sppa
SCOTTISH PUBLIC PENSIONS AGENCY

Scottish Teachers' Superannuation Scheme   **Circular 7/2008**

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Principals of Further and Higher Education Institutions
Independent Schools

Your ref:
Our ref: STSS Circular 7/2008

Official Correspondents of Other Participating Organisations

25 September 2008

Dear Sirs

TEACHERS' SUPERANNUATION (SCOTLAND) REGULATIONS 2005 (as amended)

APPLICATIONS FOR ILL HEALTH RETIREMENT RECEIVED FROM 1 OCTOBER 2008

I refer to previous circulars in which I advised about changes to the way ill-health retirement applications will be processed and that the recommendation from the Medical Advisers (MA's) will be solely on the basis of the evidence provided.

The purpose of this circular is to notify employers of what you can do to assist in providing quality medical evidence in support of ill-health retirement applications for your employees and of changes to the ill-health retirement applications which will assist the MA in assessing these desk based applications.

Employers are asked to note that there will be a new ill-health retirement application available on our website from 1 October 2008. We realise that you may already have requests for ill-health retirement currently in the process and these will be accepted, however, SPPA will not accept applications on the old style forms after 3 November 2008. For old style forms received on or after 1 October 2008 (but by 2 November 2008), SPPA staff will check these applications and seek further information from the employer or member as necessary.

Changes to the application for the employer to complete are noted below. The application will not be processed and sent to the MA unless the following is included:-

- full details of sickness absences and the reason for those absences and
- details of the job being undertaken or a full job description and
- the job classification role and
- details of what considerations have been given to re-deployment or rehabilitation.

As ill-health retirement should be a last resort after all other options have been considered, by including the above in the applications will ensure that employers are fulfilling their obligations to their employees before submitting an ill health application.

It is in the interests of all parties to ensure that applications are completed as fully as possible to reduce any delays.

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Because greater emphasis will be placed on the member and/or employer to ensure that any medical evidence clearly justifies ill-health retirement, all medical information available in support of the application should be submitted. Where a condition is severe enough to warrant ill-health retirement, it would be expected that the member will have sought the benefit of a specialist during their illness and this should be included with the application. If there are no specialist reports they must supply medical evidence from their GP and Occupational Health Adviser.
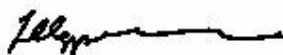
Other factors to be taken into consideration must be that the member's incapacity is considered to be permanent until normal pension age and they have received appropriate medical treatment.

SPPA staff have been invited to attend the Occupational Health Doctors seminar 3 October where they will give a presentation on the above changes. Also in attendance will be the MA's who will advise on what should be provided by those medics supporting the member's application. The guidance will be available on the internet when this has been approved.

Please also note that a revised Internal Dispute Resolution Procedures booklet will be available from the internet from 1 October 2008. This will bring in the changes already notified in previous circulars.

All enquiries about this circular should be addressed to Christine.ross@scotland.gsi.gov.uk

Yours sincerely

IAN CLAPPERTON
Director of Operations