

28 August 2026

Partial Retirement Procedures

Staff with 1995 benefits:

During the period from 1 April 2024 to the date in 2025 when new partial retirement procedures were introduced:

Between April 2024 to November 2024 work was undertaken regionally by HSC Organisations and HSC Pensions to develop the guidance, processes and put in place the resources, to enable the processing of requests for partial retirement for 1995 scheme members. In December 2024, details of the process and regional guidance were launched and opened to applications.

1. What were the Partial Retirement procedures?

See attached documents that were made available to all staff and managers

- Workflow guides:
 - How to Manage a Partial Retirement Request
 - How to apply for Partial Retirement
- Flexible Retirement Guidance December 2024
- Flexible Retirement FAQs

2. What were the procedures by which managers should consider and respond to partial retirements and within what timescale?

Refer to question 1 above. The Flexible Retirement procedures are detailed from page 21 onwards within the Flexible Retirement Guidance attached.

Timescales for the processing of a completed application by HSC Pensions were approximately 9 months in the first instance owing to the volume of interested staff. Documented in the Flexible Retirement Guidance.

3. What were the business reasons necessary for a manager to reject partial retirement?

- Burden of additional costs;
- Detrimental effect on ability to meet patient/ service user/ customer needs;

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- Inability to re-organise work among existing employees;
- Inability to recruit additional employees;
- Detrimental impact on quality;
- Detrimental impact on performance;
- Insufficient work for the periods the employee proposes to work;
- Planned structural changes.

Documented in the Flexible Retirement Guidance.

4. What was the escalation and appeal process to be invoked where the manager felt unable to facilitate the partial retirement request?

This escalation process is detailed in stage 2, page 24. The appeals process is detailed within stage 4, page 26. Please refer to the Flexible Retirement Guidance document attached for details.

5. Were staff prevented from partially retiring during this period?

No applications for 1995 scheme members were enabled or processed during this period by the Trust or HSCNI Pensions.