

Liam O'Connor
Operations Manager
Employer HR file

Date: 14 July 2026
Our Reference: RPC/C771C957
Document Type: Checklist

Retirement Process Checklist

1. RETIREMENT PLANNING REVIEW

Owner: HR Team

Priority: High

Due date: 05 February 2026

Evidence required: Notes from 22 January 2026 review meeting

Status: Overdue

Completion notes: Review meeting held on 22 January 2026 focusing on retirement plan progress, supplier handovers, health & safety sign-off responsibilities, and timeline for phased reduction starting 1 April 2026. More information is required to proceed.

Follow-up Action Plan

CHECKLIST DETAILS

Employee
Liam O'Connor

Role
Operations Manager

Case type
Retirement Process

Reference
HRA-C771C957

KEY DATES

Completed
14 July 2026

First review
22 January 2026

Action	Owner	Due Date	Evidence Required	Status
Retirement Process Follow-up is due on 05 February 2026.	HR	22 January 2026	Completion note or supporting evidence	Open
Record a clear owner and review point for the retirement process outcome.	HR	22 January 2026	Completion note or supporting evidence	Open
Review the Retirement Process record for missing facts, evidence, follow-up ownership or review safeguards before completion.	HR	22 January 2026	Completion note or supporting evidence	Open
Review the completed documents for factual accuracy before issue or filing.	HR	22 January 2026	Completion note or supporting evidence	Open
File the final documents in the employee's personnel record.	HR	22 January 2026	Completion note or supporting evidence	Open
Assign an owner for each follow-up action and diarise the next review date.	HR	22 January 2026	Completion note or supporting evidence	Open

Continued

Retirement Process Checklist

2. EMPLOYEE COMMUNICATION AND INTENTION CONFIRMATION

Owner: Line Manager

Priority: Medium

Due date: To be confirmed

Evidence required: Confirmed retirement intention documentation or meeting notes

Status: Pending

Completion notes: Clarify and document the employee's intended retirement date and formal retirement notification. This is currently outstanding and must be established promptly to inform subsequent steps.

3. PENSION AND BENEFITS SIGNPOSTING

Owner: HR Advisor

Priority: Medium

Due date: To be confirmed following retirement intention confirmation

Evidence required: Information provided to employee regarding pension options and benefits

Status: Pending

Completion notes: Prepare and deliver guidance on pension schemes and other relevant benefits to support informed retirement decisions.

Continued

Retirement Process Checklist

4. HANDOVER AND KNOWLEDGE TRANSFER PLAN

Owner: Operations Manager / Line Manager

Priority: High

Due date: Prior to phased reduction starting 1 April 2026

Evidence required: Detailed handover plan including supplier handovers and H&S sign-off responsibilities

Status: In progress

Completion notes: Develop and oversee the completion of handover arrangements and knowledge transfer to ensure operational continuity during and after retirement transition.

5. FOLLOW-UP AND REVIEW SCHEDULING

Owner: HR Team

Priority: High

Due date: 05 February 2026

Evidence required: Scheduled review meeting and agenda

Status: Overdue

Completion notes: Follow-up review for progress assessment and next steps planning is scheduled for 05 February 2026 but is currently overdue. Immediate attention needed to diarise and conduct this review.

Continued

Retirement Process Checklist

6. EVIDENCE REVIEW AND RECORD MAINTENANCE

Owner: HR Team

Priority: Medium

Due date: Prior to finalising retirement process documentation

Evidence required: All relevant documents including retirement notification, meeting notes, and correspondence

Status: Pending

Completion notes: Review all collected evidence manually, including the retirement notice metadata file. Confirm factual accuracy and completeness before filing employee records.