

**Flexible Retirement Guidance for HSC
Pension Scheme Members
BHSCT
December 2024**

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The definition of retirement is changing and broadening with many employees considering how they can gradually adjust their working patterns to achieve a healthy work-life balance and a smoother transition from their working life into retirement. This shift towards retiring flexibly leaves behind the expectation that retirement means permanently leaving the workplace, or that work should be immediately replaced with full time retirement.

Flexible working is just as valuable for employees approaching the end of their careers as it is for those joining the HSC for the first time or returning from parental leave.

HSC employers understand that our employee's lives are often demanding and complex. We recognise that the ability to flexibly retire is a key way to attract and retain a diverse workforce. It can positively impact on productivity, stress and absence levels, whilst improving working lives and supporting a culture of wellbeing across our workforce. Flexible retirements helps retain skilled staff by enabling employees to work flexibly, with improved wellbeing and financial security.

To support employees to access flexible working later in their careers, this guidance has been developed to provide an overview of the options available to employees who are members of the HSC Pension Scheme. Eligible employees can apply to retire flexibly using the application process set out in this guidance. Through the application of this guidance, managers will consider all requests for flexible retirement fairly and consistently, with due consideration given to service needs.

This guidance applies to all employees¹ who are members of the HSC Pension Scheme and is divided into three sections:

- Section A includes the types of flexible retirement is available, eligibility criteria and explores the benefits to the individual and organisation.
- Section B sets out the flexible retirement application process for partial retirement (draw down), wind down and step down, as well as guidance for managers considering applications.
- Appendices contain the flexible retirement application and a range of templates for managers and employees to use during this process.

¹ Agenda for Change, Medical and Dental and Senior Executive

This guidance:

- Will enable employees to understand the range of options available to access their pension and combine this with flexible working.
- Will enable managers to understand, promote and discuss flexible retirement options with employees.
- Sets out the expectations and requirements of employees and managers in pursuing and considering applications to access one of the flexible retirement options.
- Seeks to ensure that employees later in their careers will feel valued, rewarded and recognised for their experience, service and commitment.

Abatement is where a HSC pensioner's HSC pension is reduced or ceased if their earnings on remaining in or returning to work exceed the permitted amount.

Actuarially reduction is a reduction applied to an employee's pension and lump sum if they retire prior to the normal pension age of the relevant HSC Pension Scheme.

HSC Pension Scheme is a statutory occupational pension scheme. It is a defined benefit scheme and is based on membership during HSC employment and transfer values into the Scheme. There are two HSC Pension Schemes, the 1995/ 2008 Scheme and the 2015 Scheme. The 1995/ 2008 Scheme is closed to new entrants; however, some members retain the right to membership of this Scheme. The 1995/ 2008 Scheme is divided into two sections; the 1995 Section and the 2008 Section.

The 1995 Section closed to new members from 31 March 2008 and the 2008 Section closed to new entrants from 31 March 2015. All new entrants from 01 April 2015 join the 2015 Scheme.

Minimum pension age is the earliest age that you can draw your pension. This varies depending on which Section/ Scheme you are in and when you started pensionable employment.

Scheme/ Section	Minimum pension age
1995 Section	If you were an active member of this Section before 05 April 2006 and have not had a break of five years or more you may take your pension from age 50. If you were an active member of this Section before 05 April 2006 and have returned to this section after 05 April 2006 following a break of five years or more you may take your pension from age 55. If you were not an active member before 05 April 2006 you may take your pension from age 55.
2008 Section	Age 55
2015 Scheme	Age 55

Normal pension age is the age at which each member of the HSC Pension Scheme can retire and claim pension benefits without reduction. This age is defined by the Scheme or Section they are a member of as set out below:

Section/ Scheme	Normal pension age
1995 Section	Age 60 (Age 55 for Special Class and Mental Health Officer members)
2008 Section	Age 65
2015 Scheme	State Pension Age or age 65, whichever is later

Pensionable pay is broadly defined in the HSC Pension Scheme regulations as all salary, wages, fees and other regular payments. Non-pensionable payments include bonuses, non-regular payments, payments made to cover expenses or overtime and pay awards or increases which are expressed by the Department of Health to be non-consolidated.

Reckonable service is an employee's period(s) of previous direct employment with HSC/ NHS employer(s). It is used to calculate a number of payments, including sick pay, maternity pay, and annual leave an employee is entitled to in line with their terms and conditions of service.

Standard retirement pension is the amount of pension payable before an employee chooses to reduce their pension in order to receive a larger lump sum.

State pension age is the earliest age you can start receiving the State Pension. Further information, including an online calculator to check your State Pension age, is available on NI Direct (<https://www.nidirect.gov.uk/articles/check-your-state-pension-age>).

Section A: Flexible retirement options

What is flexible retirement?

Flexible retirement allows HSC employers and our employees to be flexible about:

- The age at which employees retire;
- The length of time employees take to fully retire; and
- The nature and pattern of work in the lead up to final retirement.

Retirement flexibilities allow employees to access their pension benefits while remaining in the Health and Social Care (HSC) workforce, with the option to build up further pension if they wish. This is a valuable part of the reward offer to attract and retain experienced staff who want to adjust their working pattern and manage their finances in the approach to retirement.

Benefits of flexible retirement

Retiring flexibly can support employees to retire gradually and work flexibly for longer, passing their skills and knowledge to colleagues, aiding succession planning and ensuring high quality care for patients and service users.

In turn, working flexibly improves work life balance for employees while accessing pension benefits supports financial wellbeing. This in turn can bolster staff health and wellbeing, reduce sickness absence and the risk of burn out, while strengthening retention and staffing levels over time.

Some of the specific organisational benefits are:

- **Attract and retain** experienced employees who want to adjust their working pattern and manage their finances leading up to retirement.
- **Succession planning** through employees retiring more gradually while passing on their skills and knowledge.
- **Continuity of high quality care** for patients and service users.
- **Reduction in recruitment and training time/ costs** by retaining valuable employees.
- Promotes the HSC as a great place to work by prioritising work-life balance.
- **Improves health and wellbeing** thereby reducing employee absence and the risk of burn out.
- **Attract staff** due to the flexibilities and competitive HSC Pension Scheme.

Applying for flexible retirement

Whilst an employee may be eligible to apply for one of the retirement flexibilities available through the HSC Pension Scheme (i.e. partial retirement, wind down, step down), all options require managerial approval. Therefore, it is essential employees discuss and agree their retirement plans with their line manager as soon as possible as it is anticipated the application process may take a number of months to work through.

Moreover, when applying for a type of flexible retirement that includes accessing pension benefits (i.e. partial retirement), employees must submit their completed retirement forms to their Human Resources Department at least 6 months prior to their retirement/ partial retirement date. Failure to meet this deadline may result in a delay in payment of your lump sum and/ or pension benefit on retirement/ partial retirement.

Therefore, employees wishing to partially retire are encouraged to submit their Flexible Retirement Application to their line manager **at least 9 months prior to their proposed retirement/ partial retirement date**. This will ensure there is adequate time for the various stages of the application process to be completed and allow successful applicants sufficient time to submit the necessary pension paperwork for processing. See Appendix 10, pages 42 – 43 for examples of the application timeline.

