

Line Manager Flexible Retirement App Guidance

This document contains guidance for line managers on how to review and approve flexible retirement applications for their employees. Before you receive an application for flexible retirement, the employee may have discussed this with you. On receipt of the application, you should discuss it in detail with the employee and then with your Head of Service.

You will receive updates when the application moves to the next stage throughout the process, however you can visit the Flexible Retirement Portal to view your applications and check their status at any time.

Please note: if you use the focused inbox in Outlook, emails from Microsoft Power Automate may go into the 'Other' inbox. Please ensure you check both your 'Focussed' and 'Other' inboxes.

Initial approval

Once the application has been submitted by the employee, you will receive the below email notification with the applicant's name and a link to visit the Flexible Retirement Portal.

New Flexible Retirement Request



Microsoft Power Apps and Power Automate <microsoft@powerapps.com>

To: I. (Corporate Services and Transformation)

This sender microsoft@powerapps.com is from outside your organization.



Tue 01/08/2023 15:07

CAUTION: This email originated from outside of the organisation. Do not click links or open attachments unless you recognise the sender and know the content is safe

Hi,

A new flexible retirement application has been submitted by Andrea.

Please now:

- Review the application ([click here](#)), ensuring you have discussed it with your employee. If the employee is taking their pension before normal retirement date there may be a reduction in the amount payable. Please ensure they have sought further guidance on this if required. If you require further information please visit [Derbyshire Pension Fund](#)

Free impartial information about workplace pension options are available from [Pension Wise](#) - Discuss the application with your Head of Service
- Complete the form within the app confirming whether you support the application or not.

If you are not the line manager of this employee, please contact HR Business Support.

Kind regards,
HR Business Support
BusinessSupport.HR@derbyshire.gov.uk

Once you click on the link, you will be taken to the below page on the portal. This is where you can review the information submitted on the application form, add in further information about how the reduction in hours would be covered, and details such as Assistant Director and Head of Service names.

All fields marked with a * are mandatory and must be completed before you can submit the form.

Note: if you have not discussed the shortfall with the employee and select 'No,' you will not be able to submit the application.

Flexible Retirement Portal

Please complete all blank sections below before pressing the submit button

Applicant Name Andrea	Employee number 15986452	Date of birth 15/09/1976
National Insurance Number PL098765T	Department Corporate Services & Transformation	Job title Cleaner
Grade 4	Location County Hall	Line Manager Name Karen Beardow (Corporate Services ... More)
Current Contracted Hours 37	Proposed Contracted Hours 18.5	Proposed Commencement Date 15/11/2023
* Assistant Director name Find items	If the employee is taking their pension before normal retirement date there may be a reduction in the amount payable. Please confirm below that you have discussed this with the employee and they are now aware of any shortfall and still wish to proceed having sought further guidance if required.	

31

Submit

Info

Note: If the proposed contracted hours are not exactly 50% of the current contracted hours, this will be highlighted in red in the Proposed Contracted Hours field. In exceptional circumstances, a decrease of more or less than 50% may be considered, however this would need to be discussed with your departmental [Resourcing Manager](#) first.

If this hasn't been agreed, please discuss this with the employee and then contact HR Business Support (businesssupport.hr@derbyshire.gov.uk) with confirmation of the revised hours who will amend the application.

Current Contracted Hours

4

Proposed Contracted Hours Error - Must be half of current contracted hours

3

After discussing with your Head of Service, you will need to add the Assistant Director and Head of Service names and confirm whether you support the application. If you do not support the application, you will not be able to submit the form without comments in the Line Manager Comments field. Please ensure the comments clearly show the reason for not supporting the application. The application will then be sent to the Executive Director who will either agree or, in limited circumstances, disagree with your decision. If your decision is upheld, you will receive an email to discuss the decision with your employee and give them information to appeal. If your decision is not upheld the application will progress to the next stage.

The application can also be rejected at the Resourcing Manager, Assistant Director and Workforce Governance decision stage of the process and will be sent to the Executive Director to decide. If the application is rejected by the Executive Director at any of these stages, you will receive an email to discuss the decision with your employee and give them information to appeal.

Flexible Retirement Portal

Please complete all blank sections below before pressing the submit button

reduction in the amount payable.
Please confirm below that you have discussed this with the employee and they are now aware of any shortfall and still wish to proceed having sought further guidance if required.

Further information can be found on Derbyshire Pension Fund and Pension Wise

* Do you support this flexible retirement application, having discussed it with your Head of Service?

* Head of Service

Line Manager Comments

31

Submit

Info

If you do support the application, you must complete the additional fields which will then become visible.

Short description of duties

Please provide details of the team structure and headcount - Can be attached below

Please outline the benefits to the organisation, service and employee in supporting this request

What are the financial implications of this request i.e. will the reduction contribute to savings targets?

What are the resourcing implications if the request is supported i.e. are there other vacancies in the service, how will the reduction in hours be filled, will this leave a gap in resources for a period and if so, how will this be managed?

