

Civil Service Pension Scheme

Notes for the employer

Application for an ill health retirement assessment (IHR)

The IHR form is an application for an ill health retirement assessment to be carried out by the Civil Service Pension Scheme Medical Adviser, whose role is to provide a medical assessment of whether or not the scheme ill health retirement criteria are met in order for member to access scheme ill health retirement benefits.

General Information

You should consult the '*Ill Health Retirement – Procedural Guidance for Employers*' for advice on the procedures to follow when dealing with ill health retirement. The guidance gives more information about how to apply for an ill health retirement assessment and what supporting documentation is needed. It also gives further details of the type of information the Scheme Medical Adviser will be seeking (see Appendix F of the '*Ill Health Retirement – Procedural Guidance for Employers*'). This guidance is available on the website, www.civilservicepensionscheme.org.uk under 'Employers' – 'Scheme Medical Adviser'.

The IHR form

The IHR form is in two parts. P1 is for the member to complete and sign (as relevant) and P2 is for you to fill in.

IHR1 & 2 Notes for the employer

IHR – P1 in more detail

This is the part the member completes and signs (as relevant)

Member's details – asks the member to confirm their name, contact and other personal details – to verify that those held on your records are accurate and up-to-date and also in case the form should become detached.

It also asks the member to explain in their own words what impact their medical condition has on their ability to do their usual job or any other work.

Members are also asked to consent to the employer's occupational health provider seeing the referral in order to provide occupational health records or any Medical in Confidence material relevant to their case to the Scheme Medical Adviser.

Medical Consent Form 1 – contains medical consent forms for the member to complete and sign to give permission for the Scheme Medical Adviser to approach their doctor or specialist to obtain further information about their medical condition. The Scheme Medical Adviser will not be able to complete an assessment if they are not able to review appropriate medical evidence supporting the member's application.

Medical Consent Form 2 – asks the member to confirm whether or not they consent to the Scheme Medical Adviser providing a report and also whether they wish to see a copy of the outcome report of their medical assessment from the Scheme Medical Adviser, for the purposes of correcting any factual errors, before the report is sent to you. The notes and the advice on the form also make it clear what the consequences of withdrawing permission to release the report to you may have on the ill health retirement process.

Medical Information Consent Forms (A, B and C) – are for the member to complete to give permission for their doctor or specialist (or both) to provide relevant information about their condition to the Scheme Medical Adviser. Completion of a **Medical Information Consent Form** (lettered 'a', 'b' and 'c'), is required for **each** medical practitioner the member would be prepared for the Scheme Medical Adviser to contact.

Optional Form and Notes - for the member's doctor or specialist – provides details of the kind of information the member's doctor or specialist would need to give about their condition if they decided to obtain a report from them themselves to support their application for an ill health retirement assessment.

Please note: Any current medical evidence (i.e. typically no more than three months old), the member can provide to support their application, such as a report from their doctor or specialist, may enable the Scheme Medical Adviser to complete their assessment more quickly.

IHR1 & 2 Notes for the employer

IHR – P2 in more detail

This is the part you complete and sign. It asks for confirmation of relevant employer and member details (as you have on record) to enable the Scheme Medical Adviser to process the application, as well as invoicing information so that appropriate fees can be charged for services provided under the contract. A copy of the current price list for the Scheme Medical Adviser medical advice services may be obtained from MyCSP.

It also asks for confirmation of which scheme the member is in (or when they joined the scheme for IHR2 – **partnership** only) and it is important that you provide this information correctly as it tells the Scheme Medical Adviser which scheme criteria the ill health retirement application will need to be assessed against.

There is also a requirement to check that the member meets other qualifying conditions for IHR such as length of service and age before an application is made. The table in **Appendix B** of the '*Ill Health Retirement – Procedural Guidance for Employers*' gives a breakdown of qualifying service and eligibility conditions that a member of a particular scheme would need to meet to be considered for IHR. This guidance is available on the website, www.civilservicepensionscheme.org.uk under 'Employers' – 'Scheme Medical Adviser'. The guidance also provides more information about actions that should be taken where an individual is terminally ill or where a retrospective application for ill health retirement may be required.

The form also asks you to give occupational information relevant to the member's application:

- Details of consideration given to job modifications and redeployment (if redeployment has not been considered your employer should do this before submitting an application for ill health retirement);
- Full job description – this should include any information about the level of responsibility in the job (i.e. management level or seniority in hierarchy) and the type of work and activities involved in the job;
- Sickness absences during last five years;
- Occupational Health Records as covered in part 3 of the form – see the notes for part 3 below for more information about this;
- Copies of any scheme medical adviser correspondence relating to member's case, if applicable;
- Additional medical evidence that may have been submitted by the member, if applicable

IHR1 & 2 Notes for the employer

Notes for your Occupational Health Provider – if required

There are notes at the end of the form that you can give to your Occupational Health Provider (OHP), if required. These explain what role the OHP plays in the sickness absence management process and what information the Scheme Medical Adviser will be seeking from them.

Liaison with your Occupational Health Adviser (OHP)

Your Occupational Health Provider should already have been involved in the process of managing the sick absence of a member of staff before an ill health retirement application is made as, before considering ill-health retirement, you should have investigated ways of helping the individual return to, or stay in, employment (See para.2 of the '*Ill Health Retirement – Procedural Guidance for Employers*').

Information from your OHP is an important element in referring a high quality and complete case and should include:

- reports to management about the member's occupational health assessment and dates of any occupational health consultations;
- the clinical notes (including notes of any consultations) upon which such reports to management are based and;
- any reports from your doctor or specialist that the OHP has obtained.

Any information from your OHP for a paper-based referral should be provided and should remain in a sealed envelope marked 'Medical in Confidence' that can only be opened by a medical professional such as the Scheme Medical Adviser with the member's permission (as required in 'The Medical Consent Form 1' in P1). Your OHP will alternatively include the MIC electronically if you are referring a case using the HML Online portal. Please refer to HML's online user guide. It is important that the information provided is legible and so electronic completion or typed supplementary reports are preferable. Statements must be supported by first hand evidence from examining practitioners and/or objective testing. Extracts from clinical notes or reports are not acceptable and complete documents must be submitted.

Notes about completing and submitting the IHR1 form

- You can separate out P1 for the Scheme Member to complete and the notes for your Occupational Health Provider to refer to, if you like. You must tell them of any deadlines and where to return the form. You should also tell the member about the '*Ill Health Retirement – Guide for Members*' and that they should refer to it when completing P1 of the IHR form. The guide is available to download from the member section on the Civil Service Pensions website: www.civilservicepensionscheme.org.uk
- It is vital to ensure that when you send the application form to the Scheme Medical Adviser it is complete, contains as much relevant information as possible and includes all the relevant paperwork.

IHR1 & 2 Notes for the employer

- You must make sure that both parts of the IHR form and reports provided separately by your Occupational Health Provider are sent to the Scheme Medical Adviser at the same time, whether or not the latter is being provided on paper or through HML Online portal.
- If the order form is not complete or required documents are missing and cannot be easily and quickly obtained, it will be returned and a fee charged. This may also result in a delay in the Scheme Medical adviser making a recommendation.
- If you need advice about what to send, please contact the Scheme Medical Adviser helpdesk. Contact details for the Scheme Medical Adviser are given at the end of part 2 of the IHR form.
- There are further details of the type of information the Scheme Medical Adviser will be seeking in Appendix F of the '*Ill Health Retirement – Procedural Guidance for Employers*'. This guidance is available on the website, www.civilservicepensionscheme.org.uk

Field Code Changed