Please see Section B for further details on the application process.

The HSC Pension Scheme offers flexible retirement options to support the attraction and retention of experienced employees.

Employees contemplating flexible retirement should carefully consider their options and seek independent financial advice as necessary, before making any decision which could affect their pension position. Employees should ensure they read the relevant HSC Pension Scheme guide and relevant guidance documents and may wish to liaise directly with the HSC Pension Service to obtain information on their entitlements and benefits. Further information can also be found on the HSC Pension website (<https://hscpensions.hscni.net/>). It is important employees read this information to help make an informed decision.

All of the flexible retirement options below are available to members of the 1995 and 2008 Sections, as well as the 2015 Scheme. The information below sets

out the different types of flexible retirement (including eligibility criteria if applicable) and an example of how the flexibility works.

1. Partial Retirement (draw down)

What the flexibility offers

Employees who are active members of the HSC Pension Scheme can take from 20 per cent up to 100 per cent of their pension benefits, without having to leave employment.

To be eligible for partial retirement, an employee must:

- Be the minimum pension age for the relevant scheme; and
- Be an active member of the HSC Pension Scheme contributing towards their pension; and
- Reduce their pensionable pay by at least 10 per cent from their chosen partial retirement date; and
- Have a contractual change in their terms and conditions of employment to reflect their change in pensionable pay e.g. change of hours; and
- Maintain this reduction for the 12 months following their partial retirement date OR until the date of full retirement, whichever is sooner; and
- Have not already claimed partial retirement on two occasions.

Employees can partially retire twice before retiring completely. However, if the benefits are paid before normal pension age, the benefits will be actuarially reduced as they are being paid early.

Partial retirement can support employees to continue working whilst benefitting from being able to draw down their pension benefits and supplement their income ahead of full retirement. They may also continue to build up further benefits in the 2015 Scheme.

Impact on terms and conditions of service

To qualify for partial retirement, an employee must make a change to their contract of employment which results in at least a 10 per cent reduction in pensionable pay. The change made to fulfil this requirement will be a variation to their contract of employment. The rest of their terms and conditions remain the same.

In some circumstances, the employee and management may agree a temporary change to the employee's terms and conditions of employment, so that pensionable

pay is reduced only for a 12 month period. This will give both parties reassurance that at the end of that period, working arrangements will return to normal.

When available, employees who have partially retired and are considering a Voluntary Exit Scheme or any other HSC approved exit/ retirement scheme, should note that any calculation of retirement benefits under an approved exit scheme will be based on retirement benefits accrued after partial retirement plus any retirement benefits not taken on partial retirement.

Employees in receipt of long term protection of pay at the time of availing of partial retirement should note that partial retirement will not impact on their protected rate of pay which will be pro rata.

Partial retirement does not require the employee to have a break in service.

Pensionable pay

Definition of pensionable pay

As noted above, an employee must reduce their pensionable pay by at least 10 per cent to qualify for partial retirement. The HSC Pension Scheme regulations define pensionable and non-pensionable pay and there are some examples set out below:

Pensionable	Non-pensionable
• Basic salary • Unsocial hours enhancements (e.g. evenings, Saturdays, Sundays, Bank Holidays) • Wages • Fees • Other regular payments	• Medical & Dental Additional Programmed Activities • Overtime • Bonuses • Non-regular payments • Expenses • Payments determined to be non-consolidated by the Department of Health

Achieving a reduction in pensionable pay

Partial retirement is intended to facilitate a gradual move from work to retirement. Therefore, employees are required to reduce their pensionable pay by at least 10 per cent for 12 months on taking partial retirement. We understand that most employees, when presented with the ability to take some or all of their pension benefits, will be happy to reduce their hours or level of responsibility, and partially retire.

The most effective method to reduce pensionable pay will depend on the individual circumstances of the employee and their line manager. Options include:

- Reduction in hours;
- Change in level of responsibility e.g. changing to a lower paid role;
- Change in working pattern e.g. move from nights to days;
- Reduction in on-call commitment or change of on-call commitment to non-pensionable;
- For Medical and Dental staff, management responsibility allowances can be non-pensionable if they are temporary and subject to review or if they are linked to a non-pensionable additional programmed activity.
- Retention of current contractual arrangements (hours, grade) but the employee chooses to opt out of the HSC Pension Scheme for some elements of their pay. This will necessitate the creation of an additional Personnel ID/ Staff Number on the HR/ Payroll system to process the pensionable and non-pensionable pay elements separately.

The following are examples of means by which a 10 per cent reduction of pensionable pay cannot be achieved:

- Salary sacrifice arrangements;
- Term-time;
- Unpaid leave.

We understand that not all employees will want to reduce their hours immediately. Some employees may wish to take partial retirement but work the same total number of hours. In these cases, employees can make a change to their core contract and make some hours non-pensionable; please see below examples of how this could work in practice.

Example 1

A Doctor working 12 Programmed Activities (PAs) wishes to partially retire but maintain their work commitment. They apply to change to their contract so that they reduce the number of pensionable PAs in their core contract and opt out of the HSC Pension Scheme for the Additional Programmed Activities (APAs). The below illustrations shows how the contract may be adjusted in order to take partial retirement and reduce pensionable pay by 10 per cent:

12 PA contract prior to partial retirement

2 APAs (non-pensionable)

Core contract
10 PAs
(Pensionable)

12 PA contract after partial retirement

3 APAs (non-pensionable)

Core contract
9 PAs
(Pensionable)

Example 2

A Senior Nursing Assistant works 37.5 hours per week. They wish to draw down their pension benefits whilst retaining their pay. They apply to change their contract to reduce their core contract to 30 hours per week (pensionable). They work 7.5 hours per week under a separate contract and opt this contract out of the HSC Pension Scheme.

37.5 hours per week contract prior to partial retirement

Core contract
37.5 hours per week
(Pensionable)

37.5 hours per week contract after partial retirement

Additional contract 7.5 hours per week (opted out of the HSC Pension Scheme)

Core contract
30 hours per week
(Pensionable)

For members in receipt of Clinical Excellence Awards (medical and dental employees only), a pensionable and consolidated pre-2018 award cannot be changed to become non-pensionable and non-consolidated. They may choose to

relinquish their award to achieve the 10 per cent reduction. Relinquished national and local awards will not be automatically reinstated. Awards cannot be paused or temporarily withdrawn for a year to fulfil the 12 month requirement for the 10 per cent reduction following partial retirement.

To partially retire, the HSC Pension Scheme regulations require a reduction in pensionable pay as a result of a change in the employee's terms and conditions of employment. However, the regulations do not necessarily require a reduction in overall take home pay. In cases where it is agreed the employee should continue to work in the same role, with no reduction in working hours, commitments or responsibilities, the employer and employee may review the structure of the employee's remuneration to identify if some elements of pensionable pay could be determined as non-pensionable in line with HSC Pension Scheme regulations

Monitoring reduction in pensionable pay and abatement

The reduction must stay in place for at least 12 months following the date partial retirement is taken. The employee will no longer be eligible if the reduction is breached and their pension payments will be stopped until their pensionable pay reduces again. It is the employee's responsibility to ensure their pay remains at least 10 per cent lower than their previous pay for the 12 months from their partial retirement date.

