



OPERATIONS MANUAL

***2017 – 2018 Special Early
Retirement Programme (SERP)***

**Ministry of Finance and the Public
Service**

September 2017

REVISION SHEET

Date	Author	Reason for Modification	Rev. #	Approved by
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2017-Sept-08	Richard Panton	Updated with Pension teams	Rev 0.1	Maria Thompson Walters
2017-Sept-12	Richard Panton	Updated with additional sections and formatting	Rev 0.2	Maria Thompson Walters
2017-Oct-04	Richard Panton	Updated post Pensions Bill	Rev 0.3	Maria Thompson Walters

<p>OPERATIONS MANUAL AUTHORISATION MEMORANDUM</p>

We have carefully assessed the Operations Manual for the Special Early Retirement Programme (SERP). This document has been completed in accordance with the requirements of the SERP Process Development Methodology.

MANAGEMENT CERTIFICATION - Please check () the appropriate statement.

The document is accepted.

The document is accepted, pending the changes noted.

The document is not accepted.

We fully accept the changes as needed improvements and authorise initiation of work to proceed. Based on our authority and judgment, the continued operation of this process is authorised.

NAME
SERP Pensions Branch

DATE

NAME
SERP Steering Committee MOFPS

DATE

NAME
SERP Sponsor Director OPM

DATE

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ABBREVIATIONS

AGD	Accountant General's Department
CEO	Chief Executive Officer
CIO	Chief Information Officer
eCensus E-Census	Employee Census System
ED	Executive Director
eGovJa	eGov Jamaica Limited
ER	Early Retirement
FRD	Financial Regulations Division
GDP	Gross Domestic Product
GG	Governor General
GOJ	Government of Jamaica
HOD	Head of Department
HR	Human Resource
ICT	Information and Communication Technology
IMF	International Monetary Fund
MDA	Ministry, Department and Agency
MOFPS	Ministry of Finance and the Public Service
NIS	National Insurance Scheme
OC	Oversight Committee
OPM	Office of the Prime Minister
OSC	Office of the Services Commissions
PAU	Pensions Administration Unit
PIU	Project Implementation Unit
PS	Permanent Secretary
PSC	Public Service Commission
PSMC	Public Sector Monitoring Committee
PSTIU	Public Sector Transformation Implementation Unit
PSTOC	Public Sector Transformation Oversight Committee
PSTP	Public Sector Transformation Programme
SERP	Special Early Retirement Programme
SHRMD	Strategic Human Resource Management Division
TIU	Transformation Implementation Unit

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PREFACE

1. Objectives

This Operations Manual defines the operational procedures for ongoing cooperation among government teams to facilitate the processing of pension benefits for Government of Jamaica (GOJ) employees who elect to participate in the Special Early Retirement Programme (SERP). These include, but are not limited to:

- **Auditor General’s Department**
- **Ministry of Finance and the Public Service (MOFPS)**
 - *Accountant General’s Department (AGD)*
 - *Financial Regulations Division (FRD)*
 - *Pensions Administration Unit (PAU)*
 - *Project Implementation Unit (PIU)*
 - *Strategic Human Resource Management Division (SHRMD)*
- **All Government Ministries, Departments and Agencies (MDAs) Human Resource (HR) Departments**
- **Office of the Prime Minister (OPM)**
 - *Public Sector Transformation Implementation Unit (PSTIU)*
- **Office of the Services Commissions (OSC)**

The Operations Manual defines mechanisms and procedures for the coordination of activities during the implementation phase of the ER Programme. As the ER Programme continues to evolve its requirements and operational protocols, this Manual will be modified and enhanced to reflect current content within each section as necessary to ensure the Manual is relevant to the ER processing.

2. Rationale for the Operations Manual

An Operations Manual systematically outlines the day-to-day basic operational procedures required for the various functionaries to perform their respective functions. The purpose of an Operations Manual is to help ensure consistent service delivery by officers across the identified government offices.

This will serve as a guide so that all officers must know what should be done and which procedures to follow to complete tasks, avoiding duplication of effort and costly errors.

3. Guiding Principles

The following principles have guided the development of these operational procedures and should be referenced as they are implemented.

