

Leaver Form Guidance (2017/18)



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Background

When a member stops contributing to the Local Government Pension Scheme (LGPS), a leaver form must be sent to the East Riding Pension Fund (ERPF) in order to calculate the member benefits up to date of leaving. There are various reasons why a member could stop contributing. These include:

- Retirements
- Deaths
- Opting out
- Resignations
- Dismissals
- Transferred to a non-eligible post ie. Teaching Assistant becomes a Teacher

Opt Outs

You do not need to complete a leaver form if the member has opted out within three months of joining. This is because the member is only entitled to a refund of their contributions and that is paid by yourselves through the payroll system. You will still need to send the ERPF confirmation of this by using the "[Under 3 Month Optout Confirmation](#)" form.

Career Break

You do not need to complete a leaver form if the member has left to undertake a Career Break. The reason for this is, although they are not working for you, they are still "on the books" and as such have not left eligibility of the LGPS.

Depending on the setup within your department, it may be that your Human Resources department completes the first two pages of the leaver form and your Payroll department completes the last two pages. The form does not have to be sent together however, before any calculation of benefits can be performed (both for retirements and non-retirements), both parts must be received at the ERPF. This is an audit requirement.

If your department completes and sends all the pages of the leaver form at the same time then this is not a problem. However if the member is retiring the ERPF require notification ie. Pages 1 and 2 at the earliest opportunity as the member will need retirement options before payment of their benefits can be made. This will avoid unnecessary delays. In this event you can complete the ERPF Notification of Retirement form.

For examples of how to complete the leaver form, please see the separate document "Leaver Form Examples 2016/17".

Procedures and Forms

The leaver form is one document however due to differing employer setups it may require completion by two different departments ie HR and Payroll. When completing the leaver form, it does come in two parts. Dependant on what type of leaver you are dealing with will determine whether both parts can be sent at the same time or not.

If the member is retiring the ERPF require notification ie Page 1 and 2 at the earliest opportunity as the member will need retirement options before payment of their benefits can be made. This will avoid unnecessary delays. In this event you can complete the ERPF Notification of Retirement form.

If the member is not retiring, then the employer can send both parts together.

Member details

You should complete this with all the relevant information. The date of leaving this post is normally the date that the member ceased employment with you. If the member has opted out, the date of leaving will be the end of the payment period during which the notice is given unless the member has specifically written a date they wish to opt out from. They opt out date cannot be earlier than when the optout form is received.

For example, if a properly completed optout form is received on 12 July 2016, then the date of leaving this post would be 31 July 2016. If the member had written on this form "I wish to be opted out from 28 July 2016" then the date of leaving would be 27 July 2016.

Reason For Leaving - Non-Retirement leaver

A non retirement leaver is a member who does not have immediate access to their benefits.

Resignation

Where a member simply hands in their notice and they are under the age of 55, then you will need to tick this box. Where the member is over the age of 55 and they hand in their notice, you should check with them as to whether they are considering accessing their pension benefits. If they do not want to access their benefits then you can also tick this box. If they want to access their pension, you will need to tick the relevant box under the "Retirement Leaver" section.

End of Fixed Term Contract

Where a member's contract terminates and they are under age 55, then you will need to tick this box.

If the member is over age 55 you should check with them as to whether they are considering accessing their pension benefits immediately. If they do not want to access their benefits then you can also tick this box. If they want to access their pension, you will need to tick the relevant box under the "Retirement Leaver" section.

Due to employment regulations, if the fixed term contract has been for more than two years then you may be paying a redundancy payment. If this is the case and the member is under age 55 then you would complete the Redundancy – under age 55 box in the non retirement section.

If you are paying a redundancy payment and the member is over 55 then you should complete the Redundancy – over age 55 box in the retirement section.

Opt Out

Any contributing member can make a decision to opt out of the scheme whilst continuing to work. The only way that you should proceed and opt a member out of the scheme is if they have completed and returned the ERPF Optout form. You should not accept a letter or email as this is not a signed declaration that they are aware of the future benefits they are giving up.

When a member opts out of the LGPS, they are not entitled to the payment of their pension benefits until they cease that employment therefore this box would be ticked in all instances.

