

1. Policy Statement

At NHSBT, we recognise that it is necessary to provide a clear process and guidance to our managers and employees, and to provide the appropriate support for any reason for leaving the organisation. Our aim is to provide as smooth a transition as possible from our employment in any circumstances.

Additionally, our commitment to inclusion across race, gender, age, religion, identity, and experience drives us forward every day and this is reflected in this Policy.

There are several ways in which our employees leave our employment, and this policy will explain the process that you need to follow in these circumstances:

- Resignation
- Leaving work and claiming an NHS Pension
- Leaving Work, claiming an NHS Pension and returning to work with NHSBT (Flexible Retirement)
- Leaving work and claiming an NHS Pension under Voluntary Early Retirement
- Leaving work prematurely and claiming an NHS Pension due to ill health
- Leaving work and claiming a non- NHS Pension
- Death in Service
- For Redundancy, Fixed term contracts, and Dismissal, refer to the appropriate policy and process.

When using this policy, you also need to refer to [Knowledge \(FAQ's\)](#) in People First

For Bank/Honorary, see Leavers FAQs.

2. The Process

The process sets out what you need to do if you are leaving us, and what your manager and the organisation will do to support this. It is important to provide the right level of support for you when leaving. We understand that, in some circumstances, this can be a very sensitive, emotional or difficult time.

Resignation

If you are considering resigning from your post, we would encourage you to have a conversation with your manager, or your manager's manager to ensure that you are able to agree an appropriate intended leave date taking into consideration the following:

- Your contractual notice period
- The date you wish to start with your new employer
- Your new annual leave calculation

You will need to put your notice in writing to your manager, including the details of your intended leave date. It is most important that your manager completes the [Termination/Leavers form](#) immediately on receipt of your resignation.

Should you resign from your post, your manager will seek to understand and discuss with you your reasons for leaving and may wish to explore with you anything we may have done differently which may have encouraged you to stay. We will always encourage you to seek out those you can talk to about the reasons for your decision, so if you feel unable to speak to your manager, you may wish to consider HR Direct; your Trade Union representative, or another manager in your department/directorate.

You will also be encouraged to take part in our on-line exit survey. You will receive a link to this from NHSBT notifications.

Annual leave

You and your manager must ensure that any annual leave you have accrued up to and including your leaving date must be taken. Should you be unable to take this due to operational requirements, your manager may authorise to pay you any outstanding annual leave in your final salary. If you have taken more annual leave than you have accrued up to and including your intended leave date, this will be deducted from your final salary. Your manager will receive an email from NHSBT Notifications with the number of hours of annual leave to be paid/deducted. This must be approved for payment to be made.

Leaving work and claiming your NHS Pension

Deciding to leave work is a very personal choice and as soon as you have thoughts about leaving work and accessing your NHS Pension, you may wish to start to have discussions with your manager. You may not be clear at this time as to your intentions or options and therefore this will allow you to talk confidentially about your own aspirations, thoughts and ideas and what specific support you may need. The earliest date that you will be able to access your pension will vary depending on the pension scheme and section you are in.

Your Total Reward Statement (See 'Pensions' in People First) will have some valuable information in helping you with your decision.

If you are a member of the NHS Pension Scheme, although your contractual notice will be less, it is advisable that you provide a minimum of 16 weeks notice in writing to your manager to avoid delays in the payment of your Pension. This should enable all the necessary documentation to be completed to ensure that you receive the timely payment of your NHS Pension.

Once you have discussed and decided on the detail, you need to confirm your intentions in writing to your manager.

You and your manager will agree that any outstanding annual leave is taken before your last day as this will not normally be paid as an alternative to taking the time off.

For my information go to [Pensions](#) on People First

Leaving work and claiming an NHS Pension under Voluntary Early Retirement

If it is your intention to take payment of your NHS Pension benefits before you have reached Normal Pension Age (NPA), then your benefits will be reduced to take account of your early payment. Before you hand in your resignation, it is essential that NHS Pensions have confirmed to you that the 'Guaranteed Minimum Pension' (GMP) test has been met. This test is an individual, statutory check by HM Revenue and Customs (HMRC) that your pension meets the minimum level as laid down by the relevant legislation. If this is not done, then your NHS Pension will not be paid.