- *Promote fairness and transparency across all operations*
- *Ensure efficient and timely processing of transactions*
- *Ensure accuracy and quality of data*
- *All operating activities of the government functionaries in support of SERP are documented and presented on a periodic basis*
- *Ensure roles and responsibilities are clear to each functionary*

4. Reference Materials

The following highlights key reference material which informed this Operations Manual, specifically the changes to pensions processing for public officers occasioned from the amendments to the *Pensions Act* and its subsidiary legislation.

- *Constitution (Amendment) (Established Fund) (Payment of Pensions) Act 2015*
- *Employee Census (eCensus) Data*
- *Pensions (Public Service) Act, and attendant subsidiary legislation, regulations and protocols*
- *Relevant Sections of other Acts which are amended to enact the provisions of the revised Pensions (Public Service) Act as specified in the Third Schedule of the Pensions (Public Service) Act, 2017, including but not limited to the:*
 - *Child Care and Protection Act*
 - *Electoral Commission (Interim) Act*
 - *Electoral Commission (Commissioners) Retiring Benefits Regulations*
 - *Electoral Commission (Director of Elections) Retiring Benefits Regulations*
 - *Employment (Termination and Redundancy Payments) Act*
 - *Judicial Service Regulations*
 - *Judiciary Act*
 - *Police Service Regulations*
 - *Political Ombudsman (Interim) Act*
 - *Public Defender (Interim) Act*
 - *Public Service Regulations*
 - *Retiring Allowances (Legislative Service) Act*
 - *Retiring Allowances (Parish Councillors) Act*

While it is noted that the provisions of the *Pensions (Public Service) Act, 2017* will come into force on or after such date as may be determined by the Minister of Finance and the Public Service by Order published in the *Gazette*, the procedures outlined in this Manual will be executed accordingly in accordance with the Regulations issued pursuant to the amended 2017 Act. Notwithstanding the provisions of these materials, it is expected that the operations will be linked to and supported by the government wide human resource information management system and other central treasury management system.

1. GENERAL INFORMATION

INTRODUCTION

INTRODUCTION

The public sector pension reform undertaken by the Government of Jamaica (GOJ) encompasses the passage of new Pensions Legislation that contemplated several key outcomes including, but not limited to:

1. gradual increase for the retirement age from 60 to 65 years;
2. mandatory contributions of five per cent of their basic salary towards their pension by all pensionable officers;
3. harmonise the legislation governing public-sector pensions in a single statute, while repealing several enactments that previously dealt with pensions;
4. changes to the bases on which pensions are calculated; and
5. provisions for special early retirement by eligible officers over the period **April 2018 to April 2019** in the first instance (or such other period as determined by the Minister of Finance and the Public Service).

In keeping with these outcomes, a Special Early Retirement Programme (SERP) for suitably qualified Central Government Employees within the age range 50 – 59 years is being implemented as a part of the public sector pension reform process¹. The SERP is being managed by the Transformation Implementation Unit on behalf of the Ministry of Finance and the Public Service (MoFPS).

While everything will be done to accommodate persons who apply to the SERP, this must be balanced with making sure that the Public Sector continues to run smoothly and in particular that:

- we do not negatively impact employees
- we do not negatively impact customers
- we retain or attain the required skill-sets enabling us to achieve our vision of becoming a first world country.

It may not be possible to accommodate everyone who indicates an interest in the programme. The decision on the applicant for this programme will rest with the head of the organisation. The Office of the Services Commissions will handle appeals and be the point of resolution for any issues arising. The SERP is designed as far as possible to ensure that the process is fair and takes into account both the needs and preferences of the employee and the needs of the employer to ensure that the organization remains sustainable.

¹ Reference: *Subpart B Special Early Retirement Programme* (Sections 44 – 50) of the *Pensions (Public Service) Act, 2017*. Provisions under this Subpart B are slated to expire on 30 April 2019.

