

## Registered Nurse/Midwife Workforce Renewal Early Retirement Scheme (2019)

This Fact Sheet provides information on the Early Retirement Scheme for nurse/midwives who may wish to apply for the Scheme's once off incentive payment.

New graduates and early career nurses and midwives seeking to apply for a vacancy generated by the Early Retirement Scheme should refer to Fact Sheet 2 titled *Registered Nurse/Midwife Workforce Renewal Early Retirement Scheme (2019) - Recruitment* for further information.

### What is the Program/Scheme?

The Registered Nurse/Midwife Workforce Renewal Program 1 (NMRP1) – also known as the Early Retirement Scheme (2019), provides a maximum lump sum incentive payment of \$50,000 to Registered Nurses/Midwives (RN/Ms) Level 1 and Level 2 (part time pro rata) substantively employed in an 'in scope' clinical position with 10 or more continuous years' service with SA Health, and who are aged 60 years and over, to retire early.

In order to receive a concessionally taxed early retirement Scheme payment, eligible RN/Ms must retire and receive payment under the Scheme before they turn 65 years of age.

The Nursing/Midwifery (South Australian Public Sector) Enterprise Agreement 2016 (NMEA 2016) which came into force on 1 February 2017 includes, in Part 8, clauses relating to workforce renewal.

The Scheme is a significant initiative designed to rejuvenate the nursing/midwifery workforce and address intergenerational change by creating an incentive opportunity for nurses/midwives to leave their jobs earlier than may otherwise have been the case, and for graduates (RN/Ms Level 1, Year 1) and early career nurses/midwives (RN/Ms Level 1 Year 2) to join the SA Health workforce as ongoing employees.

### What are the implications for applicants aged 65 year and over?

In order to receive a concessionally taxed early retirement Scheme payment, eligible RN/Ms must retire and receive payment under the Scheme before they turn 65 years of age.

The Scheme is not designed to exclude RN/Ms over the normal pension age (65.5 years rising to 66 from 1 July 2019). However, there are requirements associated with taxation on the separation payments that may be relevant if the applicant is aged 65 or over when the payment is made.

**RN/Ms who will be aged 65 years or over when the incentive payment is made should seek independent financial advice regarding tax implications of their resignation payment.**

### When do applications for the Scheme open and when will payments be made?

**NMRP1 Early Retirement Scheme (2019) Round 2:** Applications will open on 1 October 2019 and close on 25 October 2019 with payments made to successful applicants on 26 June 2020. These dates **are not** negotiable.

Dates for the Scheme's recruitment phase will be advised shortly.

### What is the lump sum incentive payment worth?

The one-off lump sum incentive payment is \$50,000 upon resignation of employment for full time and a pro rata payment for part time RN/Ms Level 1 and Level 2 who meet the agreed eligibility criteria, within an 'in-scope' clinical position.

For part-time RN/Ms who have worked additional hours, such additional hours will be averaged over the previous 12 months and added to the pro rata calculation which will be calculated by Shared Services SA.

#### **Will my accrued leave entitlements be included in the payment?**

All RN/Ms terminated under the Scheme will receive the relevant employee benefit entitlements such as accrued annual, retention and long service leave, as well as other benefits to which employees are entitled. However, these entitlements do not form part of the payment made under the Scheme.

#### **What independent advice should I seek when considering an incentive payment?**

Employees considering an offer of the \$50,000 incentive payment should obtain personal independent taxation, financial and superannuation advice specific to their personal circumstances which will be at their own expense.

#### **How many positions will be available for each round of the Early Retirement Scheme?**

**Early Retirement Scheme Round 2:** A total of eighty-five (85) packages will be allocated.

Allocation of packages across the Local Health Networks is as below:

• Central Adelaide Local Health Network	19 FTE
• Northern Adelaide Local Health Network	18 FTE
• Southern Adelaide Local Health Network	18 FTE
• Women's and Children's Health Network	18 FTE
• Barossa Hills Fleurieu Local Health Network	2 FTE
• Eyre and Far North Local Health Network	2 FTE
• Flinders and Upper North Local Health Network	2 FTE
• Limestone Coast Local Health Network	2 FTE
• Riverland Mallee Coorong Local Health Network	2 FTE
• Yorke and Northern Local Health Network	2 FTE

Packages will be distributed as Full Time Equivalent (FTE).

