

Employer checklist for ill health applications

This checklist has been created to assist you when members request consideration of ill health retirement.

We recognise some organisations may use third party payroll providers, separate HR departments/occupational health and pension departments. To avoid delays we would suggest you/HR department start to consider initiating the ill health process when the member commences half pay. If you are a GP in England contact PCSE and if you are in Wales contact the Local Health Board.

We recommend during the ill health retirement process, that you do not terminate the members pensionable employment until the ill health retirement application has been assessed and the decision notified.

Please refer to our ill health guide for employers.

The following forms should be completed for consideration of ill health retirement benefits:

- AW33E – you can find this form in the retirement section of our employer forms webpage www.nhsbsa.nhs.uk/employer-hub/employer-forms
- AW240 – this should also be completed by the member if they have deferred membership

Serious ill health applications where life expectancy is less than 12 months.

Where life expectancy is less than 12 months, we recommend you also complete the following forms at the same time as the AW33E and before the member receives ill health retirement application approval:

- AW8 – retirement application form must be signed by the member and,
- AW341 – should be completed if the member wishes to exchange their serious ill health benefits to a one-off lump sum

Before returning any ill health retirement application forms to NHS Pensions, ensure all sections have been fully completed, signed and dated where appropriate.

- Check that the member has completed all relevant sections on part B of the AW33E, including the declaration and the consent has been signed and dated
- You have completed all sections of part A of the AW33E
- You have completed the employer 'Declaration' including your email address and employer stamp

If a member qualifies for ill health retirement benefits, you and the member will receive a letter from our medical advisors or NHS Pensions confirming this.