

Ill-health Toolkit for Active Members - Contents

Documents available here:

Cambridgeshire Pension Fund

<http://pensions.cambridgeshire.gov.uk/index.php/employers/looking-after-members/leavers/ill-health-retirement/>

Northamptonshire Pension Fund

<http://pensions.northamptonshire.gov.uk/index.php/employers/looking-after-members/leavers/ill-health-retirement/>

Ill-Health Guidance Note 1 – “Ill-health Pension: Making the Decision for an Active Employee”: Detailed information on ill-health pension and how it fits with your ill-health employment process.

Ill-health Guidance Note 2 – “Processing an Ill-health Pension Case Including Referral to an Independent Doctor”: Detailed instruction on how to send an application for a current employee to the independent doctor and then deal with the returned form.

Letters: Active Member Ill-health - A set of wording for letters and associated forms to be used during the ill-health pension process as detailed in Ill-health Guidance Notes 1 and 2.

- **To send out the IHRC and Legal & General Ill Health Liability Insurance Forms for current employee** - covering letter
- **Ill-health referral required** - Letter and form to check whether employee wants an ill health referral when the OH provider says the individual does not meet criteria.
- **Definite voluntary?** - Letter and form to be used when individual indicates their intention to leave voluntarily even though they have ill-health issues.
- **Meets ill-health criteria** - To be used once there is a signed IHCERTA1 and employer has decided there will be immediate entitlement to ill-health pension.
- **Ill-health declined but 55 or over** - To be used once there is a signed IHCERTA1 and employer has decided there will be no entitlement to ill-health pension and the person is 55 or older
- **Ill-health declined, less than 55** - To be used once there is a signed IHCERTA1 and employer has decided there will be no entitlement to ill-health pension and the person is under age 55
- **Ill-health declined but treatment not yet exhausted and 55 or over** - To be used once there is a signed IHCERTA1 and employer has decided there will be no entitlement to immediate ill-health pension but that hindsight considerations may apply – use only after discussion with LGSS Pensions Service.
- **Ill-health declined but treatment not yet exhausted and less than 55** - To be used once there is a signed IHCERTA1 and employer has decided there will be no entitlement to immediate ill-health pension but that hindsight considerations may apply – use only after discussion with LGSS Pensions Service.
- **Tier 1 or 2 Ill-health Pension Awarded** - To be used to make entitlement award when individual has been awarded ill-health pension. Will need editing depending on tier.

- **Tier 3 Ill-health Pension Awarded** - To be used to make entitlement award when individual has been awarded ill-health pension.
- **No Ill-health pension and 55 or older** - To be used to make entitlement award when individual age 55+ is dismissed without ill-health pension.
- **No Ill-health pension and less than 55** - To be used to make entitlement award when individual under age 55 is dismissed without ill-health pension.
- **No Ill-health pension and less than 55 but treatment not yet exhausted** - To be used to make entitlement award when individual under age 55 is dismissed without ill-health pension but where there is a clear chance that their treatment may not actually succeed – discuss with LGSS Pensions Service before sending.
- **No Ill-health pension and 55 or older but treatment not yet exhausted** - To be used to make entitlement award when individual age 55+ is dismissed without ill-health pension but where there is a clear chance that their treatment may not actually succeed – discuss with LGSS Pensions Service before sending.

Form: IHRC - The member consent form that, once completed, allows sharing of medical details with the Independent Doctor.

Legal & General Ill-Health liability Insurance Form – The form that registers a potential claim against the policy covering the capital strain costs that would otherwise fall to be paid by employers in cases where an ill health pension is awarded.

Leaflet: for Active Member: A leaflet titled “Understanding Your Referral to an Independent Doctor” to be issued with the IHRC and Legal & General Ill Health Liability Insurance forms.

IHCERTA1 Ill-health certificate – for currently active members;

Flowchart: Ill-health Referral - A flow chart for the whole ill-health referral process.

Form: IHRE1 - The form for referral of an active or deferred member to the IRMP.

Flowchart: Which Form? - A flowchart to help decide which option to choose on the IHRE1 and which ill-health certificate to attach.

Flowchart: IHCERTA1 Decision Guider - A flow chart to help with the decision making process once the IHCERTA1 is received.

Checklist: for Practitioners who manage current employee ill-health - A checklist to provide reassurance for the person managing the ill-health case that everything that is needed has been dealt with.