



# **PRE-RETIREMENT SEMINAR: SEPARATION: ADMINISTRATIVE FORMALITIES**

15 NOVEMBER 2023



**UN GENEVA**  
UNITED NATIONS OFFICE  
AT GENEVA

Human Resources Management Service  
Contract Management Unit

# AGENDA

- ❑ Retirement age
- ❑ Roles and check out activities
- ❑ International entitlements
- ❑ Final payments
- ❑ Employment of retirees
- ❑ Main references



*The administrative instructions, rules and regulations that are mentioned in this presentation, are mainly applicable to UNS staff and staff of organizations applying UN staff rules & regulations. For any other organizations, please contact your HR focal point, as relevant rules, regulations, procedures may differ.*



# Age requirements for Normal, Early and Deferred Benefits

Your age + the year you joined the organization are important factors in determining your eligibility for pension benefits:

## **1. Normal Retirement Age (NRA)**

You retire at:

- 60 if your entry into the Fund was before 1 Jan 1990
- 62 if your entry into the Fund was on or after 1 Jan 1990
- 65 if your entry into the Fund was on or after 1 January 2014

## **2. Early Retirement Age**

- 55 years if your entry into the Fund was before 1 Jan 2014
- 58 years if your entry into the Fund was on or after 1 Jan 2014

## **3. Deferred Retirement Age**

- You leave the Organization before 55 and decide to leave your money in the Pension Fund until 55 or your normal retirement age



# Who is involved and what are their roles in the separation process?

## **Staff Member**

- Notifies HR/admin focal point of retirement (early retirement or retirement before age of 65 **only**)
- Completes all check out activities
- Requests Retiree ID

## **Executive Office/Admin. focal point**

- Confirms separation to HR Partner
- Finalizes and submits departmental clearances
- Requests Letter of Appreciation (20+ years)

## **Time Manager/supervisor**

- Approves Time & Attendance
- Finalizes ePerformance appraisal

## **HR Partner**

- Launches HR clearances
- Determines entitlements
- Processes Separation & Separation Payments PAs
- Processes travel/shipment
- Approves Retiree ID
- Prepares employment certificate upon request
- Processes Repatriation Grant

## **Responsible Office**

- Clears the item under their responsibility

## **Travel & Shipment**

- Approves travel & shipment requests
- Approves insurance

## **Payroll**

- Reviews SM payment history
- Advises HR of corrective action
- Approves and releases final pay
- Submits PF4 form to Pension Fund

## **Pension Fund**

- Processes Pension benefits



*Suggested timeline:* <https://hr.un.org/page/leaving-un>



*Timely completion of all steps is essential for prompt settlement of final emoluments, and payment of pension benefits.*



# Check out activities under Staff Member's responsibility



## Separation procedures

- Update your personal data
- Verify/update beneficiary
- Submit/validate time and attendance records and certify all monthly/yearly statements
- Settle all outstanding claims and obligations
- Complete ePerformance document/s (for you and for staff you supervise)
- Provide/confirm payment instructions
- Return CDL, UNLP (if applicable)
- Return UN property
- Request travel & shipment (if applicable)
- Undergo a medical examination (optional)



## Pension Fund

- Fill out and submit pension required documents; register to UNJSPF website to have access to your personal pension fund documents and to explore pension options



## Insurance

- Contact your UN Health Insurance Office for ASHI/ASLI eligibility/options
- If you wish to enroll to the UN After Health Insurance Plan this must be done prior to your separation from active service



*Please note that the list is not exhaustive, and your Office may have other or additional check-out activities*



## Outstanding Claims

- Travel expense reports claim(s)
- Education grant claim(s)
- Rental subsidy claims(s)
- Dependency allowance claim(s)

(Any NEW dependents should be recorded in the system).



*See Staff Rule 3.15 (retroactivity of Payments).*

## Outstanding Obligations

- Salary advances
- Education grant advances
- Travel expense reports
- Tax advances
- Telephone bills
- Loans



*Outstanding amounts will be deducted from final payment if not settled.*



# Return UN Property (as applicable)



WORK PERMIT



MEDICAL  
INSURANCE  
CARD



LAISSEZ-  
PASSER (UNLP)



OFFICE/ELECT  
RONIC  
EQUIPMENT



CAR STICKER,  
ID CARD



CAR PLATES /  
PETROL CARD



LIBRARY  
MATERIAL



ARCHIVES /  
FILES



ALL OFFICE  
KEYS



*Please note that the list is not exhaustive, and your Office may have other or additional check-out activities*



# International Entitlements: Travel and Shipment

If you are internationally-recruited, you may be entitled to repatriation travel for yourself and recognized dependents; a request should be submitted to HRMS for:



- ✓ Authorization for travel to the place of recruitment or home leave\* (ticket issued only, no lump-sum option);



- ✓ Payment of travel time (upon separation);



- ✓ Authorization for shipment (can be organized and paid by the UN or payment of relocation grant);
- ✓ Insurance of personal effects.