#### **Who is eligible to apply for the Early Retirement Scheme?**

The Scheme is open to:

- Registered Nurse/Midwife Level 1
- Registered Nurse/Midwife Level 2 (Clinical Nurse/Midwife)
- Registered Nurse/Midwife Level 2 (Associate Nurse/Midwife Unit Manager)

To be eligible, applicants must:

- Be an employee of SA Health.
- Hold current registration as a Registered Nurse or Midwife with the Nursing and Midwifery Board of Australia.
- Be substantively classified or have a 'right of return' to an RN/M Level 1 or Level 2 role in an 'in-scope' clinical position.
- Be permanently employed as a RN/M Level 1 or Level 2 in an 'in-scope' clinical position as specified.
- *Refer to the Appendix for each LHNs 'in-scope' clinical position listing.*
- Be at least 60 years of age as at:
  - 1 October 2019 for Round 2 of the Scheme.
- Have completed 10 years' continuous service as an RN/M Level 1 or Level 2 within SA Health, calculated as at:
  - 1 October 2019 for Round 2 of the Scheme.
- Be either a full-time or part-time employee.
  - *Payment will be on a pro rata basis.*

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- Not have any outstanding current workers compensation claims and have finalised all such claims
  - *RN/Ms receiving non-medical payments under workers compensation (paid leave from the employees' normal workplace referred to as income maintenance), may affect eligibility. It is recommended that employees contact their Claims Officer for clarification.*

Registered Nurses/Midwives on Leave Without Pay such as parental leave, and Leave With Pay such as personal carers leave, retention leave, annual leave, long service leave are eligible to apply as long as they have met the above-mentioned eligibility criteria. If you are unsure whether or not you have a substantive position or a 'right of return' please contact either your line manager or Human Resources Unit for clarification.

#### **What if I met the Scheme's eligibility criteria but I am acting in another role or on secondment?**

RN/Ms Level 1 or Level 2 who may be acting in another role, on a temporary contact in another role and/or on secondment in another role and have a right of return to their substantive (permanent) role within and approved in-scope clinical position, and meet the Scheme's eligibility criteria in full would be eligible to apply.

#### **What happens if I meet the eligibility criteria and have already resigned?**

Any nurse/midwife who is eligible but has already submitted their resignation **will not** be entitled to receive the Scheme payment.

#### **What happens if the Scheme is oversubscribed?**

In the event that the Scheme is over-subscribed with eligible applicants, packages will be offered to eligible RN/Ms with the longest service within SA Health.

#### **Who will determine the 'in-scope' clinical positions and where they are located?**

The Executive Directors of Nursing and/or Midwifery (EDONMs) will identify the 'in-scope' clinical positions for their respective LHNs including the number of positions to be offered within their quota allocation.

To see the listing of 'in-scope' clinical positions for your LHN refer to Appendix 1.

#### **Why might some nurses/midwives in some areas be 'in-scope' and others not?**

In determining the 'in-scope' clinical positions, consideration must be given to the LHNs workforce, as well as, service and patient care need (for example, location of vacancies and appropriate skill mix for the clinical area). In some areas (eg speciality units) the numbers of packages on offer may be limited due to the need to replace with an early career nurse and/or midwife. In this instance the eligible RN/RM with the longest service with SA Health will be preferred.

This will mean that not every similar role or ward/unit across a LHN or even between LHNs will be considered 'in-scope' because each has unique and individual requirements. Therefore, you may see in one service area RN/Ms have been included but in another service area they may not be considered 'in-scope'.