In the 12 months following partial retirement, a member must consider any elements of their pay which could lead to a breach of their permitted pensionable pay earnings, including but not limited to:

- Changes in working patterns which attract pensionable payments (i.e. unsocial hours);
- Claiming any additional hours worked as pensionable rather than non-pensionable;
- Taking up a promotional post;
- Receipt of pensionable allowances; and
- The cancellation or cessation of a salary sacrifice arrangement.

The HSC Pension Service will also monitor pensionable pay in the 12 months following partial retirement.

Multiple HSC Employment

Where an employee has more than one employment which is actively contributing to the HSC Pension Scheme, they must reduce their combined pay across all pensionable employments by at least 10 per cent.

For example:

- Employment 1, Organisation A = £25,000
- Employment 2, Organisation B = £15,000
- Total pensionable pay = £40,000

A reduction is required so that the overall pensionable pay is no more than £36,000. This can be achieved by varying one employment or both. An employee may choose to leave one of their employments to achieve the 10 per cent reduction.

It is the employee's responsibility to ensure there is the 10 per cent reduction in pensionable pay for at least 12 months across all employments which contribute to the HSC Pension Scheme.

Locum or Bank Workers

For those who work sporadically as a locum or bank worker, the 10 per cent reduction in pensionable pay is calculated in the same way as other employees. The reduction will be calculated based on the employee's previous level of pensionable pay for the 12 months before they take partial retirement. Where an employee has more than one employment, they must reduce their combined pay across all pensionable employments by at least 10%.

The McCloud remedy

The McCloud remedy has been put in place following a legal case ruling (McCloud) and is the process of removing age discrimination that was judged to have arisen in public service pension schemes, including the HSC Pension Scheme.

Employees who joined the HSC Pension Scheme on or before 31 March 2012 and who are still members of the Scheme on 01 April 2015 are eligible for the McCloud remedy. If considering partial retirement, it is important that employees understand their position in respect of the McCloud remedy.

As part of the McCloud ruling, affected employees have had their pensionable service for the McCloud remedy period – 01 April 2015 to 31 March 2022 – put back into the 1995/ 2008 Sections of the Scheme. For affected employees who partially

retire, HSC Pension Service will contact them prior to their retirement/ partial retirement date and ask them to choose between keeping these benefits in the 1995/ 2008 Sections or taking 2015 Scheme benefits for the remedy period instead. When it comes to making this choice, the part of the Scheme that's better for an employee could be different depending on how long they continue to work after they have taken partial retirement. An employee's McCloud choice means there are other factors to consider when deciding what percentage of their pension to take at partial retirement, as it could affect their tax position, or final salary link, if they have one. And if an employee later chooses to take 2015 Scheme benefits for the remedy period, you may have lump sum overpayments to pay back.

Further information about partial retirement and the McCloud remedy is available on the HSC Pension Service website and the Members Factsheet contains specific information regarding this with links to modelling tools to support your decision.

Reckonable service

Reckonable service for the purposes of redundancy is set out in the relevant terms and conditions of service for Medical, Dental, Agenda for Change and Senior Executive employees. Where an employee has previously been given pension benefits, any employment that has been taken into account for the purposes of those pension benefits does not count as reckonable service.

HSC Pension Scheme Partial Retirement Calculator

The HSC Pension Scheme has developed a partial retirement calculator which gives a basic illustration of projected pension benefits at partial retirement, including projected salary income and remaining pension available after partial retirement. This calculator can be accessed on the HSC Pension Service website (<https://hscpartialretirementcalculator.co.uk/>).

Example: Mark is aged 55 and works 37.5 hours per week. He has 20 years' service in the 1995 Section. He plans to reduce his hours to 27 per week. As he is partially retiring prior to normal pension age, reduction to benefits payable will apply.

- Mark's gross pensionable pay for the 12 months preceding partial retirement date is £32,934.
- By reducing his hours by 10.5 per week, his pensionable pay drops to £23,712 which meets the requirement for at least 10 per cent reduction.
 - He claims 100 per cent of his 1995 Section pension and lump sum which equates to an annual pension of £8,233 and lump sum of £24,700

- His total gross income from pensionable pay and pension benefits combined is £31,945.
- Mark continues to work and build up further benefits in the 2015 Scheme.

Benefits for the employer

- Retention of Mark's skills and experience whilst will bolster workforce capacity, service delivery and succession planning.

2. Step Down (i.e. into a lower band post)

What the flexibility offers

Employees may step down to a different role, for example, to reduce the level of responsibility while remaining in HSC employment. The ability to step down is dependent on a suitable role being available and subject to the application process set out in Section B.

This helps an employee change the intensity of work on the approach to retirement and supports the organisation to retain the individual's skills and experience.

Some members opting to step down may be eligible to have their higher level of pensionable pay protected, which might mean their final salary benefits are not affected. For further information, please contact the HSC Pension Service.

Example: Yusuf is aged 58 and works full time as a Mental Health Team Lead Band 7. He is a registered mental health nurse and leads a team providing mental health support for patients and service services at home and in clinics. He has line management responsibility for the members of his team. In addition to managing the care of his own patients, he is responsible for the quality of care provided by this team and provides guidance, advice and assistance on their assessments and referrals.

Why they have decided to retire flexibly

In the lead up to full retirement, Yusuf would like to spend more of his working time providing hands-on care to patients and less time on line management and paperwork. Yusuf decides to step down to a less pressured and demanding role in the hope of achieving a better work life balance. He is keen to ensure the drop in responsibility does not affect his final salary pension and the scheme has the flexibility to protect his final salary at the point of stepping down.

Benefits for the employer

Facilitating Yusuf's step down has created promotional opportunities for others. The employer has retained an experienced staff member and strengthened workforce capacity. Yusuf will pass on his skills to others, supporting continuity of care to patients. Enabling Yusuf to refocus on work he is passionate about will improve his job satisfaction, productivity and helps makes the HSC a great place to work.

3. Wind Down (reduction in working hours/days)

What the flexibility offers

Employees can wind down to retirement by remaining in their current post but reducing the number of hours or days they work. The ability to wind down is subject to the application process set out in Section B.

Reducing working commitments will reduce pensionable pay resulting in a lower pension building up in the 2015 Scheme in the future compared to working full-time. However, any final salary benefits earning in the 1995 or 2008 Sections will continue to be based on whole-time equivalent pensionable pay and protected from changes in working patterns.

This option may be used where the employer wishes to retain the particular experience and skills within the team, but the individual wishes to reduce their hours as they approach retirement. This may support the employee to remain in work for a longer period of time before retirement.

Example: Caoimhe is aged 56 and works full-time with 12 programmed activities as a Consultant in Emergency Medicine.

Why they have decided to retire flexibly

Caoimhe is considering their retirement options and is looking at winding down and reducing their hours in the lead up to full retirement. Caoimhe would like to explore activities outside of work and spend more time with family and friends.

