

Retention of National Rail Staff Travel facilities on leaving the rail industry

May 2019



Rail Delivery Group



Rail Staff Travel is part of the Rail Delivery Group

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Introduction and General Summary

The criteria for determining whether an employee retains travel facilities on leaving service with the rail industry are extremely complex, and it is always best to look at individual circumstances rather than rely completely on generalisations.

RST will provide specific information, in complete confidence, to either employees or employers at any time.

In addition, the rules have changed over the years (for instance in October 2006 to comply with age legislation) so if you have already retired, it is highly likely that you were subject to very different Rules at that time. See at the end of this document for some historic references.

This broad overview of the current position (effective May 2019) is designed to help steer employees and employers in the right direction.

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The main things to bear in mind are:

- Only Safeguarded staff retain any travel facilities in retirement
- If any travel eligibility continues beyond active service, it will always be for leisure purposes only.
- For safeguarded staff, it is the circumstances of leaving, rather than length of service, which usually makes the difference.
- The level of facilities held at the point of retirement is what you take with you into retirement. If you have STD class on leaving, you keep STD class thereafter.
- Likewise, if you have reduced your hours to part-time before retiring and receive a reduced number of boxes (occasions of free travel), then that is what you will receive throughout retirement.

Circumstances of leaving – safeguarded staff only

If you retire, you will retain travel facilities for yourself and eligible dependants, provided that on the date of leaving you are eligible to receive an immediate pension from a section of the Railway Pension Scheme or would have been eligible had you been a member of a section of the Railway Pension Scheme. You don't have to take the pension, just be eligible to do so.

(For many employees, the minimum age at which a pension can be taken from a section of the Railway Pension Scheme is 50. However, from 6 April 2010, a change in the pension rules meant that if you transferred voluntarily to your current section of the Railway

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Pension Scheme after 5 April 2006, your minimum pension age may be 55. RPMI will advise you of your minimum pension age.)

[For employers, before advising RST that an employee under 55 has retired and is eligible to receive travel facilities, you **MUST** have confirmed the minimum pension age of the individual concerned and provided documentary evidence of this to RST.]

If you **retire because of ill health**, to retain travel facilities for yourself and your family you must be eligible to receive either a normal age or an immediate ill-health pension from a section of the Railway Pension Scheme on the date of leaving.

If you **leave under redundancy**, then regardless of your pension status you will receive retired leisure travel facilities for yourself and your eligible dependants. If you are dismissed, you will not normally retain any travel facilities.

If you **resign** and leave the industry (i.e. Scheme employment), you will not retain any travel facilities.

If for any reason you **surrender** your right to travel facilities (e.g. in return for a salary enhancement), you will not normally be able to have those facilities reinstated.

If you worked for a company which pays for the issue of travel facilities, then **continued issue in retirement of the facilities to which you may be eligible is additionally subject to your employer having made the requisite final payment to RST.**

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Who deals with my staff travel facilities in retirement?

RST will continue to handle these for you. As soon as RST is notified of your retirement, we amend your status in our records, and will contact you about any details specific to your own circumstances.

Contact details are:

Rail Staff Travel

PO Box 72071

London

EC1P 1JD

Website: raildeliverygroup.com/rst.html

Tel: 0207 841 8274

E-mail: rst@raildeliverygroup.org

Which cards and passes will I keep?

The level and range of travel facilities held at the date of retirement is typically retained, however some cards must be returned immediately for exchange to a retired version.

Staff Travel Cards

You and your family may keep your existing active cards until the next renewal (mid to late March), when you will receive retired versions.

Status Passes (Gold, Silver or Blue)

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We will ask you to exchange your active (green) card for a retired (red) version, for leisure use only.

A new photo must also be supplied, uploaded via our website so that the new card has an up-to-date image – this should avoid difficulties when travelling.

TfL Oyster Status Passes

As above – we will exchange your Active pass for a Retired version, provided you qualify to retain it under TfL's rules, which are different from Rail Staff Travel.

International Reduced Rate Cards (FIP Cards)

The reduced rate travel facilities on FIP administrations for retired staff is not as generous as for active employees.