You must ensure that once you have received your estimate for initial consideration that you check the GMP test has been confirmed by HMRC to NHS Pensions before handing in your resignation. The Pensions Administrator will be able to advise you about this.

Leaving work prematurely and claiming an NHS Pension due to ill health

If it is your intention to make an Ill Health application, you will need to discuss this with your manager. Regular meetings will probably have been taking place as part of the management of your absence or ongoing health situation, including Occupational Health referrals. This may be an option for you if you have received medical advice from Occupational Health or a medical practitioner that you are unfit to return to work with no return date due to Ill Health or in cases of terminal illness.

When making an application, it is essential that you have sought all of the necessary advice and have the appropriate information to ensure that you make the right decision for you. In addition, you will need to complete the correct paperwork in a timely manner.

You should, however, note that once you have advised us that you intend to pursue an ill health retirement application, you will be invited to a meeting where your employment will be terminated at the point your application is submitted regardless of whether that application is approved or not.

Leaving work and claiming a non-NHS Pension

If you are not a member of the NHS Pension Scheme and have a pension elsewhere, you are still advised to discuss your intentions with your manager. Whether you have decided to take your pension or not at this time, but still wish to leave, you will need to provide contractual notice.

Leaving Work and claiming your NHS Pension and returning to NHSBT (Flexible Retirement)

If you are in an NHS pension scheme, you may wish to explore what options you have to claim your pension and request to return to work for us. This may be the same or a different role that you do currently. For more information, see [Retirement and Retire and Return](#) on People First

Death in Service

The death of an employee is a traumatic experience and must be handled with great care. In addition, it is essential for managers to put appropriate plans in place for bereavements as effectively and sensitively as possible.

There are many practical issues which, as the manager of the employee who has died, you will need to ensure are completed. There is a '[Death in Service checklist](#)' available to support you with this.

Leavers Questionnaire

Following receipt of the leavers/termination form by Pay Support, you will receive a link to our Leavers Questionnaire by e mail which we would encourage you to complete on receipt. We like to think of ourselves as a good employer and NHSBT as a great place to work. However, it is important that we listen to your feedback good and bad, so that if there is something we need to do or change, we can.

Should you have any difficulty in accessing the questionnaire, contact HR Direct, who will be able to properly assess your needs and help you to access questionnaire.

Your responses are confidential and will be read by Human Resources to help us understand the reasons why people leave, what we do well and any improvements we need to make.

Should you raise any issues or concerns before you leave, by either speaking to your manager or through the Leavers Questionnaire, you will be given an opportunity to meet with HR and /or an appropriate operational manager to discuss your concerns or issues.

Confidentiality

All conversations must be kept confidential by all parties involved. We appreciate that this can sometimes be difficult. However, so that issues raised can be brought to a swift conclusion and everyone feels able to move on, confidentiality must be maintained.

References

If you are providing us as a referee to a potential new employer, please provide them with our contact details as: HRDirect@nhsbt.nhs.uk

As a manager, please refer all reference requests to [HR Direct](#).

Corporate Written References

NHSBT will always provide a reference when requested, unless you tell us otherwise. In this situation, we will state that you do not wish us to provide a reference, and therefore we will refer the potential employer back to you. In the first instance, we will provide a standard reference containing the following information:

- The job role you were performing at the time that you left us
- Your start date
- Your leave date
- We will also provide a continuous service date if requested by another NHS or public sector employer.

In some circumstances, any additional information may be provided if requested by your new employer for example:

- The number of days taken as sick leave. However, reasons for absence will not be provided.
- Any investigation that had been completed and a decision communicated.
- Any sanctions on file, that were live or unspent at the time of leaving.
- If you have been dismissed and the reasons why.

Should you be dismissed by us, there are some circumstances where we have a duty and obligation to share with an employer whether they ask us or not. Examples of such issues may include:

- Safeguarding
- Fraud
- Theft
- Incidents resulting in reporting to a professional body
- Criminal acts reported to the police

This list is not exhaustive.