When sending in the leaver form, you should also include a copy of the member's opting out form. There have been many cases in the past where a member has been adamant they have not opted out so by having a copy of their signed optout form on file proves that they did. As the employer, you should also keep a copy.

If the member is opting out within three months of starting in the scheme, you do not need to complete the leaver form. You will need to complete and send in the "[Under 3 month optout confirmation](#)" form.

Dismissal

Where an employee has been dismissed from their employment, there is an additional question to ascertain whether the reason was financial or non financial. The ERPF are trying to establish whether the reason for dismissal fraudulent. This is because under the LGPS regulations you may be able to recoup any monetary losses from the member's pension benefits. If you wish to pursue this option, you would then need tick this additional box.

Redundancy under age 55

Where you have made the member redundant and they are under the age of 55, you can simply tick this box. Due to their age, they are not entitled to the payment of their pension benefits.

Death In Service

In the unfortunate event of a scheme member passing away then the ERPF will require some additional information. You would need to establish and supply the ERPF with a contact name and address of their next of kin. This is so that the ERPF can liaise with them regarding the payment of any benefits.

Please note - the contact does not automatically qualify for receipt of any pension or death grant benefits. All it is used for is to contact a friend or family member to gain further information.

Retirement – Leavers

Dependant on the member's age and the circumstances of their retirement, there may be strain costs payable. These will be identified under each of the following headings.

Voluntary Leaver – Over age 55

Where a member simply hands in their notice and they over the age of 55, you should check with them as to whether they are considering accessing their benefits. If they are considering accessing their benefits then you should tick this box. If they do not want to access their benefits, you should tick the relevant box under the "Non-Retirement Leaver" section.

For these retirements, there are no strain costs. Reductions to member benefits may apply.

Under the current regulations, the employer has the option of waiving any reductions that may be applicable to any benefits built up from 1 April 2014. If you wish to do this, your discretionary policy must allow it. To waive the reductions, you would need to tick the box beside this marked "Waive Reductions". Also, if you do approve this, there will be a strain cost payable.

Voluntary Leaver – Over age 55 to eve of 60th birthday and switching on Rule of 85

Where a member voluntarily resigns between age 55 and 60, there will be reductions applicable to their benefits even if they have historic 85-year rule protections. This is to cover the fact that their benefits are being paid so early. Prior to 1 April 2014, these members could only retire with employer consent and therefore strain costs would be payable.

Under the new regulations, the employer has the discretion to “switch back on” the 85-year rule. This will mean that the member will have less or no reductions. There would be a strain cost payable.

For those who retire on or after their 60th birthday, the 85-year rule is automatically switched on and there is no strain cost payable.

Retirement – Ill Health

Where a member is being considered for ill health retirement, initially they must be referred to one of the ERPF’s Independently Registered Medical Practitioner (IRMP) to assess their case. The IRMP will review all the medical evidence, request reports from specialists and GP’s and may even talk to the member.

Once an IRMP has made their recommendation they will complete a certificate and send this back to the employer. Only once you have received this can you begin to assess whether to approve the ill health retirement or not. The scheme employer must consider the IRMP’s recommendation including the tier however ultimately it is the employer’s decision to award an Ill Health Retirement. Once a decision has been made, you can request an estimate from the ERPF stating the tier award. Employers should note that there is a significant difference in member benefits depending on the tier awarded.

A leaver form stating Retirement – Ill Health will need to be completed and returned along with a copy of the IRMP’s certificate. The ERPF can then commence the retirement process.

There are no up-front strain costs associated with ill health retirements – the scheme actuary takes into account the fact that a proportion of your workforce may retire on ill health grounds and is therefore included as part of the triennial valuation. Depending on the size of your organisation, many approved ill health retirements may have an effect on your employers contribution rate determined at the next valuation.

Efficiency of Service/Redundancy – over age 55

If the member is released on the grounds of efficiency of service or redundancy (voluntary or compulsory) and are over age 55 then the regulations state the member is entitled to immediate payment of their benefits without any reductions applied. This is just the value of their pension at the time of retirement – it is not enhanced to 65 or State Pension Age.

Immediate payment is compulsory so employers should be aware that if the member is aged between 55 and 60, there will be strain cost payable. Members aged 60 and above will most likely have a strain cost payable but this would be assessed on an individual basis. Members over State Pension Age will not have a strain cost.

