

Annex 3.5.B: Bonus framework form

Note: This form is an approved form for the purposes of Chapter 1 Part 2 section 1.2.5, Forms.

This form is in two parts.

Part A – provides information about the offer and the bonus scheme, and is for you to keep.

Part B – your formal acceptance of the offer and your agreement to serve for an agreed period of between one and three years.

To accept an offer you must also complete Annex 3.5.J, Bonus payment election, to advise how the bonus is to be paid

Part A: Offer and information about the retention bonus scheme

This Part provides information about the retention bonus you have been offered, and is for you to keep.

If you fill in and sign the acceptance form, you are accepting an offer made to you under the retention bonus scheme authorised under Chapter 3 Part 5 Division 2 of *Defence Determination 2016/19, Conditions of service*, made under section 58B of the *Defence Act 1903* ('the Determination').

Offer

The offer made is as follows:

.....[member's name] is hereby offered a bonus by Director General Navy People/ Director General Army People Capability/Director General Personnel – Air Force [delete whichever is irrelevant].

The bonus offered is an amount of \$.....which has been approved by Chief of Navy/Chief of Army/Chief of Air Force [delete whichever is irrelevant].

If the offer is accepted, the member must perform a period of service [period between one and three years] (the 'agreed period of service'), in the following position, employment category or specialisation:

.....

Signed this day by:

Name:.....Rank:.....
Director General Navy People/ Director General Army People Capability /Director General Personnel – Air Force [delete whichever is irrelevant].

Information about the retention bonus scheme

I understand that my acceptance of this retention bonus is subject to the following terms and conditions.

1. I hold a position, employment category or primary qualification for which I have been offered a bonus under this Division.
2. My service in the Permanent Forces is not expected to end before the last day of agreed period of effective service due to reaching retirement age, the end of the period for which I have been given permission to serve beyond my retirement age, or the completion of a fixed period of service.
3. On joining the scheme, I will be paid the amount of retention bonus that was offered to me.

4. If I accept the offer of a retention bonus under this Division, I must serve the period specified in the offer. This period is called my 'agreed period of effective service' and I must serve it in the position, employment category or specialisation for which the bonus was offered to me.
5. If I leave the position, employment category or primary qualification for which the bonus was offered to me by my Service for a reason within my control, I will have to repay the full amount of the bonus.
6. I may not be asked to repay part of the bonus if I do not complete the agreed period of service for a reason beyond my control. Examples are if I am transferred out of the employment category I am in for Service reasons, my service is terminated because of redundancy or for medical reasons, or I die.
7. If I start to serve an undertaking for further service under Part 8 of the *Military Superannuation and Benefits Act 1991* (as preserved by item 4 of Schedule 4 of the *Defence Legislation Amendment Act (No. 1) 2005*) ('an MSBS undertaking') before I finish the retention bonus, I may not finish my agreed period of service for the retention bonus until after I have completed the MSBS undertaking.
8. If I start to serve a return of service (ROSO) or other undertaking for further service after I have accepted the offer of a retention bonus, I will have to complete my agreed period of service after I finish my ROSO or undertaking for further service.
9. I must also elect how the money is to be paid. It may be paid into my bank or superannuation accounts.

See: Annex 3.5.J, Bonus payment election

10. Effective service for the retention bonus is continuous full-time service for which salary is paid. Leave or other events may not be effective service and may reduce my amount of retention bonus. The table in subsection 3.5.10.3 of the Determination shows what counts as effective service.

Note: In the total workforce model, continuous full-time service may be described as service in Service category 6 or 7. A member who is in Service category 3, 4 or 5 who is also on Service option C is also on continuous full-time service. (This note is policy guidance.)

11. If I am already in another bonus scheme under the Determination, I may be paid out of that scheme on a pro rata basis or serve my agreed period of service under this bonus after I complete my service undertaking for the earlier bonus.

Full details of the completion bonus scheme are contained in Chapter 3 Part 5 Division 2 of *Defence Determination 2016/19, Conditions of service*.

This acceptance form, and the related parts of Defence Determination 2016/19, is the whole agreement between the Commonwealth and me about the nature of this scheme. It overrides any other prior understanding or agreement about the scheme. This would include, for instance, things I may have been told about the scheme or things I may have read elsewhere.

Privacy notice

This information is being collected by the Department of Defence.

You may request access to or correction of personal information held about you in relation to this scheme by contacting the Defence Service Centre on 1800 333 362 or emailing dsc@defence.gov.au

If you have concerns about the handling of your personal information, you should raise your concerns with the Defence Service Centre in the first instance, or contact the Defence Privacy Officer at defence.privacy@defence.gov.au.

Defence collects your personal information provided under this form for the primary purpose of assessing eligibility for a retention and completion benefit, and administering it. The Department of Defence may

also use your personal information to conduct investigations or inquiries and to take administrative or disciplinary action relating to the making of false claims for the benefit.

Defence may disclose personal information about you relating to this scheme to ComSuper, the Commonwealth Superannuation Corporation, the Australian Taxation Office and Smartsalary.

Your information is collected under Chapter 3 Part 5 Division 2 of *Defence Determination 2016/19, Conditions of service*. You do not have to provide the information. However, if you do not provide the information, Defence will not be able to see if you are eligible for the benefit, or administer it.

Information disclosed to Smartsalary may be held on Smartsalary servers located in Japan and the United States of America.

Further information is provided in the Defence Privacy Policy, which is available on the internet at www.defence.gov.au/ComplaintResolution/privacy.asp. This contains information on how an individual may apply for access to their personal information and how an individual may apply to have their personal information amended. It also contains information for individuals on how to make a privacy complaint to Defence if they consider Defence may have breached the APPs.

Part B: Acceptance of offer and undertaking to serve an agreed period for a retention bonus

I,
(Rank) (Last name) (Given name)
.....,
(Service number) (Employee ID)

accept the offer to join the retention bonus scheme.

The amount of the bonus offered to me is \$.....

I agree to serve in the Permanent Forces/perform continuous full-time service as a member of the Reserves for:

..... of effective service (*time period of between one and three years*)

in the following position/employment category/specialisation (*delete the descriptors that do not apply*):

.....

I acknowledge that the provisions of Chapter 3 Part 5 Division 2 of *Defence Determination 2016/19, Conditions of service* ('the Determination'), have been brought to my notice.

Note: In the total workforce model, the Permanent Force may be said to comprise members in Service categories 6 and 7. The Reserves may be said to comprise members in Service categories 2, 3, 4 and 5. Reserve members on continuous full-time service are on Service option C. (This note is policy guidance.)

Please tick the boxes that apply below.

I have read and understood Part A of this form.	Yes []	No []
I have sought independent legal advice in relation to this undertaking.	Yes []	No []
I have sought independent financial advice in relation to this undertaking.	Yes []	No []

I have completed the options for payment (see Annex 3.5.J, Bonus payment election.)		Yes []	No []
[]	This is my first acceptance of a place in the scheme.		
[]	I am not currently in receipt of any other retention or completion bonus.		
[]	I elect to be paid out of the following retention or completion bonus on a pro rata basis so as to commence my agreed period of service under this bonus scheme: <i>(List other bonus scheme).....</i>		
[]	I am required to serve under these other bonus schemes before I serve my agreed period of service for this bonus: <i>(List any other bonus schemes).....</i>		

Dated this day of 20

Signed

Printed name

Witness
(This person must be above the applicant in the chain of command)

 Signed

Printed name and rank

I,

.....
 (Rank) (Last name) (Given name) (Employee ID)

verify that the member has met all requirements for payment of the retention bonus.

 Approved
 Administrator authorised for and on behalf of the member's Service