Benefits for the employer

By assisting Caoimhe to wind down, the organisation has supported succession planning by retaining skills and experience which can be passed on to other staff. Retaining Caoimhe has also reduced the time and costs of recruitment and training.

Retire and Return

HSC employers may have a retire and return scheme which provides an opportunity for employees to retire from their employer and return to work, either in their current role/ an alternative vacant post and/ or reduced hours, after a designated break.

Applications to return to work following retirement will not be automatically approved and should take account of current and future workforce requirements, succession planning and equality requirements.

Employees interested in applying for retire and return opportunities should contact their HR Department for information on whether this flexibility is available within their organisation.

What the flexibility offers

Employees who have reached the minimum pension age may leave HSC employment, claim all of their pension benefits and return to HSC employment. Employees have the option to join the 2015 Scheme on returning to work in the HSC, to carry on building up more pension if they wish.

Employees wishing to retire and return must agree the arrangement with management prior to retiring.

Example: Susan is aged 57 and works 37.5 hours per week as a Community Dental Officer.

Why they have decided to retire flexibly

Susan wants to spend more quality time with family and friends, and explore other projects outside of work. They decide to retire from their role but are concerned about going from full time work to full time retirement. Susan is keen to retire and return to their role on a part-time basis for 12 months. Susan returns working two days a week, whilst receiving their pension benefits and saving further pension for final retirement.

Benefits for the employer

By supporting Susan to retire and return, her employer has retained the skills of an experienced member of staff who will pass knowledge on to others and improve workforce capacity.

Pensionable re-employment (retire and re-join)

From 01 April 2024, employees who have taken their pension from the 1995 Section of the HSC Pension Scheme and return to work in the HSC can join the 2015 Scheme and build up further pension if they wish.

From July 2024, eligible HSC employees have been automatically enrolled into the 2015 Scheme on the first day of their employment, in the same way as any other new start.

Employees who retired and took their benefits from the 1995 Section and returned to work before July 2024 are eligible to join the 2015 Scheme from if they wish.

Employees must complete the relevant HSC Pension Scheme Form to join the Scheme and return it to Human Resources for onward processing to BSO Payroll Service Centre. Opting in to the HSC Pension Scheme cannot be applied retrospectively and will be from the start of the next available pay period after the application form has been processed. All HSC Pension Forms are available on the HSC Pension Service website (<https://hscpensions.hscni.net/>).

Transfer of benefits to the HSC Pension Scheme

Where an employee chooses to end their membership to an alternative pension arrangement and join the 2015 Scheme, they may wish to transfer their benefits from the alternative pension arrangement in to the 2015 Scheme.

The ability to transfer benefits to the HSC Pension Scheme is time-limited from the start date of your employment; further information is available from HSC Pension Service (<https://hscpensions.hscni.net/hsc-pension-scheme/hsc-pension-members-section/transferring-benefits-in-or-out-hsc/>).

Early retirement reduction buy-out (ERRBO)

ERRBO is part of the 2015 Scheme. Employees who are members of this Scheme can pay additional contributions to buy out, or reduce, the actuarial reduction that would be applied to their pension were they to retire before their normal pension age.

Further information on ERRBO is available on the HSC Pension Service website (<https://hscpensions.hscni.net/hsc-pension-scheme/hsc-pension-members-section/increasing-your-benefits-additional-pension-added-years-errbo/>).

Section B: Flexible Retirement Applications

This section sets out the application process for those wishing to **partially retire, wind down or step down**. Those interested in applying for retire and return should apply on HRPTS see Appendix 8 also, complete the Application Form in Appendix 1

Whilst an employee may wish to retire flexibly, it requires managerial approval. When discussing a flexible retirement application, an employee and their line manager must consider the impact this will have on the service, as well as the potential benefits for the employee and organisation. Moreover, the manager and employee should discuss and record in full the intentions of the employee including whether or not there is a clear indication of their date of final retirement from the service.

Non-attendance at meetings

Should an employee fail to attend a meeting to discuss their application (Stage 1 or 2) or appeal (Stage 4) and one further re-arranged meeting without explanation, the application will be considered withdrawn. In these circumstances, the manager dealing with the application/ appeal must inform the employee in writing that the application/ appeal has been withdrawn and provide the employee with an opportunity to respond.

Stage 1: Formal application and initial exploration

Making an application

To make a request for flexible retirement employees should;

1. Apply on HRPTS using ESS and apply for flexible retirement and utilise the free form notes section to state this is for partial retirement and confirm which option they are requesting i.e.

1) partial retirement (draw down) 2) step down 3) wind down 4) retire and return

And

2. Complete the hard copy application form in Appendix 1 and submit to their line manager. However, the request will not be formally considered until it is put into writing. If a manager refuses or is not receptive to an informal discussion, an employee may still decide to proceed with a formal application. Employees may wish

to seek advice and guidance from their HR Department or trade union prior to submitting an application.

Considering a request

All applications should be approached with a can-do attitude, with the presumption that they will be granted unless it is genuinely not possible to do so for one of the business reasons set out below. The request should be considered carefully and the benefits of implementing the change should be weighed against any costs. Managers should consider each application on a case by case basis, using their judgement and discretion to work with the employee to consider compromises if necessary to arrive at a mutually agreeable outcome. The flexible retirement plan agreed for one individual does not mean that a similar plan must be agreed for another. Decisions will be taken based on the merit of each case at a point in time and in consideration of the timescales of overall final retirement plans of individuals concerned.

Responding to an application

Managers should be aware that there is a legal requirement to consider flexible working applications and inform the employee of the outcome within specific timeframes set out in this guidance. Moreover, managers are required to give all requests for flexible retirement serious consideration and to consider alternative possibilities if the request cannot be accommodated.

The line manager should meet with the employee to consider their request within 20 days of receipt of the request. If this is not possible, the line manager should seek the employee's agreement to extend the period. This meeting can be in person, virtually (i.e. MS Teams) or by telephone. The employee has the right to be accompanied by a work colleague or Trade Union representative should they wish.

At the meeting, the manager and employee should discuss the content of the application so the manager can understand the changes being requested and how the employee sees things working in practice. The discussion should explore the proposed arrangements, any potential positive and negative impacts it may have on service provision and how it may affect other team members. During this meeting, the employee and manager should consider all options to meet the request outlined on the application, giving due consideration to compromises and alternatives which may be available. A discussion should also take place regarding the employee's retirement plans including their intention to fully retire.

To support and facilitate flexible retirement requests, it may be beneficial to 'reshape' the role the employee currently undertakes. For example, it may be the case that an

employee wishes to partially retire and reduce their working hours from 5 days per week to 3 days in an area where there are significant skills shortages. Rather than reject the application it may be prudent to explore a changing role as part of the retirement plan so that the individual nearing retirement focusses on mentoring and coaching the next generation. Consideration should be given to changing/ reshaping tasks where appropriate as long as they remain within the substantive banding at which the employee is paid and within overall service budgets. In all cases early and detailed discussions should take place and any decisions recorded as part of the application process.