Flexible Retirement

Flexible retirement is where a member can access their benefits, with their employers consent, and continue working. The member would need to agree to a reduction in hours or salary grade. Any member who wishes to be considered for flexible retirement must approach their employer. The reason for this is the employer will firstly check their discretions and if applicable consider their request

Once the employer has approved their request, a leaver form should be sent with the date of leaving being the last day the member worked on their increased hours or salary grade.

For those aged between 55 and 60, there may be a strain cost payable. For those over the age of 60, there is no strain costs involved.

As an employer you do have the discretion to waive any reductions that may be applicable. If you do choose to waive the reductions, there will be a strain cost payable.

Additional Pension – Awarded by employer

Under the regulations, the employer can award any member with an extra amount of annual pension. The maximum for 2016/17 year is £6,675. . This figure is likely to increase in future years in line with inflation.

This award can be made by an employer at any time – it is not restricted to those who are retiring. Please note that if additional pension is awarded, there will be a strain cost payable.

Important Information – MUST be completed in all cases or this form will be returned unactioned

This section is required where you have ticked any of the “Retirement – Leavers” options.

In order for the ERPF to be able to send the member their retirement figures and claim forms , the employer must have forwarded an estimate form to the ERPF. If one has been sent in the last six months, you do not need to forward another. However, if no estimate has been requested previously, then you must supply either an estimate form or, if the date of leaving has already passed, pages 3 and 4 of the leaver form confirming the members pay information.

Options may be delayed if this section is omitted.

The leaver form should include details of the member of staff who has completed the relevant parts of the form. The ERPF will have a point on contact should they need to make further enquiries.

Contractual Hours for the Final Year

Please confirm the member's contractual hours worked over the final year. Show any changes to either the contractual hours or the term time formula. If the member worked casual, simply write "Casual" in the relevant field as no further information is required.

Pay and Contribution Details

Contribution Details

Basic Pension Contributions

This is the amount of member pension contributions paid over a period of time – the periods are specified on the leaver form. The ERPF ask for confirmation of a previous year pension contributions as the previous year end details supplied may not have posted to the member record.

Remember that any pensionable payments which are paid in one year but relate to a previous year should be reflected in the correct box.

If the member has been on reduced or nil pay through sickness or absence, you need to simply quote the amount of contributions that they paid – it is not uprated to full time or a full year. You do not include any contributions deducted for an Additional Pension Contributions (APC) contract.

If the member has been on nil pay through sickness for a full year, please still write "Nil" or "£0.00" in the relevant field and provide further information in the Leaver Form Notes section ie "Member on nil pay through sickness so no contributions deducted". This is because, if you left the box blank, it would be queried as the ERPF do not know if the amount is zero or it has been omitted.

Contracted Out earnings

If the member has left employment with less than two years membership in the scheme, they may be entitled to a refund of their pension contributions. The contracted out earnings between the lower and upper limits for (where applicable) are used to calculate the refund. Due to the changes in the State Pension, contracting out is no longer applicable from 6 April 2016.

If the member does not have any contracted out earnings between the lower and upper earnings limit, please write "Nil" or "£0.00" in the relevant fields. This is because, if you left the box blank, it would be queried as the ERPF do not know if the amount is zero or it has been omitted.

Additional Contributions (if relevant)

If the member was paying additional pension contributions into the LGPS to purchase extra benefits, please quote how much they have paid in both the final year and the previous year in the relevant fields.

Career Average Re-valued Earnings – CARE (2014 Scheme)

Main Section Cumulative Pensionable Pay/Assumed Pensionable Pay

This figure is the actual amount of pensionable pay that the member received over a period of time – the periods are specified on the leaver form. The ERPF ask for confirmation of a previous year pensionable pay as the previous year end details supplied may not have posted to the member record. The figures do not require uprating to a full time equivalent nor do they need uprating to a full year (if only worked a part year). If the member works term time, this is not uprated to take into account the formula. The figure quoted in these boxes should be the member's actual pensionable pay.

If the member has spent some time in the 50/50 section of the scheme then this will need to be reflected on that section of the form. If the member has been in the main section and the 50/50 section during a financial year then both sections will need completing.