#### **Who is going to backfill the positions that are vacated?**

The making of an offer in the Scheme must create an entry-level RN/M Level 1 Year 1 or 2, vacancy.

The normal recruitment process will be undertaken to fill the vacancies with eligible RN/Ms.

### **Will any assurance or guarantees be made once I apply?**

No assurance or guarantees will be made to applicants for a package until such time as a formal offer is made.

### **How will the application process be managed?**

Each LHN will establish a Project Team (to be known as the selection panel) to administer and implement the Scheme locally.

### **Is the Early Retirement Scheme voluntary?**

This opportunity is offered on a voluntary basis and it is up to in-scope RN/MS to decide if they would like to nominate for the Scheme or not.

### **How will I know when the Scheme is open?**

Notification of the Scheme opening will be publicised via a Chief Nurse and Midwifery Officer Executive Update.

### **Where do I apply for the Early Retirement Scheme?**

Applications must be submitted through the [SA Health Careers website](#).

At any stage that you do not meet the eligibility criteria when completing the online application, the eRecruitment system will not allow you to progress with your application.

If you require assistance with the eRecruitment online application system please contact either your line manager or LHN HR Team.

### **What correspondence will I receive after I submit my application?**

An acknowledgment letter/email will be sent to applicants when the information provided on the online application form has been verified as true and accurate.

### **How will my application be assessed?**

The assessment process will be conducted and administered by the LHN selection panel who will evaluate each application to ensure objective assessment against the eligibility criteria.

The selection panel will ensure that applications are managed in a confidential manner using best practice human resource principles and processed in accordance with the eligibility criteria.

When deciding on whether to recommend an offer to an applicant, the LHN selection panel will apply the following considerations:

- the applicant satisfies all of the eligibility criteria; and
- there is verification of the applicant's records and support for the application by the employing LHN.

Matters relating to work performance will not form part of the selection process.

### **What is the approval process for the Scheme?**

The selection panel will forward recommendations regarding successful applicants to the LHN Workforce Executive/Director for endorsement with final approval provided by the Chief Executive Officer of the relevant LHN.

The final outcome of the assessment will be communicated to all applicants via the LHN.

Offer letters, including unsuccessful letters, will be sent out by the LHN.

Once the offer has been accepted by the applicant in writing the LHN Workforce Executive/Director will notify the successful applicants' unit/divisional managers so that contract and vacancy management purposes can commence.

The applicants will discuss the successful application with their unit/divisional managers, giving notice of their resignation from the SA public sector with an agreed separation date of 19 June 2020.

The LHN Human Resources Unit will coordinate completion of the relevant separation HR Forms with the retiring Scheme participant and facilitate the separation payment with Shared Services.

#### **Will my line manager be informed of my application?**

Yes, your line manager will be aware of your application for leave planning requirements. Your line manager will be required to sign off on any leave you have booked from 21 December 2019 to 19 June 2020.

#### **How long will I have to accept an offer?**

The decision to accept an offer of separation is voluntary.

Successful applicants will have **three weeks** from the date of the offer, to either accept or decline that offer in writing.

#### **What happens if I decline/don't accept the offer?**

If you do not accept the offer, the offer will lapse and it will no longer be available to you.

#### **If I accept the offer will I have to resign from the SA public sector?**

If an offer is accepted, the employee voluntarily resigns from the South Australian public sector.