However you may retain your active card for a period of 6 months following the date of retirement, when it should be sent to RST for us to cancel it and issue you with a retired version.

International Coupon Tickets (FIP Coupons)

The free travel facilities on FIP administrations granted to retired staff is not as generous as for active employees.

After the date of retirement there are two opportunities to receive coupons as if you were an active employee.

- You may apply for any coupons that you did not use in your last active annual allocation of coupons. The start date on the coupons can be any date up to 9 months after your leaving date.
- You may also apply for one additional free coupon on each FIP undertaking. The start date on the coupons can be any date up to 45 months after your leaving date.

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This is also available for eligible dependants, but only on those networks where free travel is granted to spouses/partners and dependent children.

These coupons are valid for the usual 3 months.

Thereafter you can only apply for coupons which retired employees and their dependants are eligible for.

Which cards and passes can't I keep?

You cannot keep any product which allows residential (commuter) travel, as this is only available during active service.

Residential Passes

If you hold a Residential Pass you must return it (to your Personnel department or to RST) on your last day of service.

If you don't do so, your retired leisure travel facilities will be suppressed.

Gold or Silver Status Pass for Residential Use only

As you would already have a Retired Gold/Silver Status Pass for leisure use in order to have this second Status Pass for Residential use, this one must be handed in to your Personnel department or RST on your last day of service.

Privilege Season Ticket

You must return your Privilege Season Ticket to your Personnel department or RST on your last day of service.

If you don't do so, your retired leisure travel facilities will be suppressed.

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You will be able to get a refund for any unused portion (time) left on the ticket.

Reduced Rate Season Ticket

You must return your Reduced Rate Season Ticket to your Personnel department or RST on your last day of service. You will be able to get a refund for any unused portion (time) left on the ticket.

TOC Privilege Card

You must return your TOC Privilege Card to your Personnel department or RST on your last day of service.

Incident Card Team (ICT) Card

You must return your Incident Care Team card to your TOC ICT manager or RST on your last day of service.

What if I'm safeguarded and return to work after retirement or redundancy?

Provided that:

- You return to work for a Scheme employer (one which grants such staff travel facilities under the Scheme); AND
- You have not worked for a NON-Scheme employer in between working for two Scheme employers

then you may be eligible to receive once again active safeguarded travel facilities (normally only for residential purposes as your leisure eligibility will have been "frozen" or "preserved" as described above).

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However, while you might pass the eligibility criteria, the granting of any travel facilities, at any level, is still at the discretion of the new employer.

So before making or accepting a job offer, employers and employees are encouraged to check with RST that the particular circumstances qualify.

Old rules on the retention of staff travel, from 1984 to September 2006 only

Previously, a combination of age and length of service were the main factors.

If you did not meet these criteria at the time, you were not eligible then and so cannot be eligible now:

Retirement

- Age 55 or over with 5 years or more service
- Age 50 or over with 5 years or more service and with the employer's permission
- Executive Grades (as recorded by RST against the employee record) may retire at 50 and retain travel facilities without the employer's permission

Ill-Health Retirement

- Age 45 or over with 5 years or more service
- Under age 45 with 20 years or more service
- Under age 45 with more than 5 years and less than 20 years' service, if you were continuously unemployed since the date of leaving (if you were in receipt of an ill-health pension, the

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minimum service requirement of 5 years is waived) – you must submit evidence of unemployment each year unless you have provided something from an official body confirming that you will never work again. The requirement to provide annual proof ceases when you reach 60 years of age.

Redundancy

- Age 45 or over with 5 years or more service
- Under age 45 with 20 years or more service
- Under age 45 with between 10 and 20 years' service, providing you were continuously unemployed since the date of leaving. You must submit evidence of unemployment each year unless you have provided something from an official body confirming that you will never work again. The requirement to provide annual proof ceases when you reach 60 years of age.

If I don't keep my staff travel, is there any other way I can benefit?

The full range of Railcards is available and some of these might be suitable, depending on your circumstances.

For instance 16-25, Family and Friends, Two Together and Senior Railcards all offer good discounts.

In fact, you can apply for any public railcard as an active member of staff, though you can't of course use two types of concession for the same journey