The employer should have previously made the ERPF aware of any change from the main section to 50/50 and vice versa.

Remember that any pensionable payments which are paid in one year but relate to a previous year should be reflected in the correct box.

Where a member has been on reduced pay due to sickness or been absent through ordinary parental leave, you will need to quote the Assumed Pensionable Pay (APP) for this period. To calculate a members APP you will need to average out the last three months that the member was on full pay – including any regular extra's but not including any annual or one-off extra's. This figure will then need up-rating to a full year (but not full-time) and then applied to the reduced pay period.

The APP should have already been calculated as the employer contribution rate is based upon this figure during any periods of absence through ill health or parental leave. The member payments are still based upon their actual pay they receive.

50/50 Section Cumulative Pensionable Pay/Assumed Pensionable Pay

This figure is the actual amount of pensionable pay that the member received over a period of time whilst contributing in the 50/50 section of the scheme - – the periods are specified on the leaver form. The ERPF ask for confirmation of a previous year pensionable pay as the previous year end details supplied may not have posted to the member record.

The figures do not require uprating to a full time equivalent nor do they need uprating to a full year (if only worked a part year). If the member works term time, this is not uprated to take into account the formula. The figures quoted in these boxes should be the member's actual pensionable pay.

The employer should have previously made the ERPF aware of any change from the main section to 50/50 and vice versa.

Remember that any pensionable payments which are paid in one year but relate to a previous year should be reflected in the correct box.

Where a member has been on reduced pay due to sickness or been absent through ordinary parental leave, you will need to quote the Assumed Pensionable Pay (APP) for this period. To calculate a members APP, you will need to average out the last three months that the member was on full pay – including any regular extra's but not including any annual or one-off extra's. This figure will then need up-rating to a full year (but not full-time) and then applied to the reduced pay period.

The APP should have already been calculated as the employer contribution rate is based upon this figure during any periods of absence through ill health or parental leave. The member payments are still based upon their actual pay they receive.

Assumed Pensionable Pay for Ill Health Retirements or Death in Service Cases

This field only needs completing where the member has either retired on the grounds of ill health or where the member has died in service. It does not need completing for any other type of leaver.

In order to calculate this figure you will need to average out the last three months that the member was on full pay – including any regular extra's but not including any annual or one-off extra's. This figure will then need up-rating to a full year (but not full-time).

Final Pay (2008 definition)

This section will only need completing if the member has LGPS pension benefits prior to 01 April 2014 therefore if the member started with you after this date, you do not need to complete this section. After investigating further the ERPF may still require this information as they may have transferred in other LGPS benefits which you would be unaware of.

Final Years Pay from: to:

Under the 2008 regulations, a member's pre 1 April 2014 benefit is based on their full time equivalent pay over the final year. The "from:" and "to:" fields should reflect the last year of employment. For example, if a member ceased employment on 20 September 2016, the final years pay will be calculated from 21 September 2015 to 20 September 2016.

If the pensionable service was for less than a year, the “from:” field will be the date the member started contributing to the scheme.

Please state one year’s full time equivalent final pay

This is the pay figure that is used to calculate any pension benefits that the member has built up prior to 1 April 2014. It is the average of the members full time equivalent pensionable pay received over the final year. This figure should average out any pay increases in that 12 month period and should include any pensionable extras that the member received over that period – with the exception of non-contractual overtime.

If the member works term time, this figure does need reducing to take into account the formula.

If the member has any reduced or nil pay for either sickness or ordinary parental leave, then the pay they would have received had they been at work is used in the calculation – you do not use the APP figure.

If the member has not been in the pension scheme for a full year or if the member has a period of unpaid leave then the figure that you will have worked out will not be for a full year. Therefore, you will need to uprate this figure to a full year.

For example, a member’s final pay period runs from 1 September through to 31 August however, within that year the member had a period of unpaid leave covering all of March. When calculating the final pay you will calculate the full time equivalent pay that the member received for the period 1 September to 28 February and 1 April through to 31 August. This will only cover 334 days so the figure calculated will then need up-rating to a full year by multiplying it by (365/334).

Actual rate of full time equivalent pay/salary on final day of membership

This is the full time annual pay figure that the member is paid on the last day of employment. It is not the average of the pay over the final 12 months. If the member works term time, this figure does need reducing to take into account the formula and should also include any pensionable extras that the member receives if they are contractual.

