

## Flexible Retirement Process

### Application Stage

- 1) Employee completes FR1 application and sends to manager. They should sign up to SPFOne (<https://www.spfonline.org.uk/>) if they haven't already done so.
- 2) **Manager should seek advice from HR Business Partner.** If manager can support the application, manager sends the application to HR at [retirement@glasgowlife.org.uk](mailto:retirement@glasgowlife.org.uk), to obtain retirement calculation.
- 3) When calculations are received, HR checks if there are costs to the organisation and advises manager of costs vs savings. Manager obtains written authorisation from Head of Service.
- 4) If authorisation is granted, HR confirms with the manager that the employee wishes to go ahead, effective date and new work pattern (plus any amendment required to NSWSP payments). FR1 form may need to be updated.
- 5) If authorisation is not given, the employee should be informed by their manager.

### Approved next stage

- 6) HR provides employee with pension forms
- 7) Employee completes pension forms and returns them to HR. Scanned copies or clear photographs are accepted. HR sends the forms to CBS for payroll input then CBS send on to the pension office
- 8) HR updates all parties on progress.
- 9) SPFO will liaise directly with employee from this point onwards if they require further information and they will send final pension benefit figures.

### GL Position Management stage

- 10) GL Position Management request updates to contract and pay record. CBS will send the employee a confirmation of flexible retirement arrangements.