

Teachers and associated professionals who are members of SPPA

Applying for Ill health retirement

Introduction

Where an employee is a member of the teachers' pension scheme (SPPA) and is unable to continue in work due to ill health until Normal Pension Age (NPA)* and has at least two years qualifying service, they can apply to retire early on the grounds of ill health.

Prior to any application for ill health retirement, alternatives to ill health retirement, such as redeployment should have been considered.

Applying for ill health retirement

It is the member's decision and responsibility to apply for ill health retirement. Normally this will be through the attendance management process in discussion with line manager and HR. This should be done within agreed timescales otherwise it may result in the capability procedure being instigated in the interim period. Whilst Aberdeenshire Council will support this process, final responsibility for the application lies with the teacher applying for ill health retirement.

To apply for ill health retirement, the following 2 forms require to be completed

STSS (MED) form – this requires to be completed by a medical professional (OH Assist will complete this for referrals made via them). It is important that as much information as possible is included.

STSS (INC) form – Part A to be completed by the employee. Part B to be completed by HR/Payroll.

When considering whether ill health retirement is viable, a referral should be made to OH. In order to determine whether ill health retirement is an option, OH will normally

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human resources and organisational development

FACT SHEET

require further medical evidence (FME) from the teacher's GP and consultant, where applicable. OH will consider all medical notes then confirm their recommendation in an outcome report to the line manager and teacher. OH will also complete the MED1 form and send it to the teacher.

The final determination on whether the ill health criteria is met lies solely with the SPPA.

To gain access to the FME to support their application for ill health retirement the teacher must write to OH to request their records to be released, which the teacher can then send on to the SPPA.

Members can also apply directly to SPPA without OH support if they choose to. If applying via this route, members will need to arrange for the STSS (MED) form to be completed by a medical professional eg GP or Consultant.

The 'Applying for ill health retirement – Teachers flowchart shows the processes to follow when applying for ill health retirement.

Levels of benefit

Once the teachers' (or associated professionals') case has been considered both they and the Council will receive an outcome from the SPPA which will include either:

- Partial Incapacity Benefit - Your teacher is not capable of teaching but can undertake other employment before their normal pension age (60 or 65 depending on when joined scheme) OR
- Total Incapacity Benefit – Your teacher meets the criteria for Partial Incapacity Benefit and their ability to carry out any work is impaired by more than 90% and is likely to be permanently so. Permanency is considered on the balance of probabilities.

Should any teacher or associated professional have any queries in relation to the Tier they have been granted and the level of benefits they will receive they must direct queries to the SPPA Tel: 01896 893000 quoting their GTC number.

Effective Date of retirement if granted

There has been a bit of confusion recently re SPPA backdating payments for teachers applying for Ill health retirement.

It has been confirmed by SPPA that they will only backdate the payments to the date when the application form was received unless the proposed date of retirement (i.e. when employee goes on half pay or no pay) is after the date that the forms were received.

For example, if employee goes on no pay on 1st July and SPPA receives the application form on 5th August, they will only backdate the payment to 5th August rather than 1st July as it used to be in the past.

Please ensure that this is clearly communicated to all teachers currently applying for ill health retirement.

What if ill health retirement is not granted or there is no decision made within 8 weeks of initial discussion regarding application?

If the teacher does not meet the criteria for ill health retiral they must inform their line manager who will refer back to your allocated HR Officer.

Where ill health retirement is not granted and the prognosis is long term, then dismissal on the grounds of capability will be considered in line with Aberdeenshire Council's Attendance Management Procedure for Teachers and Associated Professionals.

Should a teacher wish to appeal they can do so directly with the SPPA.

Ill health Retiral and barring

Ill-Health benefits cannot be awarded to a teacher who has been barred for misconduct or who is under investigation with a view to barring. Where a teacher under investigation is not subsequently barred, and an application for Ill-Health

HR & OD POLICIES

human resources and organisational development

FACT SHEET

benefits is accepted, the benefits will be backdated. Section 9 and Section 16 of the Inc Form are particularly relevant.

Further information is available from SPPA:

[SPPA ill health retirement Factsheet](#)

[Guide to Ill health retirement](#)

[STSS1 Form](#)

[MED 1 form](#)