#### **What conditions will I need to abide by if I accept the offer?**

An offer and payment under the Scheme will be subject to a number of conditions related to giving notice, further employment and other matters not limited to:

- The employee voluntarily giving notice of their resignation from the SA public sector.
- The employee resigning from **all** employment in the SA public sector.
- The employee agreeing that he or she will not apply for, accept, engage or remain in any employment whatsoever (whether as an employee, trainee or apprentice) in the South Australian public sector, whether or not remunerated or otherwise and whether temporary, casual, contract, ongoing or by appointment for a period coinciding with the number of months' remuneration paid to them by way of a separation payment, from the date on which the employee's resignation takes effect.
- The employee agreeing that he or she or any associated entity of him or her, will not enter any contract to provide services to a South Australian public sector agency for a period, coinciding with the number of months' remuneration paid to them by way of a separation payment whereby the employee is to personally perform all or a substantial part of the work to be performed under that contract.
- The employee agreeing that he or she will not provide services to a South Australian public sector agency for a period coinciding with the number of months' remuneration paid to them by way of a separation payment, as an employee or contractor of a labour hire agency or other body contracted to provide personnel to carry out work or to provide services for a South Australian public sector agency, that work or services being work or services that would normally be expected to be carried out by an employee of that South Australian public sector agency.

- The employee agreeing that he or she will not, for a period coinciding with the number of months' remuneration paid to them by way of a separation payment, perform the same or similar work functions for a third party, in respect of work required pursuant to a current arrangement, or an arrangement being negotiated at the time the employee received the grant, to be provided by that third party to a South Australian public sector agency. Nothing in this paragraph is intended to prevent the employee from accepting employment where he or she is to perform work or provide services to a body which receives funding from the South Australian public sector to assist it in providing services to the community on a non-profit basis.
- The employee having notified the agency of each and every workers compensation disability.
- The employee not suffering any other compensable injury or disability between the date of the offer of the separation package and the time at which the employee completes his or her final day of service as an employee.
- The employee not having any entitlement, and the employee or their dependent(s) not becoming entitled, to weekly payments of workers compensation.
- The employee not having any outstanding current workers compensation claims and having finalised all such claims.
- The employee (or the employee's estate) repaying an amount equal to the weekly payments up to the amount paid as a separation payment, if any employee receives any subsequent weekly payments for a compensable injury or disability relating to the employee's employment with the agency, relating to any claim for workers compensation arising out of their employment in the public sector.
- The separation payment not exceeding the sum payable in accordance with the terms and conditions of the Scheme. Any amount paid in excess of the sum payable shall be repayable within seven days of demand and any sum incorrectly stated as being payable, shall be adjusted to accurately state the sum payable. The repayment shall be payable and the adjustment shall be made irrespective of the cause or nature of the error or omission.
- Any employment obtained following the acceptance of an Early Retirement Scheme separation payment is gained at arm's-length from influence by the South Australian public sector.

Payments made under the Scheme will be at arm's-length (for example, because they are personally related in some way).

#### **What is the payment under the Scheme in excess of?**

The payment made under the Scheme is in excess of any superannuation and any other benefits to which eligible employees would otherwise be entitled.

#### **Will I be able to roll the 'tax-free' amount over into superannuation?**

The 'tax-free' amount **will not** be able to be rolled-over into a superannuation fund.

#### **What is the grievance process?**

If an employee believes that they have been the subject of any unfair treatment during the implementation of the Scheme, they should raise a concern with their LHN HR Team in the first instance or as outlined in section 3.1 – Grievance and Reclassification Appeal Procedures within the SA Health (Health Care Act) Human Resource Manual.

## Definitions

Definition of terms, refer to comment sections above for some recommended terms:

Graduate Graduate Nurse/Midwife	Registered Nurse/Midwife Level 1, Year 1
Early career Nurse/Midwife	Registered Nurse/Midwife Level 1, Year 1 and Year 2
Nurse and/or Midwife	Registered Nurse and/or Midwife
RN/M	Registered Nurse/Midwife
RN/M L1	Registered Nurse Level 1 RNM0101 – RNM0109
RN/ML L2	Registered Nurse Level 2 RN2A00 – RN2A04 RN2C00 – RN2C09
Temporary contract	A non-permanent contract or contract for a fixed period
NMRP1	Nursing and Midwifery Renewal Program Number 1 Early Retirement Scheme (2019)
LHN Project Team	Local Health Network selection panel, responsible for overseeing the Scheme and applicant selection.
Workforce Director	Executive Director or Director of the Human Resource function within the Local Health Network
EDONM	Executive Director of Nursing/Midwifery
In-scope clinical position	May include a unit, ward and/or service area. Nominated by the LHN Executive Director Nursing/Midwifery
LHN	Local Health Network
CEO	Chief Executive Officer