Multiple Concurrent Employments

Where a member has more than one post then the regulations state that each job requires a separate pension record therefore, if a member ceases one post but continues with the second, a leaver form will be required quoting the relevant information just for that post which ceases.

As the member has options regarding combining their two periods of concurrent benefits, the ERPF do require you to quote the members full-time equivalent pay on the ongoing post at the day the member ceases their other post. The pay figure that needs quoting is the 2008 definition of pay (i.e. the full time equivalent pay figure that the member was on at the time). Any full time equivalent pay figure quoted will need reducing for any term time formulas that are applicable.

Leaver Form Notes

In this section, you can add any additional information that you believe will be of use to the ERPF in order to accurately calculate the members benefits. These can include:

- Details of any absences in the final 12 months.
- Confirmation if the member was on reduced or nil pay through sickness before leaving.
- Details of any drops in the full time equivalent pay in the final 12 months.

Frequently Asked Questions

1. When should a leaver form be sent to the ERPF?

The answer is as quickly as possible but priority should be given to members who have access to immediate payment of their pension benefits.

If the member is retirement, the leaver form should be sent to the ERPF as soon as you are made aware. Any delay in supplying this form will also delay the options to the member and subsequent payment. If the member contacts the ERPF and information is missing the member will be directed back to their employer. If the retirement leaver form has not been received within five working days from the date of leaving then ERPF will, if resources permit, begin to chase the outstanding information.

If the member is non retirement leaver, the leaver form will still need to be sent to the ERPF as soon as possible however these are not as high priority as a retirement. The only exception to this is if the member is looking at transferring their benefits as soon as possible. If the leaver form has not been received within six weeks from the date of leaving, then the ERPF will begin chasing the form.

2. If a member extends their leaving date using holidays – what should I put on the leaver form?

If a member finishes working on a certain date but then uses annual leave, the date on the leaver form should be the actual last day following annual leave. For example, a member finishes in the office on 12 July 2016 but uses two weeks of holiday so does not officially finish employment until 26 July 2016 then the date for the leaver form would be 26 July 2016.

If a member finishes work but their unused holiday is paid as a one-off payment (i.e. pay in lieu of holidays), this payment is not pensionable so the date of leaving would be their last day.

If a member works Monday to Friday and they finish work on a Friday then their last day of employment should be the Sunday unless they clearly specify otherwise. This is because if they finish with one employer and start with a new employer on the following Monday, they will have continuous service. .

If a member works term-time and they finish work at the end of the summer term, then their leaving date would be 31 August.

3. For ill health cases, do we have to review the decision the IRMP states or can we just go with what they are stating?

The LGPS regulations are very clear on this matter. Where a member is applying for ill health retirement, they must be referred to an IRMP for their medical recommendation. Once they have made their recommendation, the case must be referred back to the employer to review this decision and decide on how to proceed. The regulations clearly state that ill health approvals are an employer decision, you should not simply go with the IRMP recommendation.

There have been several complaints made under IDRPs on this matter and the cases have been referred back to the employers. The IDRPs do not overturn the decision, it forces the employer to restart the case and make their own determination in line with the Regulations.

4. Do you always include any extras in the APP calculation?

Not always. If there are any regular, monthly payments that the member receives, these are included in the three month averaging. If there are any single or annual payments made, these are not included in the averaging out.

For example: A monthly paid employee has received the following pensionable pay in the three complete months prior to the relevant event.

Month 1 - £1,400

Month 2 - £2,500 (including a £1,000 regular bonus and £100 overtime)

Month 3 - £1,400

The calculation of APP is as follows:

Annual rate of APP = $(£1,400 + £1,500 + £1,400) / 3 * 12 = £17,200$

Note that the £1,000 bonus is removed prior to the averaging and grossing up calculation. As to whether you then add this amount back on to the annual APP figure is an employer decision and something you must make a policy on. The ERPF does not need to know this policy however you must make a decision on this to ensure it is consistent across all cases.

5. How does a leap year affect all of this?

When it comes to the CARE pay figures, as you add up what pay that person has received for the year, the leap year will make no difference.

