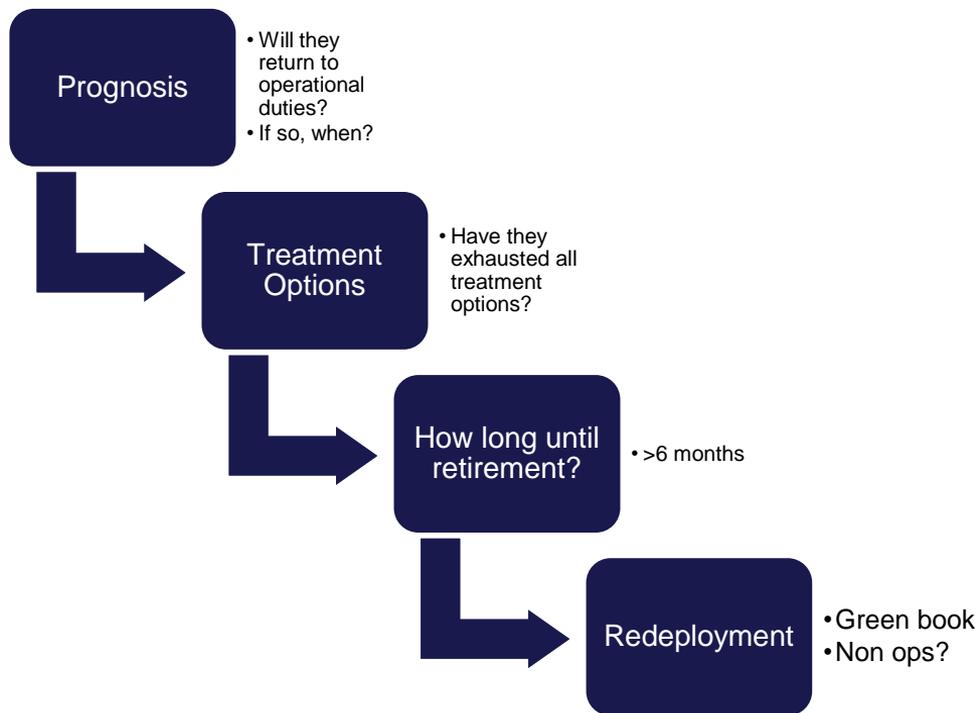


III Health Retirement Process

Claire Johnson, Pensions Officer

Considerations



WYFRS' Approach



Employee awareness

OHU

Evidence gathering

Review

Referral

Outcome

Appeal



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Meet with Employee

Pensions Officer meets with employee and trade union rep (where applicable) and discuss the following:

- IOD?
- Regulations
- Process
- Timescales
- Appeals

* Provide outcome letter from meeting documenting discussion.



Over to OHU

OHU arrange an appointment with AMA for the following:

- Update on medical condition
- Capability assessment
- Consent to apply for GP and consultant records (where applicable)

Evidence Gathering

Once consent has been granted OHU will then gather the necessary evidence. We'd expect the following to be included:

- OHU records
- GP records
- Consultant reports (where applicable)
- Accident reports (if IOD)
- Supplementary evidence from employee i.e. pain diary



Review

Once all of the evidence has been gathered the AMA and Senior Nurse will meet to ensure there are no gaps.

OHU will invite the employee and/or trade union to:

- Look through the evidence
- Check that the medical condition hasn't changed
- Submit additional evidence (if applicable)
- Consent for management to see IQMP outcome report



Referral

A detailed covering report is generated for the IQMP making reference to:

- Reason for referral (ill health and/or IOD)
- Scheme specific regulations
- Job description
- What evidence is included i.e. OHU notes, capability assessment, GP reports etc.

* Include correct scheme [certificate](#)



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Outcome

- The IQMP ordinarily provides an opinion within 2-4 weeks. We'd expect them to complete the certificate and provide a management report* detailing their thought process and opinion.
- In some circumstances they may refrain from making a decision, this is usually down to lack of evidence.
- Although the IQMP decision is binding, it's important that it's not simply rubber stamped.



Outcome Cont...

- A panel consisting of the PO, CHRM and OH&SM meet to discuss the outcome, scrutinise the evidence and prepare questions to go back to the IQMP with (where applicable)
- Once the panel is satisfied with the IQMPs opinion the PO would meet with the employee to advise of the outcome and provide decision letter.



Outcome Cont...

- If they are ill health retired they are served notice, reminded of the review process and retired to pension.
- If they are not ill health retired they are referred back to HR for possible redeployment or capability dismissal.



Appeal Process

Routes of appeal are as follows:

- Appeals against decisions based on medical advice - Informal referral back to IQMP (new evidence permitting) – **28 days (from date of outcome letter)** – this is a statutory deadline as per the pension regulations*
- Appeals against decisions based on medical advice – H2 appeal to Board of Medical Referees – **28 days (from date of outcome letter)** – this is a statutory deadline as per the pension regulations**
- Appeals on other issues – IDRP – **6 months** (from date of my letter) – this is a statutory deadline as per the pension regulations

*If the individual chooses the informal referral back to IQMP option it's been agreed that they will have a further **28 days** to gather the 'new' evidence – This deadline can be extended at the discretion of Occupational Health and Safety Manager. Each case will be considered on a case by case basis and extension only granted in exceptional circumstances

** If the individual chooses the H2 route they have up to 28 days before the appeal is heard to submit their evidence. With consent of the individual, the Occupational Health and Safety Manager and AMA would like the opportunity to review this evidence, if the AMA deems it materially significant the Occupational Health and Services Manager has the option to refer it back to the original IQMP for them to reconsider – This is at the discretion of the Occupational Health and Services Manager, if it is decided to not refer back to the original IQMP the appellant can still submit this to the BMR as part of their evidence



Questions?



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