## References

[Nursing and Midwifery \(South Australia Public Sector\) Enterprise Agreement 2016](#)

[Nursing and Midwifery Strategic Directions 2019 – 2022](#)

[SA Health Strategic Plan 2017 – 2020](#)

[Australian Taxation Office for the Commonwealth of Australia, Class Ruling, Income tax: Department for Health and Wellbeing South Australia Early Retirement Scheme 2019, CR2019/19, 20 March 2019](#)

## APPENDIX

### In-scope clinical positions by LHN

The listing below identifies the approved 'in-scope' clinical positions by each of the LHNs. This listing is to be read in conjunction with the eligibility criteria listed above in this Fact Sheet.

#### Central Adelaide Local Health Network (CALHN)

Directorate	Service Area
<b>Medicine</b>	Hampstead Rehabilitation Service (HRC)
	St Margarets'
	Acute Medicine
	General Medicine
	Complex Medicine
	Medical Specialties
	Adelaide Sexual Health Clinic
	General Surgery
<b>Surgery</b>	Surgical Specialty Areas
	Orthopaedics
	Technical Suites (All Areas) - RAH
	Theatres and Anaesthetics - TQEH
	All Renal Inpatient Areas
<b>Renal</b>	Dialysis Areas
	Inpatient Areas
<b>Cancer</b>	Day Centre Areas
	ED - RAH
<b>Critical Care</b>	ED - TQEH
	ICU - RAH
	ICU - TQEH
	Outpatient Department (OPD)

#### Northern Adelaide Local Health Network (NALHN)

Directorate	Service Area
<b>Medicine</b>	AMU Acute Med Unit
	Cardio Vasc Investigation
	ICS CTG Screening Med
	LMH Cardiac Unit
	LMH Catheter Lab
	LMH Oncology

	LMH Thoracic Procedure
<b>Directorate</b>	<b>Service Area</b>
	LMH Ward 2A
	LMH-Ward 2D
	LMH- Emergency Department
	LMH- Intensive Care Unit (ICU)
	MOD Short Stay
<b>Surgical Specialties and Anaesthesia (SS&amp;A)</b>	LMH 2FX
	LMH Anaesthesia
	LMH Operating Theatre
	LMH Ward 2B
	LMH Ward 2E
	MOD Operating Theatre
	MOD Recovery Nursing
	MOD Ward-23 Hour
	MOD Ward-Day Procedure
<b>Aged Care, Rehabilitation and Palliative Care (ACR&amp;PC)</b>	Centre Disability HLT
	ICS Comm. Geriatrics
	MOD Ward-Hospice – Pall
	MOD Ward Rehab
<b>Women's &amp; Children's</b>	Children's Ward
	LMH Birth & Assess High
	LMH Birth & Assess Low
	LMH Child Develop Un
	LMH Continence Team
	LMH DOM Midwives
	LMH Family Clins
	LMH Nth Midwife Grp
	LMH Parent Education
	LMH Spec Care Nursery
	LMH Women's Hth Unit
	MOD Ward Paed & Adole
	MOD Women & Paed
<b>Division of Critical Care</b>	LMH -Emergency Department
	MOD – Emergency Department
	Intensive Care Unit (ICU)