In regards to the 2008 definition of final pays, a leap year does not affect those monthly paid staff. The reason for this is, they do not get paid extra for the additional day of employment. However, where a member is weekly paid, they do get credited for the additional day. Therefore, the leaver form would need to cover the last 365 days for weekly staff. For example, if a member of staff finished on 14 March 2016 (2016 is a leap year), then the final year for the leaver form should cover:

- For monthly paid staff – 15 March 2015 to 14 March 2016
- For weekly paid staff – 16 March 2015 to 14 March 2016

6. Once completed, where should I send the leaver form?

To continue working as a paperless office, the best and quickest way to get the leaver form to the ERPF is by email. The leaver form can be emailed to either:

erpf@eastriding.gov.uk

or

leavers@eastriding.gov.uk

The admin teams will then arrange to get the form onto the record. Alternatively, the leaver form can be faxed across. The fax number is 01482 394186. Finally, the leaver form can be posted to the ERPF at their address:

East Riding Pension Fund
PO Box 118, Council Offices
Church Street
Goole
East Riding of Yorkshire
DN14 5BR

Employee leaver form (Post 31 March 2014 leaver)

Failure to complete all sections of this form will result in the form being returned to you without being processed

Employer:

Member Details

Full name:	<input type="text"/>	Mr	Mrs	Miss	Ms
Address:	<input type="text"/>				
	<input type="text"/>				
	Postcode:				
	<input type="text"/>				
Job title:	<input type="text"/>				
Payroll Number (including pay source)	<input type="text"/>				
Department:	<input type="text"/>	NI No:	<input type="text"/>		
Date of Birth:	<input type="text"/>	Date of leaving this post / opt out:	<input type="text"/>		

Reason for Leaving

Non-Retirement leaver

Resignation	<input type="checkbox"/>	Including any leavers aged 55 to 59 where you are <u>not</u> submitting a Notification of Retirement form
End of Fixed Term Contract	<input type="checkbox"/>	
Opt Out	<input type="checkbox"/>	You MUST submit a copy of the employees signed opt out form
Dismissal	<input type="checkbox"/>	Reason: Financial <input type="checkbox"/> Non-financial <input type="checkbox"/>
Redundancy - under age 55	<input type="checkbox"/>	

Death in Service

Please supply name and address of Next of Kin	<input type="text"/>
	<input type="text"/>
	<input type="text"/>

Leaver form notes for Non Retirement leavers

Contact Details

Completed By:	<input type="text"/>	Signed:	<input type="text"/>	Date:	<input type="text"/>
Position:	<input type="text"/>	Telephone Number:	<input type="text"/>		

Retirement – Leavers		
Voluntary Leaver – Over age 55	<input type="checkbox"/>	<p>The Employer’s Discretionary Policy has been checked.</p> <p>Full reductions will apply unless stated otherwise.</p> <p>Actuarial reductions for pre April 2014 benefits can only be waived on compassionate grounds. For post April 2014 benefits, actuarial reductions can be waived on any grounds.</p> <p>WAIVE REDUCTIONS - I confirm that where strain costs are applicable these will be paid by a single lump sum <input type="checkbox"/></p>
Voluntary Leaver – Over age 55 to eve of 60 th birthday and switching on Rule of 85	<input type="checkbox"/>	<p>The Employer’s Discretionary Policy has been checked.</p> <p>I confirm that where applicable strain costs will be paid by a single lump sum.</p>
Retirement - Ill health	<input type="checkbox"/>	<p>Note: The Ill Health Certificate should have already been provided. If not you need to submit this now.</p> <p>Please state TIER:</p>
Efficiency of Service – over age 55	<input type="checkbox"/>	I confirm that where applicable strain costs will be paid by a single lump sum.
Redundancy - over age 55	<input type="checkbox"/>	
Flexible Retirement	<input type="checkbox"/>	<p>The Employer’s Discretionary Policy has been checked.</p> <p>Full reductions will apply unless stated otherwise.</p> <p>WAIVE REDUCTIONS - I confirm that where strain costs are applicable these will be paid by a single lump sum <input type="checkbox"/></p>

Additional Pension – Awarded by employer		
Additional Pension	<input type="checkbox"/>	<p>The Employers Discretionary Policy has been checked.</p> <p>The member has been awarded an Additional Pension of £</p>

