



Applying for ill health retirement - guidance

We understand that this can be a daunting time and so if you are considering applying for ill health, this guidance will explain the steps when applying for ill-health retirement.

Please note, there is no guarantee that an application to retire on the grounds of ill-health will be approved by the NHS Pensions Agency, an application for ill health retirement is a conditional application to retire.

- Firstly, double check which pension scheme(s) you are in (1995, 2008 or 2015) and check that you are eligible by clicking on this link - [Ill Health Retirement Factsheet](#)
- A formal absence review meeting will be held in line with the Attendance Policy with yourself and your Manager to discuss all options to you including Ill Health Retirement. If the outcome of this meeting is that you wish to be considered for Ill Health Retirement an updated OH report and request for the AW33E application form and illustration of potential benefits payable at Tier 1 and/or 2 will be arranged.
- If Occupational Health support the application, the HR contact will request for the form AW33E form (consideration of entitlement to ill health retirement benefits). HR will complete part A, you complete part B and return to your HR contact who will submit to Occupational Health for completion of part C. Your consent will be required for this to happen.
- Please note you may be required to attend a further Occupational Health appointment or may be asked to authorise further medical evidence from Occupational Health as part of the IHR application process, please note a delay in either of these can delay the outcome of the IHR application. Your consent will be required for this to happen.
- Once the AW33E form has been submitted from Occupational Health to NHS Pensions your Manager will arrange and organise an Ill Health Retirement dismissal panel meeting, which will be to end your contract of employment with NHSBT.
- Please note – once the AW33E form is submitted to NHS Pensions, NHS Pensions will submit the application to Medigold who then make a medical decision regarding your Ill Health Retirement application. Medigold then advise NHS Pensions of the decision. NHS Pensions will then notify you of the outcome of your application.
- If the Ill Health Retirement application has been successful, you will be required to complete an AW8 form and ask your Manager to validate your ID documentation.

- If your application is rejected, NHS Pension have a dispute process, whereby you would need to complete the DRP1 form on NHS Pensions website [DRP1 \(V10\) Online - 04.2019.pdf \(nhsbsa.nhs.uk\)](#)
- To follow up on your application, once submitted from OH to NHS Pensions, please see below for contact details:

NHS Pension

[NHS Business Services Authority members hub](#)

nhsbsa.pensionsmember@nhsbsa.nhs.uk

Telephone: 0300 330 1346

University Hospital Birmingham (918pensions@uhb.nhs.uk)

918pensions@uhb.nhs.uk

- **Medigold**

Tel: 0330 390 3370

E-mail: NHSBSA.admin@medigold-health.com

Your contract of employment will cease with NHSBT, please note that annual leave and notice periods will be incorporated when confirming a leave date. Your notice period will be paid in full and will be the greater of either contractual i.e Band 2,3,4,5 (4 weeks), Band 6 (8 weeks), Band 7,8 (12 weeks) or complete/continuous years of NHS/NHSBT service capped at 12 week.

Accrued but untaken annual leave is paid in your last salary, in line with NHS terms and conditions to be accrued up to the last date of annual leave. You will also continue to accrue annual leave during your notice period.

The Ill Health Retirement process is a Pensions process that runs simultaneously to NHSBT's internal process of serving notice once an Ill Health Retirement application has been submitted. Please note, once submitted, NHSBT have no control over the application itself and the timescale of when the outcome will be received from NHS Pensions as this will vary from case to case and pending on any further medical evidence that may be requested by the medical board. Therefore, your notice period may have already come to an end, prior to you receiving the outcome/decision from NHS Pensions.

If you have any questions regarding your application prior to been submitted to NHS Pensions, please contact the HR contact supporting you. Once the AW33E form has been submitted to NHS Pensions, you will need to contact NHS Pensions direct.