

## Notes of Guidance

# Completion of Medical Certificate for Deferred Members who Left on or after 1 April 2014

### The Completion of the Form

- If option A has been completed with 'IS NOT' **OR** option B with 'IS NOT', the deferred member **does not**, in the medical opinion of the approved registered medical practitioner, meet the criteria for early release of the deferred pension benefits under the LGPS.
- If option A has been completed with 'IS' **AND** option B with 'IS', the deferred member **does**, in the medical opinion of the approved registered medical practitioner, meet the criteria for early release of the deferred pension benefits under the LGPS.
- If 'IS' has been selected under option B, and the member is under age 55, part C should be completed.
- The opinion given by the approved registered medical practitioner does not, in itself, give entitlement or otherwise to early release of the deferred pension benefits under the LGPS. Nor should the medical practitioner indicate to the deferred member that such an award will or will not be made. It is for the former employer to make the formal award determination. If the former employer agrees to bring the deferred pension into payment early, the pension is payable from the date of the former employer's determination that the member meets the criteria for early release of the deferred pension benefits under the LGPS (and not from the date of the member's application for early payment or from the date the IRMP signs this certificate).

### Glossary of Terms

- The independent registered medical practitioner signing the certificate must have been approved for this purpose by the administering authority.
- 'Permanently incapable' means that the deferred member will, more likely than not, be incapable of discharging efficiently the duties of their former employment with the employer because of ill health or infirmity of mind or body until, at the earliest, their 'normal pension age'.
- The independent registered medical practitioner is providing an opinion on the deferred member's capability of undertaking gainful employment based solely on the effect the medical condition has on the member's ability to undertake gainful employment.
- 'Gainful employment' means paid employment for not less than 30 hours in each week for a period of not less than 12 months. It does not have to be employment that is commensurate in terms of pay and conditions with that of the member's former employment which gave rise to the deferred benefits in the Local Government Pension Scheme.
- 'Normal pension age' means the employee's individual State pension age at the time the deferred benefit is to be brought into payment, but with a minimum of age 65. State pension age is currently age 65 for men.

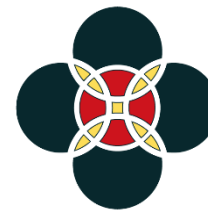
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- State pension age was equalised to age 65 in November 2018. State pension age will continue to increase from December 2018 onwards. To determine an individual's State pension age please go to <https://www.gov.uk/state-pension-age>

### **Disclaimer**

These notes were up-to-date when this form was updated in June 2019 and are provided for information only. They confer no contractual or statutory rights and in the event of any dispute the appropriate legislation will prevail.

**This is a medical certificate provided in respect of a deferred member by an independent, approved, duly qualified registered medical practitioner in accordance with regulation 36 of the Local Government Pension Scheme Regulations 2013.**



## Local Government Pension Scheme

### Medical Certificate for Deferred Members who Left on or after 1 April 2014

#### Section 1 – Deferred Member's Details (to be completed by the former Employer)

Name of Deferred Member:		Title:	
Home Address:			
		Post Code:	
NI Number:		Date of Birth:	
Employer at date of becoming a deferred Scheme member:			
Post title at date of becoming a deferred Scheme member*:			
Date of Termination:		Date of Application:	
* Please attach job description and any other applicable details to distinguish nature of employment at date of becoming a Deferred Scheme Member			

#### Section 2 – Medical Practitioner's Certification

<b>A</b>	I certify that, in my opinion, this deferred member <b>IS</b> / <b>IS NOT</b> <u>permanently incapable, because of ill health or infirmity of mind or body, of discharging efficiently the duties of his / her former employment</u> which gave rise to the deferred benefits in the Local Government Pension Scheme. (If deemed <b>IS</b> , please complete part B. (If deemed <b>IS NOT</b> , please proceed to Section 4).
<b>B</b>	I certify that, in my opinion, as a result of their ill health or infirmity, this deferred member <b>IS</b> <b>IS NOT</b> <u>unlikely to be capable of undertaking gainful employment</u> before reaching his/her normal pension age, or for at least three years, whichever is the sooner. (If deemed <b>IS NOT</b> , please proceed directly to Section 4).
If <b>IS</b> has been selected under <b>B</b> and the deferred member is <b>UNDER age 55</b> , please complete part <b>C</b> . If <b>OVER age 55</b> , please proceed to Section 4.	
<b>C</b>	I certify that, in my opinion, this deferred member <b>IS</b> <b>IS NOT</b> permanently incapable by reason of disability caused by physical or mental infirmity of engaging in any regular full-time employment. (Please now proceed to Section 4)

### Section 3 – Medical Practitioner’s Comments

### Section 4 – Medical Practitioner’s Declaration

I **DO**    **DO NOT**    attach a copy of my full report / assessment and certify that:

- I am registered with the General Medical Council **AND**
- I hold a Diploma in Occupational Health Medicine (D Occ Med) or an equivalent qualification issued by a competent authority in an EEA State (with ‘competent authority’ meaning given by Section 55(1) of the Medical Act 1983), or I am an Associate, a Member or a Fellow of the Faculty of Occupational Medicine or of an equivalent institution in an EEA State **AND**
- I have given due regard to the guidance issued by the Secretary of State when completing this certificate\*\*

\*\*The guidance document is available at <http://www.lgpsregs.org/index.php/dclg-publications/dclg-stat-guidance>

<b>Print Name:</b>			
<b>Signature:</b>		<b>Date:</b>	

<b>Official stamp: (if applicable)</b>	
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