## Southern Adelaide Local Health Network

Directorate	Service Area
<b>Rehabilitation, Aged and Palliative Care Services</b>	Kokoda
	Tobruk
	Laurel Hospice
	Myles
	Whittaker
	Ward 5A
	<b>Medicine, Cardiac &amp; Critical Care</b>
	Coronary Care (CCU)
	Dialysis Unit
	Emergency Department
	Intensive Care Unit (ICU)
	Medical Day Unit
	Ward 4A
	Ward 4D
	Ward 6A
	Ward 6DC
	Ward 6DNS
	Ward 6G
<b>Mental Health Services- Inpatient Areas only</b>	Jamie Larcombe Centre
	MH Short Stay Unit (MHSSU)
	NH- Morier Ward
	Ward 4GP
	Ward 5J
	Ward 5K
	Ward 5H
	Ward 18 V
<b>Surgical and Perioperative Services Areas</b>	Ward 4GS
	Ward 6B
	Ward 6C
	Ward 5B
	Ward 5C
	Ward 5D
	Ward 5E
	Ward 5F
	DOSA
	Urology
	Breast Unit
	Preadmission Clinic

	Perioperative Services
<b>Women's and Children's</b>	NNU
	BAS
	4C
	4SMG
	AWHS
	Paediatrics
<b>Corporate Nursing Services</b>	Infection Control
	Hospital At Home
	CNMER
	Transit Lounge
	Outpatient Departments
	Permanent Pool

### Women's and Children's Health Network

Directorate	Service Area
<b>Surgical</b>	Paediatric Outpatients Department
	Operating Theatres
	Kate Hill
	Newland
	Campbell
<b>Medical</b>	Medical Short Stay Ward
	Medical Day Unit
	Adolescent Ward
	Cassia
	Paediatric Intensive Care
	Paediatric Emergency
	Rose
<b>Women's and Babies</b>	Postnatal Ward
	Antenatal Ward
	Birthing services
	Neonatal Intensive Care
	Special Care Baby Unit
	Women's Outpatients Department services
<b>Child &amp; Adolescent Mental Health</b>	Helen Mayo House
	Boylan
<b>Child &amp; Family Health</b>	CaFHS
	Torrans House
	Parent Helpline

### Barossa Hills Fleurieu Local Health Network

Directorate	Service Area
Angaston District Hospital	General nursing clinical areas
Gawler Health Service	General nursing clinical areas
Kangaroo Island Health Service	General nursing clinical areas
Kapunda Hospital	General nursing clinical areas
Mount Barker District Hospital	General nursing clinical areas
Tanunda War Memorial Hospital	General nursing clinical areas
Southcoast District Hospital	General nursing clinical areas
Strathalbyn and District Health Service	General nursing clinical areas
Barossa Hills Fleurieu Community Health Service (BHF)	General nursing clinical areas

### Eyre and Far North Local Health Network

Ceduna District Health Service	General nursing clinical areas
Port Lincoln Health Service	General nursing clinical areas
Eyre and Far North Community Health Service (EFN)	General nursing clinical areas

### Flinders and Upper North Local Health Network

Port Augusta Hospital	General nursing clinical areas
Whyalla Hospital	General nursing clinical areas
Flinders and Upper North Community Health Service (FUN)	General nursing clinical areas

### Limestone Coast Local Health Network

Millicent and Districts Hospital	General nursing clinical areas
Mount Gambier and Districts Hospital	General nursing clinical areas
Naracoorte Health Service	General nursing clinical areas
South East Community Health Service	General nursing clinical areas

### Riverland Mallee Coorong Local Health Network

Directorate	Service Area
Barmera Health Service	General nursing clinical areas
Berri/Riverland General Hospital	General nursing clinical areas
Loxton Hospital	General nursing clinical areas
Murray Bridge Soldiers Memorial Hospital	General nursing clinical areas
Renmark Paringa District Hospital	General nursing clinical areas
Waikerie	General nursing clinical areas
Country Health Connect Berri	General nursing clinical areas
Country Health Connect Barmera	General nursing clinical areas
Riverland Mallee Coorong Community Health Service (RMC)	General nursing clinical areas

### Yorke and Northern Local Health Network

Clare Hospital	General nursing clinical areas
Pt Pirie Hospital	General nursing clinical areas
Walleroo Hospital	General nursing clinical areas