

Live Active Leisure

ILL HEALTH RETIRAL PROCEDURE

The Administration & Staffing Manager will liaise with the Employment Disability Unit (EDU), the Company's HR Advisor and the Company's Medical Adviser throughout the following procedure.

Stage 1

Where an employee requests early retiral on health grounds, they will be required to complete an Application for Estimate of Benefits Form (Appendix 1) which will allow them to receive a quote of the estimated pension benefits they would receive should they retire early on health grounds. Should they wish to proceed with their application thereafter, a referral will be made to the Company's Medical Adviser.

Stage 2

Upon receipt of a report from the Company's Medical Adviser recommending ill health retiral (following a referral instigated by either the manager or the employee), a formal meeting will be convened by the manager in accordance with the Company's Sickness Absence Procedure to discuss the contents of the report.

Stage 3

During the formal meeting, the employee will be advised of the Company's Medical Adviser's recommendation and, where the employee and manager are in agreement, early retiral on health grounds should be granted immediately. Where either the manager or employee wish employment to continue, adjustments to the job for which the employee is considered medically unfit to perform must be considered and/or redeployment explored. The process of making adjustments to the employee's job calls for a flexible and creative approach tempered with realism. The following are examples of adjustments which could be made to accommodate the retention of an employee who is medically unfit to perform the full range of duties of their present job or an alternative job within the Company. This list is not exhaustive:

- Adjustments made to premises
- Allocating some of the employee's duties to another person
- Altering the employee's working hours
- Retraining
- Purchase or modification of equipment (funding may be available through the Employment Service)
- Utilisation of the government's Access to Work or Sheltered Placement Schemes, etc

Where appropriate, the Administration & Staffing Manager will, following consultation with the EDU, make a referral to the Disability Employment Adviser (DEA) of the Employment Service's Placing Assessment and Counselling Team (PACT). The DEA/PACT will produce a report which will assess the employee's capability and will also provide guidance on physical restrictions and duties to be avoided. The report will identify specific jobs or types of employment suitable to the employee and will indicate whether he/she would be eligible for a wage subsidy under the Sheltered Placement Scheme or support under the Access to Work Scheme.

Stage 4

If no reasonable adjustments can be made which will allow the employee to continue in their current job, redeployment may be a viable option which must be explored. The Administration & Staffing Manager will write to the managers detailing the nature of the employee's health problem and enclosing a resumé of the employee's skills, qualifications and experience in an attempt to identify a suitable alternative job. To ensure confidentiality, the employee will not be identified by name to other Company facilities at this stage. All company facilities are expected to co-operate in ensuring that the Company meets its obligations to employees who are disabled or who are medically unfit to continue in their present job.

Stage 5

Should a suitable alternative job of the same, or lower, grade than employee's current job be identified, a transfer can be effected within the employing Company facility or to another Company facility. This would not be in breach of the Company's Recruitment & Selection Procedure given the Company's over-riding legal obligation to find suitable alternative employment for an employee who is medically unfit to continue in their current job.

Should an employee be offered and accept a new job at a lower grade, their salary placing would be within that grade with no personal preservation relating to the grade of, or salary placing within, their previous job.

An appointment may be made to an alternative job on a trial basis for an agreed period with no contractual obligation placed upon the employee or the Company should the job prove to be unsuitable. Thereafter, redeployment will be explored further.

Stage 6

Where no suitable vacancy can be identified, a formal meeting will be convened in accordance with the Company's Sickness Absence Procedure and retirement on the grounds of ill health will be confirmed; this will be effective from the date of the meeting. The employee will receive a compensatory payment equivalent to pay in lieu of the notice period which they are unable to work. The employee will receive written confirmation of the outcome of the meeting within 5 working days and will have the right to appeal to the Company's Appeals Sub-Committee within 10 working days of receipt of the letter, briefly stating the grounds of their appeal.

An employee who feels that a wrong decision has been made regarding their pension benefits should, in the first instance, write to the Director of Finance who will forward the complaint to Dundee City Company as the Administering Authority of the Local Government Pension Scheme. The complaint will be considered by a panel appointed for this purpose by Dundee City Company in accordance with the Internal Disputes Resolution Procedure (Pensions Act 1995). The employee can appeal, thereafter, to the Secretary of State for Scotland regarding any dispute relating to pension regulations which they consider to be still unresolved.

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APPLICATION FOR ESTIMATE OF BENEFITS PAYABLE
ON THE BASIS OF EARLY/ILL HEALTH* RETIRAL

(*Delete as appropriate)

PLEASE COMPLETE IN BLOCK LETTERS

National Insurance Number

Surname

Forenames

Address

..... Post Code

Marital Status (married / single / divorced / separated / widowed)

(If widowed, divorced or legally separated, effective date)

Contact Tel No (home) (work)

Job Title

Place of work

Payroll No

Annual Salary/Weekly Wage £

Pensionable Remuneration £ (estimated)

(This figure should be the approximate amount of earnings on which superannuation has been paid in the last year. This does not include non-contractual overtime. If you are in doubt about this figure, please contact your salaries/wages section for assistance).

TO BE COMPLETED BY COMPANY'S HR ADVISOR

Full years of continuous service

Equivalent Weekly Salary = $\frac{£}{52}$ = £

Redundancy Payment = £ x weeks = £