

**P72d**

Version 3

**Medical practitioner's certificate for a deferred beneficiary
who ceased membership on or after 01/04/2014**

Former employer:*Please see Notes for guidance for help filling in this form:**Mandatory fields are marked with ****A. Deferred member's details***(To be completed by the employer)*

Title:	Surname*:	Forename(s)*:
Address*:		Home email: (if known)
Postcode*:		Contact number: Home/Mobile if known)
National Insurance number*:		Date of leaving scheme*:
Date of Birth*:		

Position (post title) and nature of employment (normal occupation) at date of becoming a deferred member* *[a job description and full information on requirements of the job must be attached for the doctor]:*

B. Medical Practitioner's certificate*(To be completed by the IRMP)*

This part is to be completed by an approved Independent Registered Medical Practitioner (IRMP) [see note 3]. Please refer to the relevant notes and definitions section on page 3 where appropriate.

Section 1*: In your opinion, is the member named in Part A, permanently incapable *[see note 4]*, because of ill health or infirmity of mind or body, of discharging efficiently the duties of his/her former employment which gave rise to the deferred benefits in the Local Government Pension Scheme? *[please tick as appropriate]*

B1: Yes ☐ → **Go to section 2** B2: No ☐ → **Go to Part C**

Section 2: Only complete this section if B1 has been ticked

In your opinion, is the member named in Part A, as a result of their ill health or infirmity unlikely to be capable of undertaking *[see note 5]* gainful employment *[see note 6]* before reaching normal pension age *[see note 7]*, or for at least three years, whichever is the sooner? *[please tick as appropriate]*

B3: Yes ☐ → **Go to section 3** B4: No ☐ → **Go to Part C**

Section 3: Only complete this section if B3 has been ticked and if the member named in Part A is under age 55. If the member named in Part A is over 55 please complete Part C

In your opinion is the member named in Part A permanently incapable, by reason of disability caused by physical or mental infirmity, of engaging in any regular full-time employment? *[please tick as appropriate]*

B6: Yes ☐ B7: No ☐

Please now complete Part C

P72d form – Summary member details (To be completed by former employer in case pages get separated)

Surname*:

Forename(s)*:

National Insurance number*:

Former employer*:

C. General statement

(To be completed by the IRMP)

Please sign and complete the details below as a declaration that the following statements are true:

- I am a Greater Manchester Pension Fund approved IRMP.
- I have not previously advised, or given an opinion on, or otherwise been involved in this case.
- I have given due regard to the guidance [see note 2] issued by the Secretary of State when completing this certificate.
- I am registered with the General Medical Council.
- 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' having the 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 an equivalent institution in an EEA State.
- I attach a copy of my full report/assessment.

Signature of IRMP*:

Printed name of IRMP*:

Date*:

IRMP/Company's Official Stamp:

For employer use only

(To be completed by employer as applicable)

D. Former employer's agreement to early payment of deferred benefits on ill health grounds

Please note: This Part is only to be completed by the employer on receipt of the medical opinion from the approved IRMP and where in light of this and in formally using its discretion, the employer has made the formal award determination to accede to the member's request for early payment.

The member named in Part A has requested early payment of retirement benefits on ill health grounds. I authorise payment of those benefits from the following date [see note 9]:

(Enter full date
dd/mm/yy:)

Go to Part E

E. Certified correct by authorised officer

Please note: This Part is only to be completed if Part D has been completed and early payment of deferred benefits agreed by the employer.

Signature:

Date:

For Pensions Office use only

Pensions Office stamp:

Notes for guidance: P72d, Medical Practitioner's certificate
for a deferred beneficiary who ceased membership
on or after 01/04/2014

Meaning of terms used

1. This is a medical certificate provided in respect of a **deferred** member in accordance with Regulations 36 and 38 of the Local Government Pension Scheme Regulations 2013 (as amended).
2. The latest versions of the statutory guidance are available at:
<http://www.lgpsregs.org/index.php/dclg-publications/dclg-stat-guidance>
3. The independent registered medical practitioner (IRMP) signing the certificate must have been approved for this purpose by the administering authority i.e. Greater Manchester Pension Fund.
4. **Permanently incapable** means that the person 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 retirement age [see note 7].
5. The IRMP is providing an opinion on the person's capability of undertaking gainful employment based solely on the effect the medical condition has on the ability to undertake gainful employment.
6. **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 person's former employment which gave rise to the deferred benefits in the Local Government Pension Scheme.
7. **Normal pension age** means the member's individual State pension age (SPA) [see note 8] at the time the deferred benefit is to be brought into payment, but with a minimum age of 65. For a full breakdown of individual SPAs see:
<http://www.pensionsadvisoryservice.org.uk/about-pensions/the-state-pension/know-your-state-pension-age>
8. SPA is currently age 65 for men. SPA for women is currently being increased to be equalised with that for men. Women's SPA will reach 65 by November 2018. The SPA will then begin to increase further for both men and women from December 2018 onwards. To determine an individual's SPA please go to:
<http://www.pensionsadvisoryservice.org.uk/about-pensions/the-state-pension/know-your-state-pension-age>
9. If the former employer formally uses its discretion and agrees to bring the deferred pension into payment early, the pension is payable from the date of the former employer's determination to release these benefits (and not from the date of the member's application for early payment or from the date the IRMP signs the certificate).

General

- If **B2** or **B4** have been ticked, this means that in the medical opinion of the approved IRMP, **the deferred member does NOT meet the criteria for early release of the deferred pension benefits under the LGPS.**
- If **B1** and **B3** have been ticked, this means that in the medical opinion of the approved IRMP, **the deferred member meets the criteria for early release of the deferred pension benefits under the LGPS.** It is then up to the former employer to formally use its discretion to award or not award the early payment of the deferred benefits on health grounds.
- 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 exercises its discretion and agrees to bring the deferred pension into payment early, the employer should complete and sign the employer only section of this form at Parts **D** and **E** on page 2 and then send to the Pensions Office. See note 9 above for the date the pension is payable from.

These notes were up-to-date when this form was updated in March 2016 and are given for information only. They confer no contractual or statutory rights and in the event of any dispute the appropriate legislation will prevail.

SAMPLE