*\*Staff Rule 7.2 (c): "[...] . Should a staff member, on separation, wish to go to any other place, the travel expenses borne by the United Nations shall not exceed the maximum amount that would have been payable for the return of the staff member and eligible family members, if appropriate, to the place of recruitment or home leave, as applicable."*



- *To allow timely issuance of the necessary authorizations the staff member needs to inform the responsible HR officer of the travel/removal plans at least 21 days in advance.*
- *Submission of Expense Report (Travel Claim) is required (within 14 calendar days).*
- *Entitlement to travel, unaccompanied shipment/ relocation shipment ceases if not yet exercised within two years after separation date.*





# International Entitlements: Repatriation Grant

Repatriation Grant may be payable upon separation of internationally-recruited staff who:

- ✓ The Organization is obligated to repatriate after at least five years of qualifying service;
- ✓ Resides outside his or her home country and country of nationality while serving at the last duty station;
- ✓ Is repatriated to a country outside the country of last duty station;
- ✓ Has not been dismissed or separated from service for abandonment of post;
- ✓ Provides documentary evidence of relocation outside of the country of the last duty station.

(i.e., original sworn statement made before a Notary Public, Commissioner of Oaths or similar official (e.g., the *Mairie* in France))



*Entitlement to repatriation grant ceases if not yet claimed within two years after separation date (Exception: spouse employed by the UN).*



# Final Payments

- ❑ The final payment, including last salary, will normally be released within one month after the separation personnel action is processed by the HR Partner.
- ❑ Final payments and separation personnel action cannot be approved until all clearances have been obtained (P.35/E-clearance).
- ❑ Repatriation grant will be paid upon receipt of a documentary proof of relocation.
- ❑ Payment of your pension benefits are made separately, once the final pay is disbursed by the Payroll Unit.



*The responsible payroll office cannot send your separation notification to the Pension Fund Office until all the formalities mentioned herewith have been completed and processed.*



# Employment of Retirees

- ❑ Reemployment: three months break for staff contracts; one month break for consultants/individual contractors' assignments.
- ❑ For staff, no re-employment at a level higher than that at which staff member separated.
- ❑ For consultants, level of remuneration depends on the nature of assignment.
- ❑ If in receipt of a pension benefit from UNJSPF the following limitations apply:
  - Max US\$22,000 or 6 months cumulative per calendar year;
  - Language staff: max 125 days actually worked per calendar year.
- ❑ For staff appointments of more than 6 months, pension contribution to UNJSPF will resume.



# Main References

Topic	Applicable Rule/Provision
Accrued Annual Leave	Staff Rule 9.10
Certification of Service	Staff Rule 9.14
Employment of retirees	ST/AI/2003/8
Excess baggage, shipments and insurance	Staff Rule 7.12 / 7.13, ST/AI/2016/4
Relocation Grant	ST/AI/2016/4 ST/IC/2017/35
Repatriation Grant	Staff Rule 9.12 and 13.6, Annex IV to Staff Regulations ST/AI/2016/2
Restitution of advance annual and sick Leave	Staff Rule 9.11
Retirement	Article 9.2 of the Staff Regulations Staff Rule 9.5
Travel and relocation expenses	Staff Rule 7.1-7.10, ST/AI/2013/3

- Separation checklist and forms (to be received from your HRP via email for staff members administered by UNOG)
- Annual leave Umoja tutorial: [ESS / MSS | UMOJA \(un.org\)](#)
- UN Travel policy and contact information: [Travel Sub-Unit | iSeek](#)
- UN Joint Staff Pension Fund: [Separating or retiring – UNJSPF](#)
- UN Health and Life Insurance: [Retirees | Health & Life Insurance Section \(un.org\)](#)
- UNSMIS: [Retirement | UNSMIS \(unog.ch\)](#)
- Client Support Service [Client Support Centre \(unog.ch\)](#) for staff members administered by UNOG



THANK YOU



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