Important Information – MUST be completed in all cases or this form will be returned unactioned													
Have you, as the employer, previously requested an estimate of pension benefits to be sent to the member?								YES / NO					
If YES , please confirm the date this was sent to the Pension Section.													
If NO , you <u>must</u> complete and attach an estimate request form or the remainder of this form confirming pay information. Please note - The member will not be sent details of their potential benefits until the necessary details are supplied.													
WITHOUT AN ESTIMATE OF BENEFITS, THE MEMBER MAY LOSE THE RIGHT TO EXCHANGE PART OF THEIR PENSION FOR A BIGGER LUMP SUM AS THE MEMBER MUST ELECT TO DO THIS BEFORE THE BENEFITS ARE PAID													
If strain cost payable, please confirm the date the Employer agreed the retirement:													

I confirm that the details provided above comply with the employer’s discretionary policy					
Completed By:		Signed:		Date:	
Position:		Telephone Number:			

Employee leaver form (continued) (Post 31 March 2014 leavers)

Employee's full name:			
Payroll Number (including pay source):			
Date of leaving / opt out date:		NI Number:	

Contractual Hours for the Final Year (please complete in all cases)			
From	To	Actual hours worked (plus formula if applicable) Enter 'C' if casual	FTE Hours

Pay and Contribution Details

Contribution Details		
BASIC pension contributions	1 April 2016 to DOL	£
	1 April 2015 to 31 March 2016	£
Contracted out earnings between the lower and upper limits (up to 3 years needed if member has been in the scheme for less than 2 years at date of termination). Note: Contracted out ended on 5 April 2016.	6 April 2015 to 5 April 2016	£
	6 April 2014 to 5 April 2015	£
	6 April 2013 to 5 April 2014	£
Additional Contributions (where relevant)		
Added Years Contributions	1 April 2016 to DOL	£
	1 April 2015 to 31 March 2016	£
Additional Regular Contributions (ARCs)	1 April 2016 to DOL	£
	1 April 2015 to 31 March 2016	£
Additional Pension Contributions (APCs)	1 April 2016 to DOL	£
	1 April 2015 to 31 March 2016	£

Career Average Re-valued Earnings - CARE (2014 Scheme)

Main Section Cumulative Pensionable Pay/Assumed Pensionable Pay	1 April 2016 to DOL	£
	1 April 2015 to 31 March 2016	£
50/50 Section Cumulative Pensionable Pay/Assumed Pensionable Pay	1 April 2016 to DOL	£
	1 April 2015 to 31 March 2016	£
Assumed Pensionable Pay for Ill Health Retirements or Death in Service Cases		£

Final Pay (2008 definition) Only use this section if member started prior to 1 April 2014

Final Years Pay	from :	to :	
Please state one year's full time equivalent final pay:			£
Actual rate of full time equivalent pay/salary on final day of membership:			£

Multiple Concurrent Employments

If the member has other pensionable employment(s) with you, which are continuing and have run concurrently, please provide the full time equivalent pay/salary in **each** post at the date of leaving this post

Job Title:		Pay:	£
Job Title:		Pay:	£

Contact Details

Completed By:		Signed:		Date:	
Position:		Telephone Number:			

Employee's full name:			
Payroll Number:		NI Number:	

Leaver Form Notes

Contact Details

Completed By:		Signed:		Date:	
Position:			Telephone Number:		

Under three month opt out confirmation

Employer:

Member Details

Full name:

<input type="text"/>	Mr	Mrs	Miss	Ms
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Address:

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>

Postcode:

Payroll No:

NI No:

<input type="text"/>											
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Date LGPS membership began in this post:

<input type="text"/>					
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Date member opted out:

<input type="text"/>					
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Gross amount of pension contributions paid: £

Declaration

I confirm that I have refunded the pension contributions paid by the above employee and that I have also corrected the national insurance contributions

or

I confirm that the member did not have any pension contributions deducted from their pay

Employer Details

Completed by:

Signed:

Date:

<input type="text"/>					
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Position:

Telephone Number:

Send completed form to: East Riding Pension Fund, PO Box 118, Council Offices, Church Street, Goole, East Riding of Yorkshire, DN14 5YU