To this end, systems have to be put in place to ensure that the execution of the SERP and any savings resulting are maintained. In order for this to be achieved there is a restriction on the hiring of public officers who separate from the public service via the SERP. To mitigate any risk this may pose to approving persons who have applied; a short course in Strategic Workforce Planning will be provided to the senior HR Directors to enable them to assist the Permanent Secretaries/Heads of Departments/Chief Executive Officers in making the necessary work arrangements to enable an approval. The cost for **any rehire that takes place consequent on the SERP should not exceed 15% of the total savings generated by the SERP.**

I. PROGRAMME OVERVIEW

The public sector pension reforms undertaken by the Government of Jamaica (GOJ) encompasses the passing of new Pensions Legislation that contemplated several key outcomes including, but not limited to:

- *gradual increase for the retirement age from age 60 to 65;*
- *mandatory contributions of five per cent (5%) of their basic salary towards their pension by all pensionable officers;*
- *harmonise the legislation governing public-sector pensions in a single statute, while repealing several enactments that previously dealt with pensions;*
- *changes to the bases on which pensions are calculated; and,*
- *provisions for special early retirement by eligible officers over the period **April 2018 to April 2019** in the first instance (or such other period as determined by the Minister of Finance and the Public Service).*

In keeping with these outcomes, a special early retirement programme for suitably qualified Central Government Employees within the age range 50 – 59 is being implemented as a part of the public sector pension reform process². The SERP is being implemented by the Transformation Implementation Unit on behalf of the Ministry of Finance and the Public Service (MOFPS).

1. Special Early Retirement Programme (SERP)

- The SERP is designed to present the option of early retirement to eligible public officers ages 50 – 59 years now in the Public Service with special incentives.
- SERP operates on a voluntary basis:
 - a) The employee chooses to make a request for consideration to the employer.
 - b) The employer decides, based on the needs of the organisation, whether or not to agree to the employees' request.
 - c) Health professionals, Security forces and Teachers are **not** eligible for this Programme as designed.

2. SERP Package

For those eligible for SERP the following will apply:

- Pensions will be calculated according to the formula specified in “**The Pensions Act 1947**”(amended last 2003) .
- Successful applicants will be able to choose to receive either a Full Pension or a Reduced Pension with Gratuity.

² Reference: *Subpart B Special Early Retirement Programme* (Sections 44 – 50) of the *Pensions (Public Service) Act, 2017*. Provisions under this Subpart B are slated to expire on 30 April 2019.

- Successful applicants will be able to choose to receive an advance on Gratuity.
- Successful applicants will receive two (2) weeks' salary for each year of service **up to a maximum** of one (1) year's salary³
- Successful applicants will be paid in lieu of any vacation leave due.
- Payments for incentive and pay in lieu of vacation leave will be made shortly no later than 4 weeks after separation.

1. Eligibility Criteria

- You are a permanent employee of GOJ;
- You are vested in the GOJ pension plan;
- You are between the ages of 50-59 and eligible to retire early as per "**The Pensions Act 1947**" (amended last 2003);
- You registered your application for SERP using the approved application form and returned your application to your HR Department no later than February 16th 2018.

3. Transition Support Plan

- The GOJ will provide a Transition Support Programme as required. Participants in SERP will have the opportunity to take part in this Programme at their choice.
- This offer cannot be monetised.
- The Transition Support Programme will include counselling, résumé writing, interview techniques, and participation in GOJ Skills Training Programme.

4. Financial Planning Assistance

- Financial Planning and Counselling services will be available up to one (1) month after separation to assist with any financial planning required.
- There will be no cash replacement for the support plan or the Financial Planning Assistance Programme.

II. GOVERNANCE

The Executing Agency will be the OPM and implementation will be carried out by the Strategic Human Resource Management Division (SHRMD), MOFPS principally, with oversight from the Programme Implementation Unit (PIU), MOFPS. Policy direction will come from the MOFPS, and the PIU will report on the progress of the project to the MOFPS SERP Steering Committee.

The SERP Steering Committee is chaired by SHRMD and comprises officers from SHRMD and the MOFPS; the Jamaica Civil Service Association; the Public Sector Transformation Implementation Unit (PSTIU),

³ This subject to the provisions of the attendant Regulations to the Pensions (Public Service) Act, 2017 yet to be issued.

OPM; the Office of the Services Commissions (OSC), and two (2) HR Professionals from the public sector. The Steering Committee has responsibility for:

- i. providing overall guidance in the implementation of the Project;
- ii. identifying challenges and gaps in the implementation; and,
- iii. providing strategic input to ensure the quality and timeliness of the Project.