Line Manager Comments

Submit

Info

Once you submit the form, you will be taken to the 'What Happens Next' screen, which details the rest of the process.



What happens next?

1. Once the application is submitted, it will be sent to Business Support who will produce a pension estimate.
2. Once the pension estimate has been received, the application will be sent to the Resourcing Manager for your department.
3. If the Resourcing Manager supports the request, it will be sent to the Assistant Director for approval.
4. If the Assistant Director supports the application, it will be sent to HR, Legal Services and Finance for approval.
5. Once the application has been reviewed by HR, Legal and Finance, it will be sent to the Executive Director for approval.
6. If the Executive Director supports the application, it will be sent to the Resourcing Manager for final review before it is sent to pensions.
7. When all necessary approvals are granted, you will receive an email to asking you to confirm the actual commencement date, as this may be different to what was originally submitted.
8. Confirmation of the approval will be sent to HR services and Derbyshire Pension Fund.
9. Line manager discusses the outcome with the employee.
10. Line manager advises HR Services via a Personnel Change Request form on SAP Workplace of the revised working pattern and agreed start date.
11. Once the start date is confirmed, HR services will provide pay details to Derbyshire Pension Fund to allow calculation and payment of pension to the employee. Derbyshire Pension Fund will contact the employee to request the relevant pension forms are completed to enable appropriate payments to be made.

If you have any questions about flexible retirement, please contact your departmental Resourcing Manager within the HR Reward and Resourcing Team or Derbyshire Pension Fund.

[Click here to view HR teams information](#)

[Click here to go to Derbyshire Pension Fund website](#)

You will receive a confirmation email with the details of the application for your records. This will contain a link to the Flexible Retirement information page on Our Derbyshire, and a link to the Flexible Retirement Portal so you can check the progress of the application. You can only view applications on which you are listed as the line manager.

Flexible Retirement Application

Microsoft Power Apps and Power Automate <microsoft@powerapps.com>
To: (Corporate Services and Transformation)
This sender microsoft@powerapps.com is from outside your organization.

Reply Reply All Forward Wed 28/06/2023 15:06

Hi,

The flexible retirement application form for Alexandra has been submitted successfully. We will now progress this through the approval process. Please note this can take around 3 months, but you will be kept up to date at each approval stage, with the first stage normally taking around 6 weeks. Details of the process can be found on [Our Derbyshire](#). Please update your employee on the progress of their application.

A copy of the response is below for your records.

Applicant Name	Alexandra
Employee Number	25896321
Date Application Received	28/06/2023
Job Title	Cleaner
Department	Corporate Services & Transformation
Grade	4
Location	County Hall
Current Contracted Hours	37
Proposed Contracted Hours	18
Proposed Commencement Date	13-09-23
Short Description of Duties	
Team Structure Details	
Benefits to the Organisation	
Financial Implications	
Resourcing Implications	
Resourcing Manager	Tanya Causebrook


If you require any changes to this form please contact HR Business Support - businesssupport.hr@derbyshire.gov.uk
[Click here](#) to go to the app the view the progress of this application or view your other applications

Kind regards,
HR Business Support
BusinessSupport.HR@derbyshire.gov.uk

Request for commencement date following approval

After the Executive Director has approved the application, you will receive an email asking you to confirm the actual flexible retirement commencement date.

Input the date into the comments box in the format “dd/mm/yyyy,” for example 01/04/2024. No other information is needed.

**Approvals | Power Automate**
Flexible Retirement Application
Requested by | **(Corporate Services and Transformation)**
<| |@derbyshire.gov.uk>
Date Created | Friday, 7 July 2023 14:03
Hi,
The flexible retirement application for John Smith has been approved by the Executive Director.
Please agree a commencement date with the applicant and enter the actual commencement date for flexible retirement in the box below.
Kind regards,
HR Business Support
BusinessSupport.HR@derbyshire.gov.uk
Comments

Once you have confirmed the commencement date, your Resourcing Manager will submit confirmation of approval to HR Services and Derbyshire Pension Fund, then you and your employee will receive a notification. Once this is received, you can raise a Personnel Change Request form on SAP Workplace. Guidance on how to do this can be found on the [SAP Workplace guidance](#) page.

Viewing existing applications

You can view any applications you have previously submitted using the ‘View Applications’ button on the Flexible Retirement Portal

Flexible Retirement Portal

Welcome Karen Beardow

Please choose from one of the following options below:

[View existing applications](#)

[Business Support - Edit Application](#)



You will then be shown a list of your applications, which you can filter status. Clicking on an application will show you the details, including the approval status and any comments made.



Flexible Retirement Portal

Application Status

Fluff

Children's Services

Date Application Submitted: 18/04/2023

Application Status: RM final review



Molly

Adult Social Care & Health

Date Application Submitted: 20/04/2023

Application Status: Assistant Director review



Barbara

Children's Services

Date Application Submitted: 20/04/2023

Application Status: Complete - not supported



Info