Managers must consider whether the request is in relation to a reasonable adjustment related to a disability or another protected characteristics; employees are encouraged to identify where this is the case during the application process. Additionally, managers should consider any health and safety issues that might result from the change and identify ways to mitigate them (i.e. if the working arrangements will mean the employee or other team members would become line workers). Advice can be sought from HR, Health and Safety and Occupational Health as appropriate.

If the request is approved or an alternative arrangement agreed at this stage, management should proceed to Stage 3, page 24.

A flexible retirement application can only be refused where there is a clear business reason. The business ground(s) on which the application could be refused are:

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

If the request is unlikely to be accommodated or rejected, management should immediately proceed to the Escalation Stage. It is important to note that decision in relation to the flexible retirement request must be confirmed in writing to the employee by the line manager within 10 days from the date of the meeting. This is inclusive of the Escalation Stage.

Stage 2: Escalation

Where a line manager feels they are unable to facilitate the individual's request, the Escalation Stage must be invoked. The purpose of this stage is to check for other possible solutions including whether the form of flexibility the employee is seeking could be accommodated in a different team, location or role.

To invoke the Escalation Stage, the line manager should complete Part 2 of the Flexible Retirement Application Form, ensuring all relevant information concerning the request, alternatives considered and the business reason(s) why the request cannot be accommodated is provided. The full application form (Parts 1 and 2) should be forwarded to the relevant Senior Manager (the Escalation Manager) for consideration.

It will be up to each manager to ensure that the Escalation Stage is considered by an appropriate and more senior manager who has the authority to approve the request within their area of responsibility. The Band/ Grade of the employee seeking to flexibly retire will determine who should be involved in this process.

The Escalation Manager is responsible for considering the Flexible Retirement application across their area of responsibility. They should consider if the request cannot be granted within the employee's current role or team, could this be accommodated in another team that the Escalation Manager has responsibility for.

The Escalation Manager may wish to arrange a meeting with the employee to discuss their application. An employee has the right to be accompanied to this meeting by a Trade Union representative or work colleague.

The Escalation Manager should keep a record of what efforts were made to accommodate the request and the rationale for same should a request be declined.

The Escalation Manager is responsible for completing the Escalation Form ([Appendix 2](#), page 33) and returning this to the line manager to communicate the decision to the employee regarding their Flexible Retirement Application.

No matter if the request is granted or rejected at the Escalation Stage, the line manager should move to Stage 3.

Stage 3: Decision/ Outcome

The decision in relation to the flexible retirement request must be confirmed in writing to the employee by the line manager and or escalation manager within 10 working days from the date of the meeting.

Request approved

The line manager should complete the relevant Stage 3: Flexible Retirement Application Outcome Form – Approved (Appendix 3, page 34). When agreeing the commencement date of the arrangement, the line manager and employee should take into consideration the timescale for retirement applications to be processed (see Applying for flexible retirement and Appendix 10, pages 42 – 43 for timeline examples).

If applying for partial retirement or retire and return, the employee is responsible for completing the relevant HSC Pension Scheme Form and submitting this to Human Resources. Scheme Forms are available at on the HSC Pension Service website (<https://hscpensions.hscni.net/hsc-pension-scheme/scheme-forms/>). The completed retirement application, along with approved Flexible Retirement Application Form, Partial Retirement Supplementary Form (if applicable) and any associated documentation, should be with Human Resources **no later than 6 months prior to the proposed retirement/ partial retirement date.**

The line manager is responsible for completing the relevant pay processing paperwork (e.g. contractual change, new start, leaver, internal/ org move) and sending this Human Resources. An employee's retirement application cannot be progressed until the relevant paperwork is received from the manager. Therefore, **line managers must ensure this paperwork is with Human Resources no later than 6 months prior to the agreed retirement/ partial retirement date.**

Failure by the employee and/ or line manager to have the relevant documentation to Human Resources at least 6 months prior to the agreed start date of the flexible retirement arrangement may result in a delay to pension benefits being paid to the employee.

All documentation relating to a flexible retirement application must be retained by the manager in line with the organisations Retention and Disposal of Records Policy. A copy of documentation should also be given to the employee.

Request declined

If the flexible retirement request remains rejected following the escalation process, the line manager or escalation manager should provide the reason(s) to the employee in writing using the form in [Appendix 4](#) (Stage 3: Flexible Retirement Application Outcome – Declined, page 35).

The line manager must provide clear rationale for their decision, including the objectively justifiable reason(s) for this decision, along with an account of any alternatives considered by the line manager at Stage 1 or the Escalation Manager at Stage 2.

As a flexible retirement application can be refused only where there is a clear business reason, the line manager must detail in writing:

- Which of the listed business ground(s) apply and have led the application to be rejected;
- An explanation of why the business reason(s) apply in the circumstances. A sufficient explanation:
 - Explains why the business ground(s) is relevant and why the request cannot be accepted.
 - Is easy to understand and avoids the use of unfamiliar jargon.
 - Includes relevant and accurate facts.
 - Is not overly complex or unnecessarily long.
- Set out the appeal procedure including the appropriate senior manager who has not been previously involved at Stage 1 or 2 who will consider the appeal; and
- Ensure the written notice is dated.

Stage 4: Appeals Process

The employee can request for the decision to be reviewed on the following grounds:

1. The procedure within this guidance has not been properly followed;
2. All available options have not been fully considered;
3. New information in relation to the application is now available.

This appeal must be lodged with the appropriate senior manager who has had not previously involvement in the application (i.e. at Stage 1 or Stage 2) Pensions Flexibilities Team, HR by e-mailing: **HRRETIREMENTS-SM** within 10 working days of receipt of the initial outcome. The employee should complete the Flexible Retirement Appeal Form in [Appendix 5](#), page 36. Employees should note a Trade Union representative can provide support when completing the appeal form.

An appeal meeting must be held within 10 working days of receipt of the appeal form, and the final outcome issued within 10 working days of the appeal meeting.

Employees have a right to be accompanied by a Trade Union representative or work colleague during the appeal meeting.

During the appeal process, the senior manager should consider:

- If the process was followed appropriately.
- If all suitable options have been fully explored and considered.
- Is there new information regarding the application now available which was available when the initial decision was made?

The senior manager considering the appeal may wish to seek advice and guidance from their Human Resources department.

The senior manager should use the relevant Flexible Retirement Reply Form depending on the outcome of the appeal; Appendix 6, page 37 should be used if the appeal is upheld and Appendix 7, page 38 if the appeal is rejected.

A written notice of the appeal outcome constitutes the employer's final decision and is effectively the end of the formal procedure within the workplace.

Recording on HRPTS

All employee requests for flexible retirement must be made via :

1. HRPTS. (request for flexible working)
- And**
2. Completing the relevant hard copy application form

For those employees who do not have access to HRPTS, fully completed application forms should be forwarded by the line manager via email to **HRRETIREMENTS-SM**

Employees can refer to Appendix 9, pages 42 – 43 for a step-by-step guide on how to submit a request through HRPTS.

Line managers should action requests submitted via HRPTS, whether accepted or rejected, within 3 days.

