FLEXIBLE RETIREMENT

Employee completes application form (FR1) and submits to HR.

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HR processes application form and emails Pensions in Dundee.

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On receipt of estimate, HR emails estimate, FR2 and request form to employee, and also sends an email to line manager (cc HR Off and A/c).

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If employee wishes to proceed with flexible retirement request, they discuss their request with their line manager, including the start date for flexible retirement and their leaving date (must be within 2 years of commencement of flexible retirement, with a possible extension for a further 2 years)

If not supported by line manager

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Line manager writes to employee (employee can appeal).

If supported by line manager

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Line manager compiles Business Case and Appendices, including FR3 (with HR Off and A/c) and forwards to HR. Also, submits request to Service SMT.

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HR arranges signatures on Business Case.

If no costs to PKC

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HR submits the signed Business Case to the Strategic Lead/Chief Officer for approval.

If costs to PKC

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HR submits the signed Business Case to the Strategic Lead of Finance & Business Support for consideration then submits to ELT.

HR writes to employee with outcome and, if approved, also informs Pensions.
Line manager completes the necessary paperwork for HR.