The Steering Committee will be a decision making body for implementation, providing governance, monitoring, and expert advice on their respective areas of expertise to the Central SERP Team.

See Appendices/[Appendix A](#) for the Terms of Reference for the Oversight Committee.

2. Roles and Responsibilities

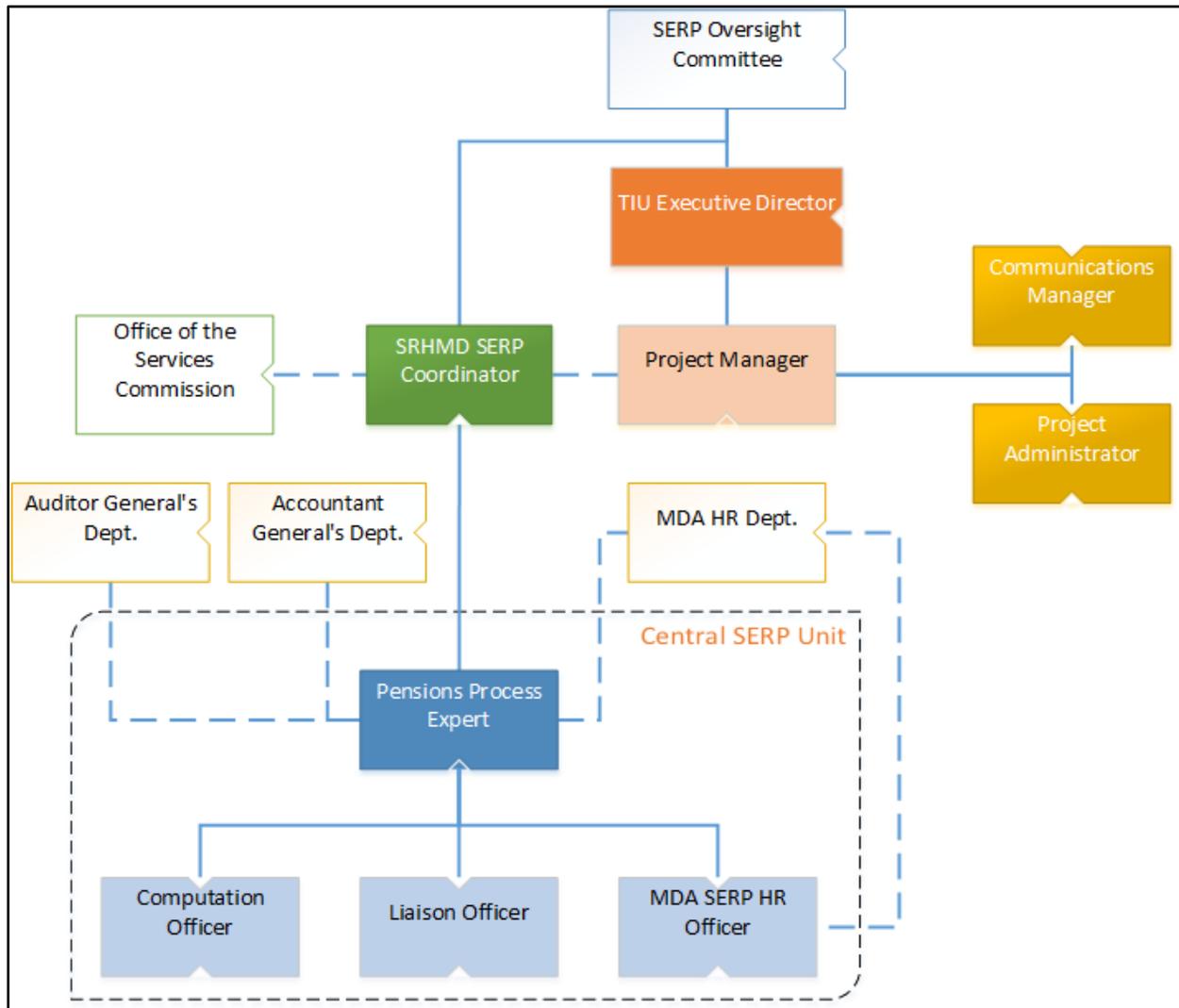


Figure 1 SERP Points of Contact

The following sections define the general roles and responsibilities which are the basis each procedural area addressed below.

