my employee's assignment number change?

Yes, they will receive a new assignment number and will lose access to their old assignment number.

How does my employee get their payslips?

As you will lose access to your payslips on their old assignments number it is advised that they download their payslips and P60's prior to their termination date.



Frequently Asked Questions – Pensions

Does the 24-hour break need to be on a scheduled work day?

No. It is ok for it to fall on a non-working day (i.e. on a day off or over the weekend).

Will the employee continue to pay into the NHS pension scheme?

Yes. The employee will be automatically enrolled into the scheme again effective from their return-to-work date.

Can an employee retire & return more than once?

Technically yes. If an employee still has further pension benefits to claim, they may ask to retire & return again at a future time should they wish to claim their additional pension.

Frequently Asked Questions – Pensions

My employee has outstanding annual leave to be paid upon ‘retiring’. Does this affect anything?

YES. Outstanding annual leave will in effect extend the employee’s last pensionable day. This will then affect their potential return to work date. For example:

- An employee retiring on 1st October without any outstanding leave to be paid will then have a 24 hour break on the 2nd and can then return from the 3rd onwards.
- But if they have the equivalent of 1 days leave to be paid, then for pension purposes the retirement date gets extended to 2nd October. The 24 hour break would then be the 3rd and they could not return until the 4th onwards.

The Pensions Team will send you an email confirming the allowable return date should any outstanding annual leave be included on the employee’s leavers form

Contact Details

Add useful contact details.