Employee

If applying for partial retirement or retire and return, the employee is responsible for completing the relevant HSC Pension Scheme Form(s). For both partial retirement and retire and return, employees will need to complete an AW6 Pension Application Form. Those partially retiring will also need to complete a HSC Pensions Partial Retirement Supplementary Form. Both forms are available on the HSC Pension Service website (<https://hscpensions.hscni.net/hsc-pension-scheme/scheme-forms/>).

The completed AW6 Pension Application Form, along with approved Flexible Retirement Application Form, Partial Retirement Supplementary Form (if applicable) and any associated documentation (i.e. birth certificate), should be with Human Resources by e-mailing **HRRETIREMENTS-SM no later than 6 months prior to the proposed retirement/ partial retirement date.**

Line manager

The line manager is responsible for completing the relevant pay processing paperwork (e.g. contractual change, new start, leaver, internal/ org move) and sending this to Human Resources. An employee's retirement application cannot be progressed until the relevant paperwork is received from the manager. Therefore, **line managers must ensure this paperwork is with Human Resources no later than 6 months prior to the agreed retirement/ partial retirement date.**

Failure by the employee and/ or line manager to have the relevant documentation to Human Resources at least 6 months prior to the agreed start date of the flexible retirement arrangement may result in a delay to pension benefits being paid to the employee.

Human Resources

Once all required information has been received, including the relevant paperwork from the line manager (e.g. leaver form, contract change form), HR will complete the relevant sections of the AW6 Pension Application Form and Partial Retirement Supplementary Form (if applicable). They will then forward the paperwork to BSO Payroll Service Centre and HSC Pension Service to action at least 4 months prior to the retirement/ partial retirement date.

HSC Pension Service

The HSC Pension Service will progress the retirement application. If the application has been received on time HSC Pension Service will write to the employee during the month of their retirement/ partial retirement to advise on pension benefits payable and the date payment(s) should be expected.

Applications are only considered on time if:

- The fully completed AW6 Pension Application Form, HSC Pensions Partial Retirement Supplementary Form (if applicable) is submitted to HR at least 9 months in advance of the retirement/ partial retirement date and is accompanied by all relevant documentation for the employee (i.e. birth certificate) and line manager (i.e. leaver form, contract change form); **AND**
- HR complete their sections and forward the form(s) to HSC Pension Service and BSO Payroll Service Centre at least 4 months prior to the retirement/ partial retirement date.

Failure by the employee, line manager or HR to adhere to the above deadlines may result in a delay to pension benefits being paid to the employee.

Part 1 – To be completed by employee

Name		Personnel ID	
Job Title		NI Number	
Line Manager			
Describe your current working pattern (e.g. days/ hours/ times worked/ nights only)			

What type of flexible retirement are you applying for? (If you are unsure about these choices, please refer to guidance document)	
☐	Partial retirement (draw down) – <i>complete Sections 1.A, 1.B & 1.F</i>
☐	Step down – <i>complete Sections 1.A, 1.C & 1.F</i>
☐	Wind down – <i>complete Sections 1.A, 1.D & 1.F</i>
Date I would like to flexibly retire from	
NB: partial retirement applications should be submitted at least 9 months prior to your intended partial retirement/ retirement date	

If the reason for the application is in relation to a protected characteristic* or as a request for consideration of a reasonable adjustment under the Disability Discrimination Act, please provide further detail below. Please also provide any additional information to support your application.
* Protected characteristics include: age, gender, race, sexual orientation, disability, caring responsibilities, marital status, religious belief and political opinion.

Section 1.B: Partial retirement (draw down)

By applying for partial retirement you confirm:

- You will change your contractual arrangements to reduce your pensionable pay by a minimum of 10%.
- You will maintain this reduction in pensionable pay for the 12 months following their partial retirement date OR until the date of full retirement, whichever is sooner.
- You are the minimum retirement age at your proposed partial retirement date.
- You are an active member of the HSC Pension Scheme.
- You understand it is your responsibility to ensure you meet the requirements for partial retirement and if you do not maintain these, you will be subject to abatement and your pension benefits in payment will be reduced/ stopped.
- You have not partially retired more than once prior to this application (partial retirement can only be taken twice).
- You understand you will vary your contract of employment if your application is approved.
- Any service taken into consideration for claiming pension benefits does not count as reckonable service in the event of redundancy.

How do you plan to reduce your pensionable earnings by a minimum of 10%?
Please check all boxes that are relevant and provide details of your proposed change(s) (e.g, reduction of hours from 37.5 hours to 30 hours)

Type of change		Details of proposal	
		Current	Proposed
Example: Reduction in hours/PAs	☒	37.5 hours	30 hours
Reduction in hours/ PAs	☐		
Change in pay band/ grade	☐		
Change in working pattern (e.g. from nights to days)	☐		
Reduction in on-call commitment OR change of on-call to non-pensionable	☐		
Retain hours/ PAs and current responsibilities but convert some elements of pensionable pay to non-pensionable (Please specify which elements are to be pensionable/ non-pensionable in the 'Proposed' column)	☐		

Is this a permanent or temporary change to your contract?

Permanent	☐		
Temporary for a minimum of 12 months from partial retirement date	☐	Proposed end date of temp arrangement?	

Please go to Section 1.E

Section 1.C: Step down

Please provide details of the role you wish to step down to

Job title	Pay band (AfC only)	Location	Weekly hours/ PAs

Please go to Section 1.E

Section 1.D: Wind down

Current working hours/ PAs	
Proposed working hours/ PAs (working pattern to be discussed at meeting)	

Please go to Section 1.E

Signed		Date	
Print name			

Please submit this form to your line manager. Continue on a separate page if necessary.

Part 2 – To be completed by manager

The manager should meet with the employee within 20 working days of receiving the completed application form and complete their part of the form.

Name	
Job title	
Date application received	

The initial decision reached is that:		
The request (or another agreed alternative) can be accommodated	☐	Proceed to 2C
The request required further escalation	☐	Proceed to 2B

Rationale for not being able to support the request within the current team/ ward/ department.	
Detail what alternative options have been explored and why these have not been deemed feasible.	

Signed	
Date	

If the request requires escalation, the line manager should sign above and submit this form to their appropriate senior manager.

Part 3 – To be completed by senior manager following escalation

Name	
Job title	
Date escalation received	

Escalation review

Do you uphold the line manager's decision that the request cannot be accommodated?

☐ Yes

☐ No

Please provide the rationale for this decision

--

Please list the alternative arrangements you have explored and specifically if any of these arrangements would be suitable

--

Please specify the outcome of the escalation review

☐ The request (or another agreed alternative) can be accommodated

☐ The request (or an alternative) cannot be accommodated

Signed	
Date	

The senior manager should complete the escalation review and return to the employee's line manager to complete Stage 3.

If the flexible retirement request remains rejected following the escalation process the line manager should provide the reasons to the employee in writing using the rejection form.

You must write, with your decision, to your employee within 10 working days following the meeting.

Dear

Following receipt of your application and our meeting on ,
I have considered your request for flexible retirement.

