NHS Pensions

Retirement on grounds of Interest of Efficiency (IOE)

**Eligibility checklist**

This form should only be completed in circumstances where the reason for retirement on the AW8 has been completed as ‘Early Retirement (IOE)’.

Please confirm the following criteria have been met through the relevant business case to enable NHS Pensions to validate the retirement claim and process the award entitlement.

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|  | Evidence that suitable alternative employment or reduced hours/grade has been considered but not available/appropriate. |
|  | Evidence on business case that REMCOM is satisfied that this option is the best value available. |
|  | As resignation, ordinary redundancy or ordinary early retirement were not options available to the Board. |
|  | The employment contract references Section 16 of Agenda for Change Terms and Conditions of service or has explicit terms in their contract that qualifies them for Interest of Efficiency. |
|  | The business case has been signed by the accountable officer of the organisation. |

Please send this form as an electronic attachment to [polia3@nhsbsa.nhs.uk](mailto:polia3@nhsbsa.nhs.uk) if the AW8 has been completed through POL. If the AW8 has been completed on paper then attach this checklist to the form.

Completed by:       Position:

Date:      