GUIDANCE NOTE - FLEXIBLE RETIREMENT

OVERVIEW

Firstly, a New Post must be created for the employee moving to flexible retirement – please note that the requested hours will be taken from their substantive post.

<u>All forms referred to in this guidance note on processing a Flexible Retirement can be found on **MyView > My People tab > Forms**</u>

In the case of Flexible Retirement, the substantive post is temporarily left with the remainder of the hours. *Once the person has retired the hours will be given back to the substantive post and the new flexible retirement post should be deleted.*

STEP 1. Firstly, you need to complete a **Post Create/Amend and ATR Form** within **MyView > My People tab > Forms** to split the substantive post and for the employee to be moved into.
(YOU ARE DEALING WITH THE <u>POST</u> DETAIL HERE)

STEP 2 Secondly, you need to create a **Post Create/Amend and ATR Form** to advertise the remaining hours in their substantive post (if you wish to fill them on a temporary basis).
(YOU ARE DEALING WITH THE <u>POST</u> DETAIL HERE)

STEP 3 Complete a **New Appointment Form** for your Flexible Retiree.
(YOU ARE DEALING WITH THE <u>EMPLOYEE</u> DETAIL HERE)
The employee will not appear in your MyView until you complete this step.

STEP 4 Complete a **New Appointment Form** for your new start to the remaining hours of the substantive post (if required).
(YOU ARE DEALING WITH THE NEW <u>EMPLOYEE</u> DETAIL HERE)

NB. Please ensure that you make a note on the STEP 1 (ATR) form to the effect that the substantive post will have these hours returned to it the day after the retirement date in order that Business Support know when to review/action and take the hours back into the substantive post. This will keep your establishment correct in My View.

Please remember to keep a note of the end date in your own calendar, as you will need to complete a **Post Obsolete Form** *to delete the Fixed Term Retirement Post once your employee retires. This will ensure your My View is tidy and up to date.*

STEP 1 is also required for all Teaching posts to ensure a Leaver/New Start is submitted to the SPPA by Payroll. The SPPA will then end the existing pension record and open a new record for the continuing contributions.

STEP 1. Firstly, you need to create a **Post Create/Amend and ATR Form** to split the substantive POST.

Complete the form as you would until the Q. "Is the post already in your establishment?" – where you should select **No**. *(Although the hours are already there – this is a new post).*

When you get to the Q. "What is the Post Type?" – you should choose **Flexible Retirement**.

When you get to the Q. "Would you like this post to go to advert if approved?" – you should select **No.**

At the Q. "Justification for Post Creation or Changes?" – you should include that this is the new Flexible Retirement post for "your employee's name" and approximately how long it is required for (max 3 years).

NB. You should take a note of the end date as well, as you will need to complete an "Obsolete A Post" form to delete the New Retirement Post once your employee retires.

Wait for New Post ID

Once submitted - Business Support will process the form and will respond with your New Post ID.

You will need the new Post ID before proceeding to fill in the Employee Appoint Form for your employee taking Flexible Retirement. (See STEP 3 below)

STEP 2 – Secondly, you need to create a **Post Create/Amend and ATR Form** to advertise the remaining hours in the substantive post (if you wish to fill them).

Complete the form as you would until Q. "Is the post already in your establishment?" – where you should select **Yes**.

When you get to the Q. "Would you like to make changes to the post?" – you should select **Yes** (as you are reducing the hours in the post by the hours taken out of it by the Flexibly Retiring member of staff).

This is the form for your original substantive post - you should enter that substantive Post ID and details in this form.

When you come to the Q. "What are the hours of the post?" – you should enter the remainder of the hours, e.g. if your Flex Retiring employee takes 21hpw, you should enter 14.00 here if your post was 35hpw in total.

When you get to the Q. "Would you like this post to go to advert if approved?" – you should select **Yes.**

Please ensure that you make a note on the EATR Form that this post will be returning to 35hpw from the approx. retirement date - so that Business Support know when to review/action and take the hours back into the substantive post.

STEP 3 – Completing your **<u>Employee Appoint Form</u>** for Flexible Retiree.

NB. In Step 1 you created a new fixed term post for your employee. This step is to move the person into it.

Once in possession of the new Post ID from Business Support for the flexibly retiring employee, you now need to move them into the new Post ID to serve out the rest of their employment in the Flexible Retirement post.

The Employee Appoint Form must be used and ***<u>not</u>*** *the Employee Contractual Change Form.*

If you have an end date from the retiring employee, then please enter that in the Additional Information section. *(This must be no longer than 3 years max - this date can be changed at any time within the 3-year period).*

You should take a note of the end in your Outlook Calendar, as you will need to complete a Leaver Form for the employee upon their retirement.

<u>Tasks after the retirement has happened:</u>

1. You should complete a "**Leaver Form**" for the employee upon their retirement.

2. You will also need to complete an "**Obsolete A Post**" form to delete the fixed term post you created, after your employee retires.

3. Make a note in the "**Obsolete A Post**" form that these hours should now go back to the substantive post noting the substantive Post ID.

STEP 4 – Completing your **Employee Appoint Form** for your new start in the remaining hours of the substantive post.

Once you have completed your advertising process within Talentlink in conjunction with Business Support HR; the following checks must be in place prior to completing the Employee Appoint Form:

1. 2 x Suitable References have been received.
2. Any Disclosure Scotland/PVG checks have been completed (if required).
3. The Right to Work in the UK, Work permits, etc… (helpful links are on the EA form)
4. Membership of any bodies (if required)

Only then, should you go ahead and complete the Employee Appoint Form for your new start.

If you need any assistance, please contact
Recruitment.Enquiries@highland.gov.uk