

Process

Title: REQUEST FOR FLEXIBLE RETIREMENT (Version 2)

Ref: Human Resources and Finance

Last updated: 04/08/2015

The following process is to be used when making a flexible retirement request. If you are making a flexible working request without then wishing to retire please use the Flexible Working Process.

The University strongly advises employees to seek independent financial advice before making any decisions regarding flexible retirement or reducing their hours.

The process

1.	Details on the financial viability of a proposal should be considered, with input from Pensions and Payroll as applicable.
2.	Complete a Flexible Retirement Application form available on the HR website. Once completed this should be sent to your Line Manager.
3.	<p>Your Line Manager meets with you within 28 days of receiving the application.</p> <p>Discussion will focus on the flexible retirement proposal and how you believe this may be accommodated. As part of discussions consideration will be given to other options if it is evident that the original request is not viable.</p> <p>You may choose to be accompanied by a colleague, friend or trade union representative.</p> <p>Your Line Manager may wish to consult with the HR Manager who may attend the meeting.</p> <p>Note if you're a PASNAS member you will also need to gain approval from the PASNAS Trustees. The Pensions team will facilitate this process and can advise you further.</p>
4.	<p>Your Line Manager will write to you within 14 days of the meeting informing you of the decision, which may be:</p> <ul style="list-style-type: none"> • the original flexible retirement request has been agreed and the start date is confirmed • a compromise arrangement (likely to have been discussed at the meeting) has been agreed and the start date is confirmed • the request has been rejected and the business reasons are given for the decision. You will be informed of the appeals process <p>If consideration of a request is not possible within 14 days the Line Manager, may in exceptional circumstances, inform you that an extension is needed. Where this is necessary you will be provided with the reasons and likely timescale in which the decision will be made.</p>
5.	Your Line Manager will provide the HR Department with copies of the Flexible Retirement Application form and notification of the decision which HR will add to your file.
6.	If you are not content with the decision you may appeal in writing, to the next level of management within 14 days of receiving notification of the decision setting out the grounds for the appeal. The manager hearing the appeal will inform you of the decision within 14 days of the date of the appeal hearing. The appeal decision may be to uphold or reject (i.e. maintain the original decision) the original outcome.

	Note for PASNAS Members: if you are appealing against a decision made by the PASNAS Trustees you should follow the scheme's Internal Dispute Resolution Process. Please contact the Pensions team for further information and assistance.
7.	You should contact the Pensions Office to claim your pension benefits in line with your flexible retirement arrangements.