



Medical practitioner's certificate for a deferred councillor member

EM72a

Version 3

**Former council:**

Please see *Notes for guidance for help filling in this form:*



Mandatory fields are marked with *

A. Deferred councillor member's details		(To be completed by the council)
Title:	Surname*:	Forename(s)*:
Address*:		Home email: (if known)
Postcode*:		Contact number: Home/Mobile if known)
National Insurance number*:		Date of leaving office as a councillor (and scheme)*:
Date of Birth*:		Date of application for early payment of deferred benefits*:
Position at date of becoming a deferred member. Councillor* [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)
<i>This part is to be completed by an approved Independent Registered Medical Practitioner (IRMP) [see note 2]. Please refer to the relevant notes and definitions section on page 3 where appropriate.</i> Section 1*: In your opinion, was the member named in Part A, at the date of application for early payment of deferred benefits shown in Part A, and on the balance of probabilities, permanently incapable [see note 3], because of ill health or infirmity of mind or body, of discharging efficiently the duties of his/her former office as a Councillor 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 and the person named in Part A is under age 55 at the date of application shown in Part A In your opinion, was the person named in Part A, at the date of application for early payment of deferred benefits shown 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] : B3: Yes ☐ —————> Go to section 3 B4: No ☐ —————> Go to section 3 Please note: The answer to this question is used to determine whether the pension should be immediately increased under Pensions Increase legislation. Section 3: Only complete this section if B1 has been ticked In your opinion is the member, named in Part A, exceptionally ill with a life expectancy of less than 1 year [see note 4]? [please tick as appropriate] B5: Yes ☐ B6: No ☐ If B5 'Yes' has been ticked, is the member aware of this? Yes ☐ No ☐ Please now complete Part C.		

EM72a form – Summary member details (To be completed by the former employer in case pages get separated)

Surname*:	Forename(s)*:
National Insurance number*:	Former council*:

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 am not acting, and have not at any time acted, as the representative of the member named in Part A, the former council, or any other party in relation to this case.
- 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 council use only (To be completed by council as applicable)**D. Former council's agreement to early payment of deferred benefits on ill health grounds**

Please note: This Part is only to be completed by the council on receipt of the medical opinion from the approved IRMP and where in light of this, the council has made the formal award determination that the deferred member named in Part A of this form meets the criteria for early release of the deferred pension benefits under the LGPS and decided 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 *[Date of application]*:

(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 council.

Signature:

Date:

For Pensions Office use only

Pensions Office stamp:

Notes for guidance: EM72a, Medical Practitioner's certificate for a deferred councillor member

Meaning of terms used

1. This medical certificate is provided in respect of a **deferred** councillor member in accordance with regulation 97 of the Local Government Pension Scheme (LGPS) Regulations 1997 (as amended) and for the purposes of section 229(4) of the Finance Act 2004.
2. 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.
3. **Permanently incapable** means that the person will, more likely than not, be incapable of discharging efficiently the duties of their former office with the council because of ill health or infirmity of mind or body until, at the earliest, their 65th birthday.
4. Certification of limited life expectancy of less than 1 year may only be provided by a fully registered person within the meaning of the Medical Act 1983. The full text of the Act can be found at:
http://www.gmc-uk.org/about/legislation/medical_act.asp#2

General

- If **B2** has 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** has 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.**
- The opinion given by the approved IRMP 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 council to make the formal award determination.**
- If **B5** has been ticked, the Pension Fund administering authority may pay the member a lump sum equal to 5 times the member's annual pension. If such a payment is made this does not constitute a pension input amount for the purposes of the annual allowance test under the Finance Act 2004 as the person meets the 'severe ill health condition' under section 229 of that Act.
- If the former council agrees to bring the deferred pension into payment early, the council should complete and sign the council only section of this form at Parts **D** and **E** on page 2 and then send to the Pensions Office.