Guidance for Completing Tusla Retirement Forms

1. **HR Form 107 (a)**

Available on the Tusla Hub under HR Forms - Leaving Tusla – Retirement HR Forms (sharepoint.com)

This form is to be completed when you are retiring from Tusla and making application for payment of Pension Benefits. It is to be initiated by the employee. It is important that you complete this form correctly and forward it to your Line Manager.

To fill in the HR107(a) Form, you will need:
- PPS Number
- IBAN Number - Check that your IBAN is correct and readable.
- Copy of your Birth Certificate
- Any documents you may have about pension benefits from previous Irish public service employers (get from your previous employer)

Important things to remember:
- Use block capitals to fill in the form
- Make sure you sign and date pages
- Your pension payment will be delayed if your form is not filled in properly
- Your completed form should be returned at least 3 months before your retirement date

2. **Marital Status**

If you are married, in a civil partnership, widowed, separated, or divorced, you are required to produce a copy of:
- Your civil marriage certificate
- Your civil partnership certificate
- The death certificate of your spouse
- The death certificate of your civil partner
- The judicial separation or decree of divorce and pension adjustment order, if applicable

3. **Section 51 Pension Benefits Declaration**

The purpose of this declaration form is to establish if you have any other public sector pension entitlement aside from the pension and retirement benefits being drawn down from Tusla. Give details of other Irish public or civil service pension entitlements you are applying for. Do not include your Tusla pension.

Under Section 51 of the Public Service Pensions Act 2012, the HSE must be given this information.

You do not need to declare the contributory state pension (formerly known as the old age pension) or widow's pension, if in receipt of either.

We will send back the form if you do not sign and date this form. This will delay your pension benefits payment.

4. Pension Declaration Form (PD1)

This form should be completed in respect of all public or private pension schemes e.g. AVCs etc. One single form should be completed to cover all pension schemes (if applicable).
If you do not have additional pension entitlements, you must still sign and date the bottom section of this page. We will send back the forms if you do not sign and date this section. This will delay your pension benefits payment.

5. Pension Declaration Form (PD1a)

A PD1a form should be completed in respect of any private pension schemes by the respective pension provider. A PD1a form needs to be completed in respect of each scheme, if you have more than one private pension scheme. If you do not have additional pension entitlements, you must still sign and date the bottom section of this page. We will send back the forms if you do not sign and date this section. This will delay your pension benefits payment.

6. Retiring due to Ill Health

Where retirement is on grounds of permanent infirmity appropriate medical evidence at consultant level should be furnished.

Your occupation health department must send in a report recommending you retire on grounds of Permanent Infirmity. You need the report to get your retirement date and pension start date.

Checklist

Before you send in your form, check you have:

- Entered your retirement date on page 1
- Completed your personal details on page 1
- Ticked the reason for your retirement on page 1 of HR107(a) form
- Completed your bank details on page 1 of HR107(a) form
- Completed your marital status on page 2 of HR107(a) form
- Completed your dependant children's details on page 2 of HR107(a) form if this applies
- Completed third party deductions on page 2 of HR107(a) form if this applies.
- Signed the employee declaration on page 3 of HR107(a) form
- Completed Section 51 declaration signed and dated
- Completed PD1 and PD1(a) form signed and dated
- Have copies of certificates required by Pensions Management ready