

Partial Retirement application form (CSP15)

You can use this form to request a quote for partial retirement.

IMPORTANT: you must complete Section A of this form and return it to your employer. Your employer will need to complete Section B of this form. Please read the guidance notes & important information carefully below, before completing this form. Please complete this form in black ink and in BLOCK CAPITALS.

Section A – your personal details

Your name	<input type="text"/>												
Your date of birth (DD/MM/YYYY)	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>												
Your address and postcode	<input type="text"/> <input type="text"/>												
Your Staff or Pay number	<input type="text"/>												
National Insurance number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>												
Which scheme are you in?	<table> <tr> <td>classic</td> <td><input type="checkbox"/></td> <td>nuvos</td> <td><input type="checkbox"/></td> </tr> <tr> <td>classic plus</td> <td><input type="checkbox"/></td> <td>alpha</td> <td><input type="checkbox"/></td> </tr> <tr> <td>premium</td> <td><input type="checkbox"/></td> <td></td> <td></td> </tr> </table>	classic	<input type="checkbox"/>	nuvos	<input type="checkbox"/>	classic plus	<input type="checkbox"/>	alpha	<input type="checkbox"/>	premium	<input type="checkbox"/>		
classic	<input type="checkbox"/>	nuvos	<input type="checkbox"/>										
classic plus	<input type="checkbox"/>	alpha	<input type="checkbox"/>										
premium	<input type="checkbox"/>												
Your telephone number	<input type="text"/>												
Your email address	<input type="text"/>												

Partial retirement and your job

To qualify for partial retirement you must permanently reduce your earnings by at least 20%. You can do this by either reducing your working hours or pay grade. You will need to agree this with your employer before applying.

Your job before partial retirement

Your employer's name	<input type="text"/>										
Your job title	<input type="text"/>										
How many hours do you currently work each week?	<input type="text"/>										
Planned end date	<table border="1"> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </table>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Your current pay	<input type="text"/>										

Your job after partial retirement

Your employer's name (if different from above)	<input type="text"/>										
Your job title (if different from above)	<input type="text"/>										
How many hours will you work each week?	<input type="text"/>										
Planned start date	<table border="1"> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </table>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Your new pay	<input type="text"/>										

Abatement – your pay and pension

We may reduce your pension if your pay and pension combined when re-employed is more than the pay you received before claiming your pension. This is called abatement.

You can find more information about abatement in the Civil Service pension scheme guides here:

www.civilservicepensionscheme.org.uk/publications

Your declaration

- I have read section O5B of the 'alpha scheme guide', or 'Partial retirement – A guide for scheme members' (for members of the other schemes).
- I understand the effect that abatement may have on my benefits.
- I understand that the reduction in my earnings must be a permanent change.
- I want to change my current job as set out on Page 2 on the date shown and I am aware of the potential financial impact of partial retirement.
- I have discussed, and agreed, my partial retirement with my employer.

Your signature: _____

Date: _/_____/_____

Section B – to be completed by the employer

Please complete this section to confirm that you have agreed the partial retirement of the employee detailed in Section A. This action may be carried out by your payroll department or Shared Service Centre.

Please complete this form in black ink and in BLOCK CAPITALS and return it to: Civil Service Pensions, PO Box 2017, Liverpool, L69 2BU.

IMPORTANT: please read the guidance notes and important information below, before completing this form.

Employer authorisation

By completing this form, I confirm:

- that the details shown for the current and 'reshaped' jobs are correct
- that the member's permanent pensionable earnings will be reduced by at least 20% and the full details have been provided on the following page
- that the change in the employee's position is intended to be permanent.

Your full name	<input type="text"/>
Your job title	<input type="text"/>
Today's date	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Your telephone number	<input type="text"/>
Your email address	<input type="text"/>

Confirmation of employee's current earnings

Employee's job title	<input type="text"/>
Employee's total annual earnings	£ <input type="text"/>

*This includes the total annual rate of actual salary and permanent pensionable allowances.

Confirmation of employee's reshaped job role

When confirming your employee's new rate of salary and allowances, if their new reshaped role is part-time, include the part-time rate they will receive.

Employee's reshaped job title	<input type="text"/>		
Employee's reshaped start date	<input type="text"/>	<input type="text"/>	<input type="text"/>
Employee's reshaped annual salary	Full-time rate	£ <input type="text"/>	
	Part-time rate	£ <input type="text"/>	
Employee's reshaped permanent pensionable annual allowances	Full-time rate	£ <input type="text"/>	
	Part-time rate	£ <input type="text"/>	
Employee's total reshaped annual earnings*	£ <input type="text"/>		

*This is the total rate of actual salary and permanent pensionable allowances.

Your declaration

This form has been approved on behalf of the employer (HR / Payroll).

Your signature: _____

Date: _/_____/_____

Guidance notes for members

Before you apply for partial retirement it is important that you understand:

- the effect that abatement may have on your benefits;
- the permanent reduction in your earnings;
- the change to your current job and potential financial impact of it.

We advise that you visit the publications section on our website:

www.civilservicepensionscheme.org.uk/publications, and read the following.

- 1) The Civil Service pension scheme guide for your scheme.
- 2) Section O5B of the 'alpha scheme guide' or 'Partial Retirement - a guide for scheme members' (if you are a member of classic, classic plus, premium or nuvos).

You should also read the What to Expect guide to claiming your Civil Service pension, which can be found here: **www.civilservicepensionscheme.org.uk/members/what-to-expect/**

You must also contact your employer to discuss your options and agree your partial retirement.

Guidance notes for employers

Please read the following guidance carefully before submitting the application for partial retirement.

1. Members can apply for partial retirement if they meet the following criteria.
 - They agree to reduce their pensionable earnings permanently by at least 20%.
 - They are at or over the minimum retirement age of 55 (or age 50 for members that joined classic, classic plus or premium before 6 April 2006).
2. Members must apply for partial retirement within three months of reshaping their job (for example, the date they permanently reduce their earnings). Partial retirement will be payable from the date the member permanently reduced their earnings.
3. The 'Start Date' of the member's reshaped job must be the day after the 'Planned End Date' of their job before partial retirement. 'Planned End Date' and 'Start Date' must be consecutive, even if the member doesn't physically start their reshaped job straight away because of a weekend or annual leave.
4. The pro-rated working hours of the reshaped job must be a decimal figure. For example, if a member is reducing their working hours to 22 hours and 12 minutes per week, you must record it as 22.20 not 22.12.

12 minutes / 60 minutes = 0.2 hours
5. In the 'Employer Section' of the form, the 'Employee's reshaped annual salary' and 'Employee's reshaped permanent pensionable annual allowances' must be included separately using the fields provided. Please provide a combined figure in the 'Employee's total reshaped annual earnings' field.
6. Please be sure to correctly pro-rate the 'Employee's total reshaped annual earnings' in line with their reshaped job role.

For example, if a member has an annual salary of £20,000 and a permanent pensionable allowance of £5,000 and they are reshaping their job from 37 hours per week to 22.20 hours per week, it would be pro-rated as follows:

Annual salary: $£20,000 \times 22.20 / 37.00 = £12,000$

Permanent pensionable allowance: $£5,000 \times 22.20 / 37.00 = £3,000$

Total annual earnings: $£12,000 + £3,000 = £15,000$

If the 'Employee's total reshaped annual earnings' have not been pro-rated correctly, the Scheme Administrator will query this figure.

7. If the member does not have any permanent pensionable allowances, you do not need to complete the 'Employee's reshaped permanent pensionable allowances' section. However, you must complete all other sections of this form.