

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

August 2022



***Rail Delivery Group***



Rail Staff Travel is part of the Rail Delivery Group

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

## Contents

Introduction and General Summary.....	2
Circumstances of leaving – safeguarded staff only .....	3
Who deals with my staff travel facilities in retirement?.....	4
Which cards and passes will I keep? .....	5
Which cards and passes can't I keep?.....	7
What if I'm safeguarded and return to work after retirement or redundancy?.....	8
Old rules on the retention of staff travel, from 1984 to September 2006 only .....	9
If I don't keep my staff travel, is there any other way I can benefit?.....	10

## 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 is designed to help steer employees and employers in the right direction.

The main things to bear in mind are:

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

- Only Safeguarded staff retain any national 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.

## Circumstances of leaving – safeguarded staff only

If you retire, you will retain travel facilities for yourself and your eligible family members, 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 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.]

## **Retention of Rail Staff Travel facilities on leaving the rail industry**

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 (but subject to the paragraph below about the employer final payment) you will receive retired leisure travel facilities for yourself and your eligible family members. If you are dismissed, you will not retain any travel facilities.

If you **resign** and leave the industry (i.e. Scheme employment), you will not retain any travel facilities. However you may be able to become eligible again. Contact RST for more information.

If you are **dismissed** 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 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.**

## **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 available at: [raildeliverygroup.com/rst.html](http://raildeliverygroup.com/rst.html)

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

### 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)***

You must return these to RST as soon as you retire so we can issue a retired version. You can do this by cutting each one into four and emailing a photo to [rst@raildeliverygroup.com](mailto:rst@raildeliverygroup.com)

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.

Your new Status Pass will be valid for leisure travel only.

If you do not do this within one month of leaving, a hold will be placed on your rail staff travel record so no further cards/passes are issued.

#### ***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's rules.

You must return these to RST as soon as you retire so we can issue a retired version. You can do this by cutting it into four and emailing a photo to [rst@raildeliverygroup.com](mailto:rst@raildeliverygroup.com)

## **Retention of Rail Staff Travel facilities on leaving the rail industry**

If you do not do this within one month of leaving, a hold will be placed on your rail staff travel record so no further cards/passes are issued.

### ***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 that was available at the time of your retirement. The start date on the coupons can be any date up to 45 months after your leaving date.

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.

## **Retention of Rail Staff Travel facilities on leaving the rail industry**

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 RST on your last day of service. You can do this by cutting it into four and emailing a photo to [rst@raildeliverygroup.com](mailto:rst@raildeliverygroup.com)

If you don't do so, a hold will be placed on your rail staff travel record so no further cards/passes are issued.

#### ***Gold or Silver Status Pass for Residential Use only***

As you would already have a Retired Gold/Silver Status Pass for leisure use to have this second Status Pass for Residential use, you must return it to RST on your last day of service. You can do this by cutting it into four and emailing a photo to [rst@raildeliverygroup.com](mailto:rst@raildeliverygroup.com)

If you don't do so, a hold will be placed on your rail staff travel record so no further cards/passes are issued.

#### ***Privilege Season Ticket***

You must return your Privilege Season Ticket to RST for a refund using form XX11 available at [www.raildeliverygroup.com/rst/forms.html#other](http://www.raildeliverygroup.com/rst/forms.html#other)

If you don't do so, a hold will be placed on your rail staff travel record so no further cards/passes are issued.

## **Retention of Rail Staff Travel facilities on leaving the rail industry**

### ***Reduced Rate Season Ticket***

You must return your Reduced Rate Season Ticket to RST for a refund using form XX11 available at

[www.raildeliverygroup.com/rst/forms.html#other](http://www.raildeliverygroup.com/rst/forms.html#other)

If you don't do so, a hold will be placed on your rail staff travel record so no further cards/passes are issued.

### ***Rail Staff Leisure Card***

You must return it (and any issued to family members) to RST on your last day of service. You can do this by cutting it into four and emailing a photo to [rst@raildeliverygroup.com](mailto:rst@raildeliverygroup.com)

### ***Incident Card Team (ICT) Card***

You must return your ICT card to your TOC ICT manager or RST on your last day of service. You can do this by cutting it into four and emailing a photo to [rst@raildeliverygroup.com](mailto:rst@raildeliverygroup.com)

### ***Duty Authority to Travel (DAT) Card***

You must return your DAT card to your TOC manager or RST on your last day of service. You can do this by cutting it into four and emailing a photo to [rst@raildeliverygroup.com](mailto:rst@raildeliverygroup.com)

## **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 any other in between working for two Scheme employers



## **Retention of Rail Staff Travel facilities on leaving the rail industry**

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).

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

## **Retention of Rail Staff Travel facilities on leaving the rail industry**

- 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 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.

## **Retention of Rail Staff Travel facilities on leaving the rail industry**

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.