

Transitional Protection - Ill-health criteria

October 2023



How does Transitional Protection affect Ill-health retirement?

If your member is affected by the Transitional Protection changes, they'll need to understand how this could affect any Ill-health benefits they currently receive or any application for Ill-health retirement.

While the Ill-health retirement criteria are still governed by the relevant legislation that's already in place for the Teachers' Pension Scheme, as part of the remedy to rectify the changes, there are several scenarios in which members will be eligible for Ill-health retirement assessment under both career average and final salary scheme rules. An overview of the eligibility criteria that are used to assess you is below:

Members not in pensionable employment post 1 April 2022 (entitled to reassessment against the alternative scheme criteria)

- If they applied for Ill-health retirement prior to 1 April 2022 and retired/died prior to 1 April 2022
- If they applied for ill-health retirement prior to October 2023, and upon making their Ill-health retirement application were assessed (and rejected) under final salary or career average and left pensionable employment before 1 April 2022 (deferred member).

Members not in pensionable employment post 1 April 2022 (entitled to assessment against the Ill-health Retirement criteria in both career average and final salary)

- If their Ill-health retirement application will be considered under both final salary and career average when referred to our medical advisers
- If they left pensionable employment before 1 April 2022 (deferred member) and applied for Ill-health retirement after 1 October 2023.

Members in employment post 1 April 2022

- If they applied for Ill-health retirement prior to 1 April 2022 and the outcome of their application is finally determined after 1 April 2022 they should be assessed against the Ill-health retirement criteria in both career average and final salary
- If they have service after 1 April 2022 and their first application for Ill-health retirement is after 1 April 2022 they'll be assessed against the criteria of the career average scheme only.