Managers Reference

Should the above not satisfy your new employer, and should they come back to us for additional information, if this cannot be easily answered by HR Direct, this will be referred to the person who managed you when you left the organisation to respond. The types of questions that may be asked in this case may be:

- Timekeeping
- Attitude
- Behaviours etc

This list is not exhaustive.

Managers who are asked for a reference need to ensure that you provide a true, fair and accurate reference. Should you need any advice or guidance in providing this, contact HR Direct. There may be times that you are asked to provide this by telephone. To ensure that you are able to answer their questions fairly, you should only provide this if you are/were the employee's immediate manager.

Before you answer any questions, you must take reasonable steps to ensure that the enquiry is from a genuine source.

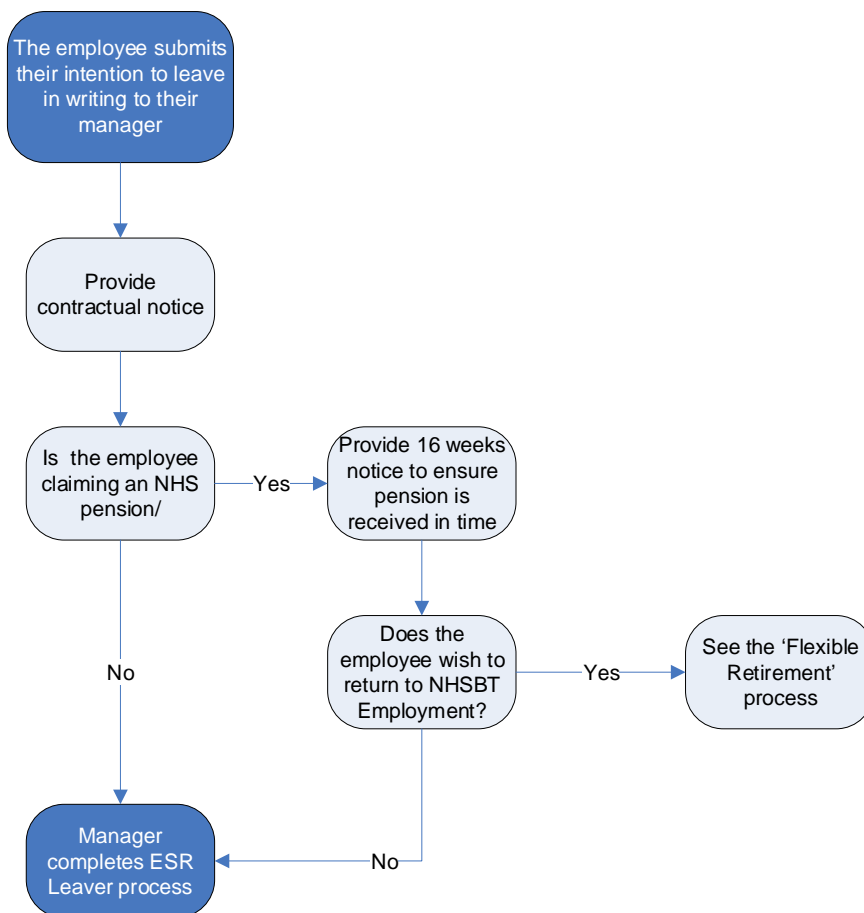
Personal References

This can be given by anyone. However, as there are legal consequences of providing a reference, personal references must not be written on NHSBT headed paper. If asked for a personal reference, you must state that it is written on a personal basis, and not on behalf of NHSBT.

If you are approached as a peer or colleague (i.e. who have no management responsibility for that employee) you should make it clear that you are only providing a personal reference as detailed above.

3. Flowchart

Leaver Process



4. Policy Approval and Review

Policy version	UCD/People/Leavers/013v3.1
Title	Leavers Policy
Approved by SPC	21 st April 2022
EIA completed	2 nd August 2022
Counter Fraud check	18 th July 2022
This document replaces	UCD/People/Leavers/013v3.0
Effective Release Date	August 2022
Review Date	April 2025
Author	Daryl Hall
Filepath	G/HR/HR/Everyone/Policies
Distribution	Available on People First