

Ill Health Retirement Process – Guidance for Managers (Non-Teaching)

Action	Additional Info
<p>Discuss the option of pursuing Ill Health Retirement with the employee – normally this is at the point where the employee has indicated that they no longer feel fit to return to any form of work.</p>	<p>In order to be pursue Ill Health Retirement an employee must –</p> <ul style="list-style-type: none"> ❖ Be under normal retirement age ❖ Have 2 years qualifying service ❖ Meet the local government pension scheme (LGPS) criteria for retirement on ill-health grounds
Stage 1	
<p>Referral to Occupational Health (OH) to discuss employee wishing to pursue ill-health retirement.</p>	<p>Has the employee been seen by OH in the last 3 months?</p> <p>A new referral is required where an employee has not been seen in the previous 3 months and/or ill-health retirement has not been previously discussed at an appointment.</p> <p>If there is already a referral open then an email to w/coh@optimahealth.co.uk should be sent asking OH to update the current referral advising the employee wishes to pursue ill-health retirement.</p> <p>For those who have not been seen by OH in the last 3 months, then the new referral can be found under Performance and Attendance Management titled 'OH Advice IHR (OHA)'.</p>
<p>Occupational Health will arrange an appointment with the employee, and may seek consent to gather Further Medical Evidence (FME).</p>	<p>The seeking of FME can cause delays in the process. You should discuss this process regularly with the employee and encourage them to seek updates from their GP/Specialist, on the progress of any FME, OH are looking for (this can help to speed up receipt of the FME).</p>
<p>Once the FME has been received, OH will review this and arrange a further appointment with the employee – following this a report will be produced which will advise on next steps.</p>	<p>Normally OH will advise that all the relevant information has been gathered and a Pensions referral is recommended</p> <p>OH may advise that they do not think the employee should continue to pursue IHR at this stage, if so, you should discuss this with the employee. Where the employee still wishes to pursue IHR the pensions referral should be made as detailed in Stage 2</p>

<p>Stage 2</p>	
<p>The Manager will complete the pension referral and attach the job description, partially completed Ill Health Retirement certificate, as provided by HR, and the ill-health retirement consent form.</p>	<p>This referral will result in an appointment being scheduled with an Independent Registered Medical Practitioner (IRMP) to review the case and decide on whether the criteria for Ill Health Retirement has been satisfied. The employee will not normally attend this appointment, it is a paper review of the medical evidence.</p> <p>There are 3 possible outcomes –</p> <ul style="list-style-type: none"> ❖ Tier 1 ❖ Tier 2 ❖ Not granted <p>A rationale report and pensions certificate will be produced by the IRMP.</p> <p>The relevant referral can be found under Performance and Attendance Management titled Pensions, Local Government Pension New Application.</p>
<p>Once the IRMP report and certificate have been received, HR will consult with the Service Manager/Head of Service, as the First Instance Decision Maker (FIDM), and arrange a Capability Assessment Meeting (CAM), completing any associated paperwork.</p>	<p>Where Ill Health Retirement has been granted (at either Tier 1 or 2) the employee can only access their pension if a decision is made to dismiss on the grounds of capability due to permanent ill-health.</p> <p>The FIDM will require to be satisfied that they have all the relevant information to take an informed decision on dismissal on the grounds of capability due to permanent ill-health. The FIDM should weigh up the IRMP report along with all of the evidence including what is discussed and presented at the CAM and make a decision based on these and applying the “balance of probabilities” test. Where the FIDM has any doubts around the evidence, they will seek to clarify these points or request a further medical report.</p> <p>Refer to the ‘Ill Health Retirement Guidance – Decision Maker’ for further information on the decision making process</p> <p>Where further medical evidence is required, the FIDM would require to complete a referral to OH. The relevant referral can be found under Performance and Attendance Management titled Pensions, Local Government Pension New Application.</p>

	<p>Where Ill Health Retirement is not granted the FIDM will decide on the sustainability of the absence. This is not part of the ill-health retirement benefits process and has different considerations to be taken by the Service Manager/HOS.</p> <p>Were the decision has been taken to dismiss, HR will complete the termination form and Ill Health Retirement certificate, before passing to the FIDM for signature and return.</p>
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