



From mountain to sea

Ill Health Retiral Guide - SPPA

How to...

1. Identify an ill health retirement (IHR)
2. Apply for ill health retirement
3. Implementing ill health retirement

1. Identifying a potential IHR

Is the teacher or associated professional a member of the teachers' pension scheme? If unsure, they are a member of the scheme than either the employee or HR would be able to confirm this.

If the teacher/ associate professional is a member, they may decide to apply for IHR in situations where they may become permanently unfit for work, and/or it becomes likely that finding another post in the future may be difficult due to their health.

If there are concerns relating to the teacher's/associated professional's fitness to return to work, then IHR could be an option considered. The option to apply for IHR should be discussed to allow them to decide as to whether they wish to apply or not. The decision to apply for IHR is a decision to be made solely by the teacher/associated professional.

Likewise, the teacher/associated professional may advise that they are considering leaving their post due to health concerns. You must contact the allocated HR Advisor to discuss this at the earliest opportunity. Should you not have an allocated HR Advisor, please contact [askHR](#) portal or call 01467 534400.

Occupational health may be consulted to provide their opinion in relation to the teacher's fitness for work or:

Alternatively, the teacher/associated professional may apply for IHR directly to the SPPA and request the relevant medical information directly from their GP. In this instance a referral to OH is not required. However, it is advised that the employee



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still informs their Head Teacher of their intention to apply for Ill Health Retirement and keeps them up to date of their progress. In turn the Head Teacher should contact the HR Advisor to ensure any advice required can be sought on the process.

If the teacher is attending an occupational health appointment to determine whether they are eligible for IHR, occupational health will request medical reports from the teacher's GP and any medical specialists that may be treating them.

2. Applying for ill health retirement

The teacher/associated professional must complete a STSS (MED) form which should be submitted to occupational health so that they can complete the sections requiring medical information and enclose any supporting medical information. They also need to complete Section 1 of STSS (INC) form, payroll requires to complete Section 2 of this form.

Alternatively, the teacher/associated professional may complete a STSS (MED) form and take it directly to their GP, in this instance they do not have to attend for an occupational health appointment. An employee applying in this way will still be required to complete Section 1 of STSS (INC) form and request payroll to complete Section 2.

It can take some time for the medical information to be received from GP's and Specialists. Should Occupational Health's requests remain unacknowledged they will re-issue their requests to try and get the information as soon as possible.

Once all paperwork has been completed by the relevant parties, it should be sent by the allocated HR Advisor, or by the teacher if applying directly, to the SPPA for their decision.

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

Once the teacher/associated professional's case has been considered the council will receive an outcome from the SPPA which will include either:

- Partial Incapacity Benefit - The teacher/professional 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 – The teacher/professional meets the criteria for Partial Incapacity Benefit and their ability to carry out any work is impaired



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by more than 90% and is likely to be permanently so. Permanency is considered on the balance of probabilities OR

- The teacher/associated professional does not meet the criteria for ill health retiral (if this is the case please refer to the capability section within the attendance procedure, your allocated HR Advisor can also provide appropriate advice).

Should the teacher/associated professional have any queries in relation to the Tier they have been granted and the level of benefits they will receive, this must be SPPA directly quoting the GTC number.

3. Implementing Ill Health Retirement

If the teacher/associated professional has been granted IHR you must discuss this with them at the earliest opportunity. You will require to agree the termination date (an indicative date has already been given in the application paperwork and usually you are just confirming that this is an appropriate date). HR can provide advice and guidance if required.

Please note that SPPA will only backdate payments to the date the application form is received unless the proposed date of retirement 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 from on 5th August, they will only backdate the payment to the 5th August rather than 1st July as has previously been applied

Once a termination date has been agreed the employee must notify the SPPA in writing and the line manager completes the online employee change form via [askHR](#).