

*We have extensive experience in advising on ill health retirement and work with a large number of pension schemes.*

## What are ill health retirement assessments?

Part of Hobson Health's health referral programme, ill health retirement referrals assess individuals against agreed ill health retirement pension criteria

## Why are they needed?

To allow employees to access relevant pension benefits

## Who needs one?

Employees in a relevant pension scheme who are unfit to continue their contracted job role after all adjustments, adaptations, sickness absence and redeployment options have been considered and where their employment is to be terminated.

## How often are they needed?

- Before the termination of contract due to incapability, once all other options have been considered.
- The employee has a right to appeal the decision, but usually additional significant medical evidence would be required.

## What is the process?

- The employee may have been assessed by an occupational health advisor as part of the employer's absence / capability management processes.
- Up to date medical reports(s) would usually be obtained from the employee's GP and/or specialist.
- An appointment with an occupational health physician is required for medical assessment.
- A written application for ill health retirement is required, along with confirmation of the employee's impending termination of employment.
- The employee's medical evidence is assessed by independent occupational health physicians.
- The occupational health consultant will correspond with the referring manager with the relevant certificate as appropriate

**For further information, or if you have any questions about ill health retirements assessments, please call us on 01782 574200**

**www.hobsonhealth.co.uk**  
**01782 574200**