I am pleased to confirm that I am able to accommodate your application	☐
I am unable to accommodate your original request. However, I am able to offer an alternative which we have discussed and you agreed would be suitable to you.	☐

Your new working arrangement will be as follows:

--

Your new working arrangement will commence on .

Your new working arrangements are a change to your contract of employment.

If you have any questions on the information provided on this form please contact me to discuss them as soon as possible.

I understand that you have separate paperwork to complete to access your pension benefits. Further information and the relevant forms are available on the HSC Pension Service website (<https://hscpensions.hscni.net>).

I can confirm that I have completed the relevant pay processing paperwork to inform Human Resources of any contractual or pay affecting changes.

Signed		Date	
---------------	--	-------------	--

You must write, with your decision, to your employee within 10 working days following the meeting (please note this timeframe includes the escalation stage). This form can be completed by you when declining an application. Before completing this form you must ensure that full consideration has been given to the application. You must state the business ground(s) as to why you are unable to approve the flexible retirement application and the reasons why the ground(s) applies in the circumstances.

Dear

Following receipt of your application and our meeting on ,
I have considered your request for flexible retirement.

If you are unhappy with the decision, you may appeal against this decision. Please complete the Flexible Retirement Appeal Form and submit this, along with your Flexible Retirement Application, to Name of senior manager, Job Title within 10 calendar days of receiving written notice that your flexible retirement application has been turned down.

Signed

Date

If your application has been refused you may appeal against your manager's decision. You can use this form to make your appeal. You should set out the grounds on which you are appealing and do so within 10 calendar days of receiving written notice that your flexible retirement application has been turned down.

Along with this form, you should submit your original Flexible Retirement Application to your senior manager.

You have 10 working days following receipt of this form to arrange a meeting with the employee to discuss their appeal.

Dear

I wish to appeal against the decision to refuse my flexible retirement application. I am appealing on the following ground(s)

- ☐ The procedure for flexible retirement has not been properly followed
- ☐ All available options have not been fully considered

Supplementary information to support my appeal is set out below

Signed

Date

You may complete this form when you are upholding a Flexible Retirement Appeal. You must return this form to your employee, giving notice of your decision, within 10 working days after the meeting at which you both discussed the appeal.

Dear

Following receipt of your appeal and our meeting which took place on , I have considered your appeal against the decision to refuse your application for flexible retirement.

I have upheld your appeal against the decision and my decision regarding your flexible retirement application is set out below.

I am pleased to confirm that I am able to accommodate your application	☐
I am unable to accommodate your original request. However, I am able to offer an alternative which we have discussed and you agreed would be suitable to you.	☐

Your new working arrangement will be as follows:

--

Your new working arrangement will commence on and is a change to your contract of employment.

I have confirmed this arrangement with your line manager who will now complete the relevant pay processing paperwork to inform Human Resources of any contractual or pay affecting changes.

I understand that you have separate paperwork to complete to access your pension benefits. Further information and the relevant forms are available on the HSC Pension Service website (<https://hscpensions.hscni.net>).

Please note, this is the end of the appeal process.

Signed		Date	
---------------	--	-------------	--

You may complete this form when you are rejecting a Flexible Retirement Appeal. You must return this form to your employee, giving notice of your decision, within 10 working days after the meeting at which you both discussed the appeal. As you have decided to turn down the appeal, you must state the grounds for your refusal.

Dear

Following receipt of your appeal and our meeting which took place on _____, I have considered your appeal against the decision to refuse your application for flexible retirement.

Please note, this is the end of the appeal process.

Signed

Date

All employees making a flexible retirement request must:

1. Apply on HRPTS

And

2. Complete the Application Form in Appendix 1 and email to your line manager

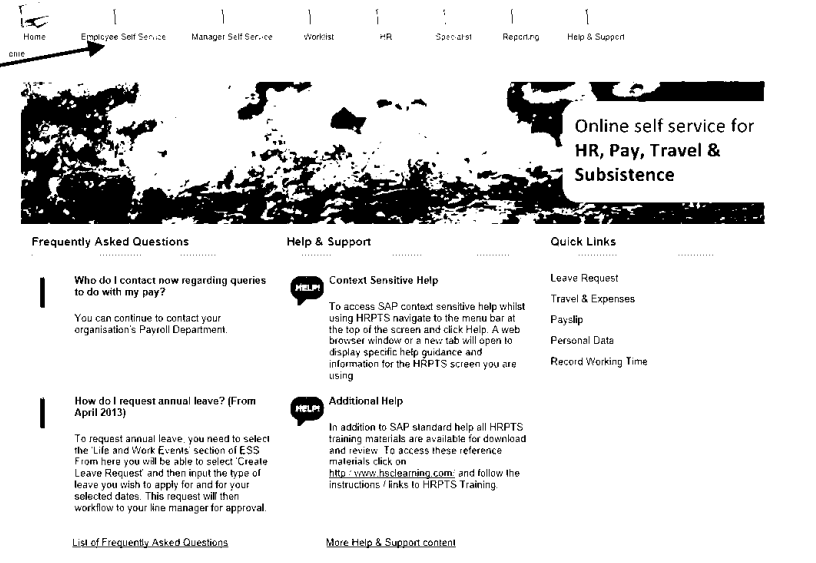
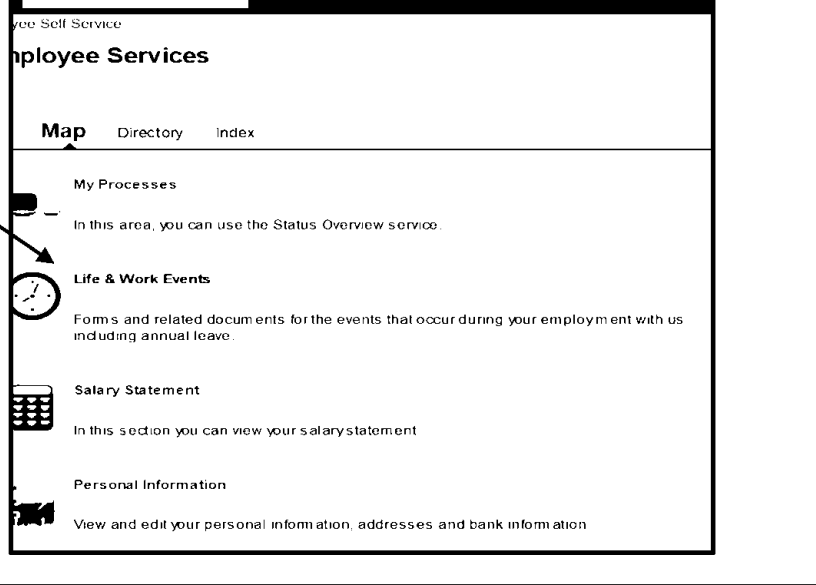
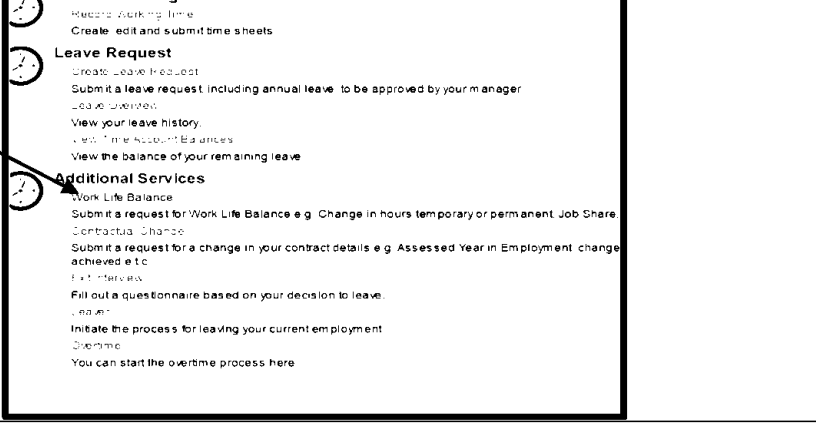
Apply via HRPTS

