

Is there any other documentation that I need to provide for IHR application?

You will be asked to provide additional documentation with your application. This will be information like marriage/birth certificates, and documentation required will be detailed on the AW8 application form.

Do I have to wait until my Stage 3 IHT panel is completed before I complete the AW8 form?

No, you can complete your section of the application and send this to your HR representative before the Stage 3 panel takes place.

What if I am already of retirement age, do I still need to complete an AW8 form?

No, if you are already of retirement age as set out in the 2015 Pension Scheme, you would complete a standard pension application form and send this to Payroll. There is no need to send the form to HR Medical and Dental.

CONTACT DETAILS:

SPPA

Website: <https://pensions.gov.scot/>

Email: sppacontactus@gov.scot

Phone: **01896 893000**

Address: Scottish Public Pensions Agency
7 Tweedside Park, Tweedbank,
Galashiels TD1 3TE

NHSL Payroll

Email: epayroll.lanarkshire@lanarkshire.scot.nhs.uk

Phone: **01698 752975**

Address: Payroll Department
Kirklands Hospital, Fallside Road,
Bothwell G71 8BB

If you have any questions which have not been covered, please contact the HR representative who has been dealing with your case.

HR Rep:

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Contact Number:

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Email:

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Employee guide to Ill Health Retirement

RETIREMENT AND SPPA

In cases where the employee is a member of the NHS pension scheme, they may be eligible to apply for retirement on the grounds of ill-health and access their pension. This is a separate process from ill health termination, and it is the employee's responsibility to apply for ill-health retirement pension benefits. This will usually follow a discussion with Salus Occupational Health.

The decision to terminate employment is not linked or subject to ill-health retirement (IHR). The decision to support retirement on ill health grounds lies with the Scottish Public Pensions Agency (SPPA) and not NHS Lanarkshire. More details around this can be found online at

<https://pensions.gov.scot/nhs/retiring-nhs/ill-health-retirement>

The ending of employment will not be delayed in order for a pension application to be made and processed. It is therefore important that employees should not delay making a pension application once appropriate medical advice has been received and/or the decision to terminate employment is made.

Applications for Ill health retirement can be found at

<https://pensions.gov.scot/nhs/nhs-forms>

FAQS ILL HEALTH RETIREMENT PROCESS (IHR)

What forms need to be completed to apply for IHR?

There are two forms: AW8 and AW8(Med). You should complete the employee section of the AW8 form. You will then send this to the HR representative who has been assisting your case. This can go to their email, or can be posted/handed in to:

Kirklands HQ, Fallside Road, Bothwell, G71 8BB

Once your HR representative has received the form, they will check it is completed correctly and complete the HR section before sending on to payroll. Payroll complete their section and then forward on to the SPPA for consideration.

Who will support my application for IHR?

Your Occupational Health Clinician, GP or Consultant can complete the AW8(Med Form). The form will be submitted to SPPA with any supporting medical evidence/reports. If it has been agreed that the Occupational Health Clinician who has been reviewing you will complete the form, the HR Representative will inform Occupational Health you wish to apply for IHR and request they liaise with you around completing the form. The assessment of the Occupational Health Clinician is only their view, and the ultimate decision on the award of IHR lies with the SPPA Medical Advisors.

If my request for ill health retirement benefits is not successful can I appeal?

Yes, you can appeal this decision with the SPPA. If you are a member of a union, they can also help you with this process.

Is there an age limit for ill health retirement benefits?

From April 2022, all staff were moved on to the 2015 Scheme. If you are a member, your last day of Scheme membership must be before your State Pension Age (SPA) or age 65 if your SPA is before age 65. This is because ill health retirement benefit provisions are limited to those members who have not reached their normal pension age.

What is the timescale for having my application approved?

This can vary from case to case, but delays can be caused if SPPA don't have all the information required. This can be information like medical submissions required for AW8 (Med) completion. It is your responsibility to follow this up. Any requests for updates on your application should be sent directly to SPPA. If there has been no confirmation from SPPA within 3 months of application, you should request an update from them.