1. **SERP Oversight Committee** is a decision making body for the implementation providing governance, monitoring, and expert advice from their relevant areas to the Central SERP Team
2. **TIU Executive Director** is principally responsible for all activities under the Transformation Implementation Unit (TIU) under the Office of the Prime Minister. The ED provides oversight for the Project Execution Unit which is represented by the Project Manager, Project Administrator and Communications Manager.

3. **Project Manager** coordinates and provides supports to the central SERP unit and supports execution of SERP activities. Ensures communications plan is designed and appropriately executed.
4. **Project Administrator** will provide administrative support to the implementation team including the Project Manager.
5. **Communications Manager** will support the development and implementation of a broad communications strategy specifically to promote the ER Programme. This will include but not limited to development of templates, organization of print press and press conferences, forms, information materials and legal texts concerning SERP.
6. **Central SERP Unit** is responsible for the execution of all implementation phases around the SERP programme defined later in this document. Central SERP unit reports to the SHRMD SERP Coordinator and will be setup in the MOFPS Pensions Administration Unit.
7. **SHRMD SERP Coordinator** is responsible for coordinating all implementation activities between the SERP unit and the MOFPS Pensions unit, especially around getting approvals and providing the necessary files and support to enable the successful execution of the SERP.
8. **MDA HR Department** is responsible for managing the retirement activities within the MDA such as confirming eligibility, setting up meetings between applicant and management, providing data to applicant, and arranging separation. To aid in processing these requests, entities with a high number of applicants will be assigned an SERP HR Officer.
9. **MDA HR SERP Officer** is responsible for providing co-ordination and support for the SERP programme within an MDA by executing administrative and support tasks as directed. These officers will assist the HR departments in the MDA's in pulling together the pensions files for submission into the SERP.
10. **Pensions Processing Expert** is responsible for the planning and effective execution of the functions of the Computation team to ensure the efficient and timely processing of the payments under the SERP to public officers.
11. **Computation Officers** is responsible for collating pension files and the processing of retirement benefits to public officers under SERP.
12. **Liaison Officers** is responsible for the coordination of communication between the central SERP unit and the Ministries Departments or Agencies and the resolution of issues arising from the applications for participation in the programme and to generally ensure that the relationship is as beneficial as possible.
13. **Accountant General's Department** is responsible for finalising pension payments.

14. Auditor General's Department is responsible for conducting verification checks on pension files.

15. Office of the Services Commissions is responsible for review of Pension Files as per legislation and any appeals arising from the SERP process.

2. IMPLEMENTATION

IMPLEMENTATION

Implementation will be the responsibility of the MOFPS which is projected to adhere to the agreed Implementation Schedule and conform to the technical specifications for the SERP. As appropriate, resources will be deployed according to the Implementation Plan Requirements. Implementation will incorporate four (4) phases as indicated below.

Phase 1 - Preparation

1. Formal notification of the SERP is sent to all PSs/ CEOs/ HODs. This notification will indicate what the SERP is, who is eligible to participate, and will detail their role and the role of HR.
2. Formal presentation to the Public Sector Monitoring Committee (PSMC) to inform the unions of the programme.
3. HR in the MDA's will compile a list of all eligible persons for the SERP.
4. HR to review service record of all eligible persons for the SERP.
5. An application package is to be sent to the Directors of HR of the participating entities for distribution to all eligible employees. This package includes a memorandum to introduce the programme, an information leaflet and an application form for return to HR.
6. Communiqués sent to each MDA for posting on their Intranet.
7. Requirements to modify the eCensus application to enable tracking of the programme to be sent to eGov Jamaica Limited (eGovJa).
8. Communications Plan designed

Phase 2 – Announcement and Application

The Programme is formally launched and the eligible population will have an opportunity to consider participation.

