**Checklist for managing a request for payment of deferred benefits on ill-health grounds**

This checklist should start as you receive contact from a deferred pension asking for their deferred pension to be paid.

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| **Deferred member’s name:** |  |

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| Check the payment request carefully. If it is clearly a request for early payment on grounds of ill-health, proceed. If there is not a specific request for payment on grounds of ill-health use your judgement and ask questions to identify if this is what is being requested. | [ ]  |
| If the member has LGPS pensions with more than one employer liaise with the other employer to agree how you will tackle this. Making one referral to the Independent Doctor should save costs. | [ ]  |
| Check what information you have regarding the job the member was doing when they left ready for inclusion in the letter (see below). If you have limited information, consider the questions you need answering. | [ ]  |
| Write to the member. Wording for the letter is available in the Ill-health Toolkit. Purpose is to:* Acknowledge the request.
* Make it clear who is dealing with the case.
* Give them the “Claiming Your Deferred Pension Benefit Due To Ill-health” Leaflet.
* Give them the IHRC form to complete and explain it.
* Take the opportunity to get the job description and job hazards agreed with the individual.
 | [ ]  |
| Decide if you want to get your occupational health provider (OHP) to prepare the case and get reports from the member’s medical professionals. (this is not normally recommended). If so, instruct them. | [ ]  |

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| Prepare the following documents - Ill-health Pension Process: Guidance Note 2 gives further help: |  |
| * The IHRE1 – use the flow chart to choose which option in Part C.
 | [ ]  |
| * A purchase order (or include a purchase order number on the IHRE1
 | [ ]  |
| * A job description for EACH JOB involved – if this is an opt-out make sure you get the jd of the job they opted out from NOT the current job.
 | [ ]  |
| * A generic job specific person hazard/ risk assessment for EACH JOB involved.
 | [ ]  |
| * Information about required skills or attributes of the job which may be affected by MEDICAL considerations for EACH JOB involved.
 | [ ]  |
| * Further relevant details of the case.
 | [ ]  |
| * The relevant IHCERTD certificate/s. One is required for EACH JOB involved. See the IHRE1 and the flowchart for guidance on which certificate is needed. Make sure you complete part A and put the member’s name on each page.

**Note:** you should not be using one of the IHCERTDX forms without having discussed it with LGSS Pensions first. | [ ]  |
| * Make sure the employee returns the correctly completed IHRC. In particular they have:
* Ticked only ONE of the boxes in each of parts C, D and E.
* Provided both their GP and Consultants name and contact details.
* Signed and dated the document.

This should bear a recent signature and date when the case is referred to the Independent Doctor. Your IRMP Provider will be able to confirm the period between signature and referral within which the consent will be deemed valid; this is often a period of 4 weeks. | [ ]  |

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| Have you got all of the above documents? You can’t proceed until you have. | [ ]  |

Once all of the above is prepared

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| Prepare a single referral package for the independent doctor containing ALL of the above documents including the signed IHRC and any further details if provided by the employee (attached to the IHRC). | [ ]  |
| Send the package to the independent doctor (you may need to do this via your OHP so the medical information is attached) | [ ]  |
| Check for independent doctor’s confirmatory Email that the case has been received. | [ ]  |
| Deal with any issues raised in the confirmatory Email. | [ ]  |
| Inform the member when the independent doctor will do the first case assessment. | [ ]  |
| Check for independent doctor’s First Case Assessment Email. | [ ]  |
| Inform the member of the results of the first case assessment. | [ ]  |
| Arrange for member appointment if this is requested (it is rarely needed) | [ ]  |

**There may now be a delay as the independent doctor seeks out further information from the GP and specialists.**

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| The independent doctor should keep you informed of expected timescale. If they miss notified timescales by more than a few days chase the case. | [ ]  |

**Once the signed IHCERTD is received.**

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| Make sure you have also received the independent doctor’s report explaining why the form has been completed in the way it has. Ask the independent doctor for this if you have not received it. | [ ]  |
| Inform the member of the outcome of the referral. Suggested wording is available in the IH toolkit.  | [ ]  |
| Inform LGSS Pensions of the outcome by completing the employer’s declaration on the IHCERTD and copying it to them. (We will issue an application form with payment options if the individual qualifies for early payment). | [ ]  |