

RETIRE & RETURN MANAGER'S CHECKLIST

To be used in conjunction with the Retire and Return Procedure

This Checklist can be followed when an individual is returning to same role or department. If the employee is returning to a role in a different department the usual Trac Recruitment process is followed and recruitment will issue the appointment letter and contract.

All forms can be found in the Retire and Return Toolkit. ([Retirement - Cardiff and Vale University Health Board \(nhs.wales\)](#))

Employee Name:			
Item	Action	When	Completed
Retire and Return Request and Approval Form	To be completed and signed by Employee, Line Manager and Clinical Board Head/Nurse and kept in Employee's personnel file. (RR request and approval form 2020 11 24.docx (live.com))	Employee to complete Part 1 and submit to manager, providing at least 5 months' notice	
Termination Form	Line Manager to complete (or the Medical Workforce Department in the case of Medical and Dental staff), selecting 'retirement age' as reason for leaving. (N.B. the 24 hour break must be extended if the individual is due to be paid for any outstanding annual leave on their date of termination) (Termination Form Cardiff & Vale.xlsm (sharepoint.com))	Following completion and approval of the Retire and Return Request application	
Retire and Return Proforma	Line Manager to complete and forward to the People Services Team (CAVHR_Actionpoint@wales.nhs.uk)/Medical Workforce for processing. A copy of Part 2 of the Retire & Return Request form confirming the application approval should be attached. People Services to process and issue an appointment letter and new Contract of Employment (a copy is sent to the line manager on the date of return to work). (RR proforma 2020 11 24.docx (live.com))	Following completion and approval of the Retire and Return Request application	
Re-enrolment Form	Line Manager to complete and return to the Enablement Team (automatic submit button on form) This will generate a New Appointment Form that will be emailed directly to the line manager within 48 hours (not including weekends or bank holidays) that is to be completed on the date the individual returns to work in UHB. (All Wales Request For NAF v2.4 (July 20).xlsm (live.com))	Following completion and approval of the Retire and Return Request application	
PEC – DBS (if applicable)	Where the line manager has selected that a DBS is required on the Retire and Return Proforma, the People Services Team Administrator will forward an Adhoc DBS form to the Line Manager for completion, this is returned to CAVHR_Actionpoint@wales.nhs.uk where it will be forwarded to Recruitment for processing.	The Adhoc DBS form to be sent to Payroll 4-6 weeks ahead of the return to work date	
Chairman's Proforma	Line Manager to complete and return to Janice Pitt (Janice.Pitt@wales.nhs.uk) This enables the employee to receive a letter from the Chairman and allow an opportunity for them to meet them if they choose to. (https://cavuhb.nhs.wales/files/retirement/chairs-retirement-proforma-2019-1-doc/)	Immediately following approval of the Retire and Return Request Application	