Activities Timeline

1. **Day 1**, – The Permanent Secretaries will receive notification signed by the Financial Secretary.
2. **2 Days After** – All HR Departments will receive the packages for all eligible employees along with Internal Bulletin to be posted to the MDA's intranet. All eligible persons for the SERP will receive their packages from the HR Units.
3. Formal Launch when the application period starts
4. **1st Week after Launch** – Managers will meet with their eligible population to answer any questions and to ensure that persons understand the offer.
5. **3rd Week after Launch** – Managers will meet with eligible population to answer any questions and to ensure that persons understand the offer.

Phase 3 – Application Review and Feedback

1. All applications will be collected and consolidated by function and area by HR in eCensus.
2. All applications will be processed by the HR team.
Note – Applicant's must meet the eligibility criteria to be included in the processing.
3. HR will solicit the feedback of Managers on applications each Friday for three (3) weeks.
4. HR will meet with the PS/CEO/HOD on the Tuesday afternoon of the following week to take a decision on the applicants thus far.
5. All applicants will receive a personalized written response within 2 weeks of their application
6. Applicants who have been declined participation may appeal to the PS/CEO/HOD by letter within one week of formal notification.
 - a. If applicants are not satisfied, they may appeal the decision of the PS/CEO/HOD by submitting a letter to the OSC.
7. Applicants who have been accepted will receive a response detailing the next steps for separation.

Phase 4 – Separation and Adjustment

1. Employees who have been accepted will separate from the organization on the specified date.
2. All eligible candidates whose requests have been accepted will receive a final letter detailing the payments due and the retirement package details.
3. All retirees will be required to sign the appropriate release documents.
4. During this separation and adjustment period, the support services to be provided are detailed below:-
 - Counselling;
 - Financial Planning;
 - Investment Options;
 - Business Planning.

MDA HR PROCESS

Eligibility Criteria

HR to determine and confirm that persons satisfy the eligibility criteria detailed below:

- You are a permanent employee of the GOJ;
- You are vested in the GOJ pension plan;
- You are between the ages of 50-59 and eligible to retire early as per the rules of the GOJ pension plan;
- You registered your application for SERP using the application form included and returned your application to your HR Department no later than February 16, 2018.

Phase 1 and 2 – Preparation and Application

1. Review and agree mechanics of approval with PS.
2. Review the eligible population with the PS and decide on the implementation of the replacement factor.
3. Ensure that the documentation for PS to meet with Managers takes into account any peculiarities of their organization.
4. Arrange meetings with senior managers and record all questions arising in that meeting along with responses so that we can ensure consistency across the public sector.
5. Provide data on all eligible employees into eCensus so that the application package can be created.
6. Print and arrange the distribution of the application package through HR and Managers.
7. Meet with Managers one week before launch to ensure all persons understand the programme.
8. Report all questions and answers given to central management team.
9. Provide guidance to employees who might prefer to come directly to HR rather than their Manager.

Phase 3 – Application Review and Feedback

1. Arrange for the collection and consolidation of all applications by unit, area, and division. Consolidation of data should be done via eCensus.
 - a. Where eCensus is not available then consolidation should be done in the Excel spreadsheet provided by the central SERP team.
2. Meet with relevant Managers on the Friday of each week during the application period to solicit their feedback any application from their area. A justification must be provided for any application not accepted; this must be recorded by the HR team.
3. Meet with the PS/CEO/HOD the following Tuesday for final decision based on the Managers response. All applications not accepted must include the appropriate justification.

4. If the PS disagrees with Manager, then this should be discussed and resolved. Where there is no resolution then both positions should be sent to the appeal body.
5. The eCensus application is to be updated every week with status of applicants.
6. Applicants who have been declined participation may appeal to the Permanent Secretary/CEO by letter within one week of formal notification.
 - a. If applicants are not satisfied, they may appeal the decision of the PS/CEO/HOD by submitted a letter to the OSC.
7. HR to advise PS of final position of employees who appealed.
8. Applicants who have been accepted will receive a response detailing the next steps for separation.

Phase 4 – Separation and Adjustment

1. All separation letters to be completed based on templates to be provided by the central SERP management team.
2. Employees who have been accepted will separate from the organization on the specified date.
3. All eligible candidates whose requests have been accepted will receive a final letter detailing the payments due and the retirement package details.
4. All successful applicants will be required to sign the appropriate release documents.