- Select '**Life and Work Events**' in Employee Self Service Portal
- Under Additional Services, select '**Work Life Balance**'
- A PDF form will open, complete all fields and select '**Next**' (please select 'Flexible Retirement' from the dropdown for type of WLB Request)
- Complete Proposed Work Pattern section i.e. "Draw Down"
- Once you are sure the form has been completed correctly select '**Send**' to forward to your approver.

Line Managers, Please note: e-mail HRRETIREMENTS-SM

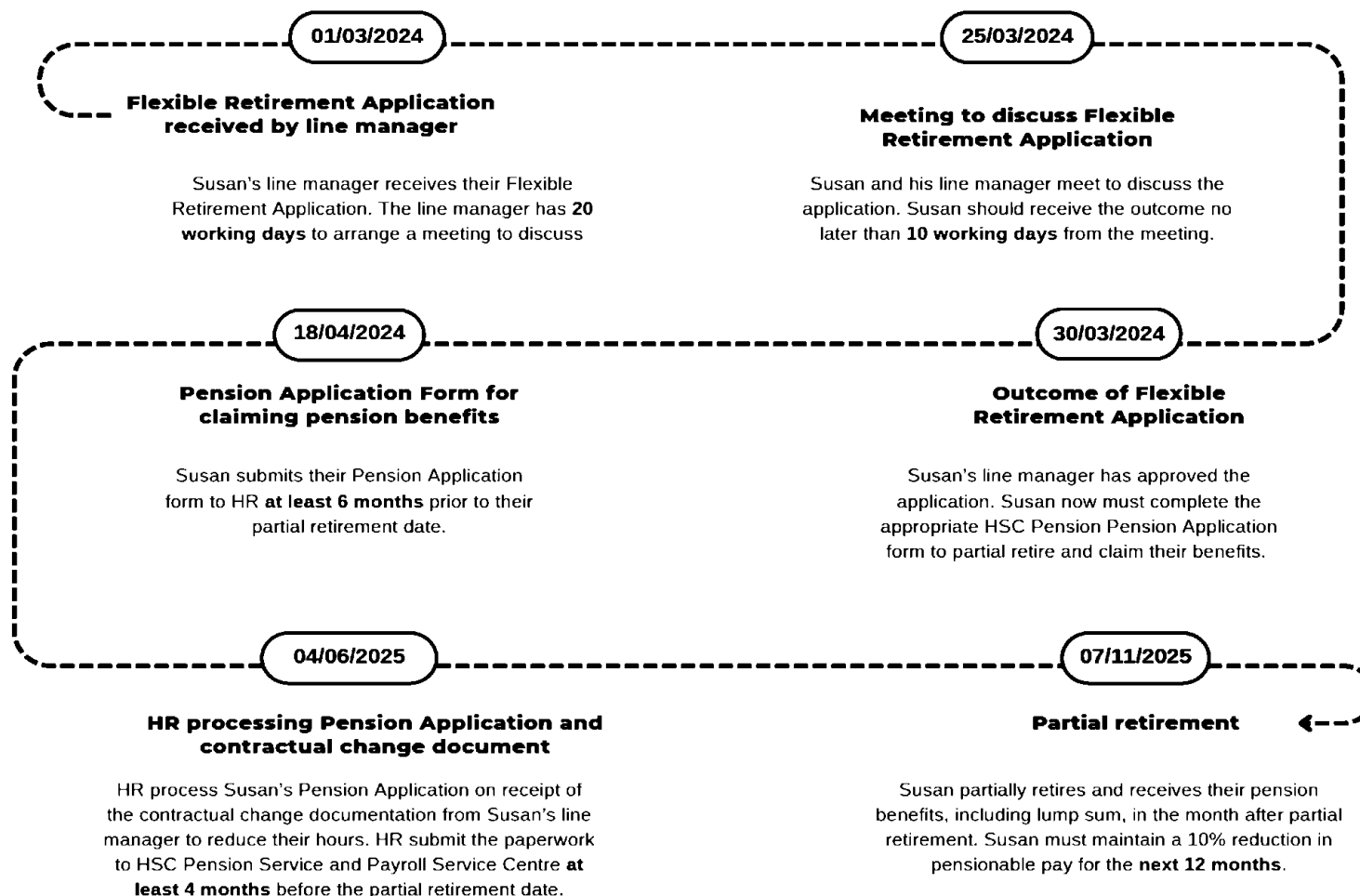
The flexible working request will be found in your HRPTS Manager's Worklist. The request should be actioned, whether it was accepted or rejected, within 10 days.

If approved, you should complete the relevant pay processing paperwork to inform Human Resources of any contractual or pay affecting changes.

Step description On your HRPTS home page, click Employee Self Service	
In Employee Self service, click on Life & Work Events	
Under Additional Services, click on Work Life Balance	

When the PDF form appears, complete all fields. If a permanent change, the proposed end date should remain Dec 31, 9999. If a temporary change, please include the end date of arrangement. You should select 'Flexible Retirement' from the dropdown for Type of WLB Request.	Proposed Start Date Jun 1, 2025 Proposed End Date Dec 31, 9999 (Set to "Dec 31 9999" if a permanent request) Type Of WLB Request Flexible Retirement Proposed Work Pattern Flexible Retirement Important Notice: From July 2010, parents of children under 18 have a statutory right to apply for flexible working arrangements.
Click Next.	Personnel No. [Redacted] Employee Miss Lesley Allen Pers. Area B104 - Admin & Clerical Pers. Sub Area 3000 - Bus Supt-NonPoC Position 70026939 - Assistant Director of HR Services
You can review your completed form. When happy with the content, click send.	Send child aged under 18 have a statutory right to apply for flexible working arrangements i.e. an employee who is, or expects to be caring for an adult. To submit your application in accordance with this regulation by ticking the ☐ Yes ☐ No < Previous Next > Send

Example: Susan is aged 64 and works 30 hours per week. They have 10 years' service in the 1995 Section. Susan wants to partially retire from 07 November 2025 by reducing their hours to 27 per week.



Example: Mark is aged 55 and works 37.5 hours per week. He has 20 years' service in the 1995 Section. He plans to reduce his hours to 27 per week. He wants to partially retire from 01 September 2025