Separation Programmes

Central SERP Management will coordinate with MDA HR to execute the following support services during a 2-month timespan to execute the following support services:

- Counselling;
- Financial Planning;
- Investment Options;
- Business Planning.

SERP CENTRAL MANAGEMENT TEAM PROCESS

Early Retirement (ER) Pensions Processing

This programme seeks to make two specific payments to eligible employees within the fiscal year. These are:

- An Incentive Payment;
- Pension advance on gratuity payments to those officers who apply for the benefit and opt for a reduced pension.

Given that the ER will be offered once, special provision will be made to support the different processing points for pensions. As such arrangements will be made for the institutional strengthening and capacity development of key agencies to include:

1. MDA's with high number of potential candidates;
2. The Ministry of Finance and the Public Service's Pensions Administration Unit;
3. The Office of the Services Commissions;
4. The Accountant General's Department (AGD).

Activities include (i) the hiring and deployment of specialized personnel to assist MDAs with the intake process for pensions applications; (ii) the increase in the cadre of staff in the MOFPS to process payments; (iii) the increase in service support within the Office of the Services Commissions; and (iv) the increase in payment personnel in the AGD to effect timely and accurate payments.

The programme supports the legislative and administrative arrangements that are essential to the success of the intervention. This includes, but is not limited to: (i) Introduction of sunset clause in the new pension bill; and (ii) Provisions for the granting of blanket approval for the persons who are in the age range 50 – 59 years.

Through these interventions, the programme will seek to reduce the timeline for processing of payments through a revised pension process based on the diagram below:

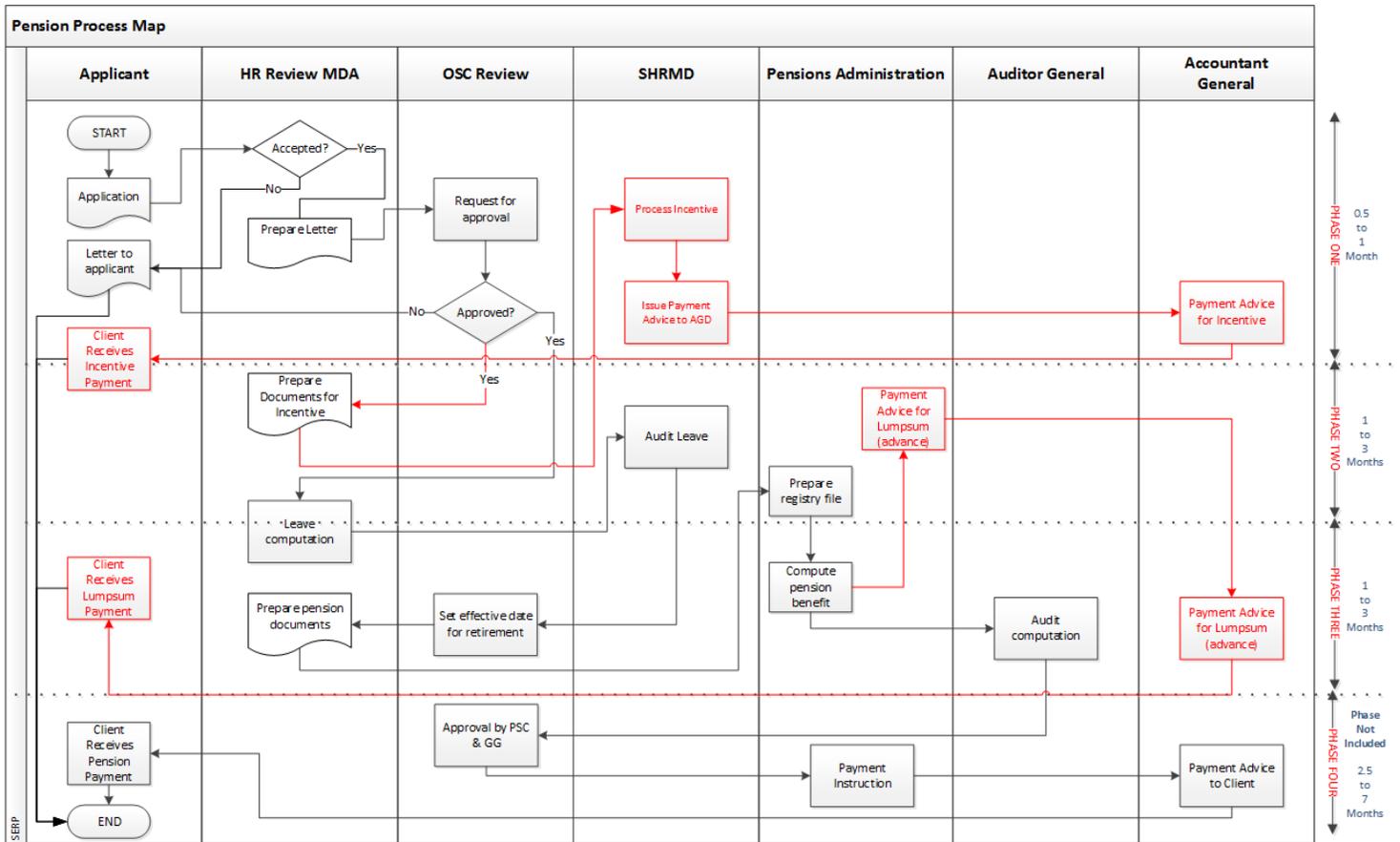


Figure 2 Revised Pensions Process Map

A temporary revision in the pensions processing arrangements to ensure the payment of the new benefit types and the reduction in the processing time for the benefit is to be achieved by the following changes in the phases of the process:

<p>PHASE ONE – Eligibility</p>	<ol style="list-style-type: none"> 1. A supply side approach will be undertaken where notification of ER will be sent to all eligible officers with a specific time frame for response to the application. 2. Through project support MDAs will be able to process all applications within a two weeks’ timeframe and submit an application log to the MOFPS for the initiation of the incentive payment.
<p>PHASE TWO – Preparation of Pensions File</p>	<p>Through the support of the project, MDAs will be provided with additional personnel to ensure the speedy preparation of files for calculations. The officers will be employed in three (3) groups are:</p> <ul style="list-style-type: none"> • Leave calculation support; • Salary and other emolument support; and • Service record support.

PHASE THREE – Calculations	At the point of concluding the incentive and pension calculations by the Pensions Administration Unit (PAU), a submission will be made to the Accountant General for the payment of the incentive and/or advance on gratuity once requested.
PHASE FOUR – Pension Payment	<ol style="list-style-type: none"> 1. Support will be provided to the Accountant General’s Department for the payment of the incentive. 2. Payment of incentives should be paid within the maximum 4 weeks after being determined. 3. Incentive payments will be centralized and made through the AGD. 4. Once incentive and advance on gratuity is calculated, and submitted to the AGD for payment, the steps to finalize the pension calculations will be undertaken.

In order to achieve the objective of fast tracking the payment process, for the incentive and the advance on gratuity, critical capacity building activities in strategic phases of the pension process are supported through the provision of additional human resources within MDAs that have a high number of potential candidates. A SERP Central unit will be setup in MOFPS PAU. This is done at the request of HR Director.

The SERP One Stop Centres will report to the Head of HR within the entity and will support activities detailed below:

- Issuing and collecting applications;
- Promotion of the ER in the entity;
- Collating information for the verification and approval of eligibility;
- Performing administrative functions related to the submission of applications for verification and approval;
- Supporting HR in the preparation of documents for processing incentive and advance on gratuity, for example leave calculations, salary computations, service records compilation, etc.;

The Programme will support the employment of (1) officer in the MDAs that require assistance for up to one (1) year:

The programme will support the establishment of an SERP Central Unit in the MOFPS. The unit is responsible for ensuring that all payment calculations (to include incentive and advance on gratuity payments) meet the appropriate legislative and programme requirements.

This Central Unit is staffed by specialised and highly skilled individuals who will be responsible for accelerating the pace of calculations for finalization of payments by the AGD.

The Unit will be staffed by the following personnel for a period of one year:

- Computation Officers
- Computation Supervisors
- Pensions Filing Officers
- ER Liaison Officers

The Programme also supports the strengthening of the AGD to ensure efficient execution of payments for the incentive and advance on gratuity.