

# Medical Appeals and Reviews Training Card

## **1 Selecting Cases For Review**

### **1.1 Introduction**

This chapter will assist in the scheduling and selection of cases for IUE Review.

### **1.2 Updating Records**

The Medical Appeals and Reviews Team should obtain a spreadsheet list of all recipients of awards annually from the West Yorkshire Pension Fund. This should be sent via an appropriately secure method due to the nature of its contents. The spreadsheet should be saved in the 'Spreadsheet Records' folder.

The spreadsheet will require a number of updates to indicate the cases that should never be selected for review. These can be copied from the last existing spreadsheet. Those that should never be reviewed should include;

- Any persons identified at risk if required to return for review
- Those who have been certified as being permanently 100% **total** disabled (see Reg 7)
- Those who retired under the 1955 Regulations as Awards are calculated in an entirely different way and do not fall in the same four bands as known today.

#### **1.2.1 Developing a Schedule**

The actual number of cases selected for a review depends upon total number of cases, resourcing, other workloads and appeals and financial forecasting for the year. Financial forecasting is difficult due to the fact that other workloads are only estimated numbers and the number of appeals can only ever be an estimate.

It is also reasonable for the force to consider information obtained during the last IUE Review as part of the selection process, for example, the type of condition and whether or not it is expected to deteriorate or improve over time.

Taking all of the above into consideration, it is anticipated that reviews should take place as follows;

Band 4	-	Every 5 - 7 years
Band 3	-	Every 5 - 7 years
Band 2	-	Every 7 - 10 years
Band 1	-	Upon request only

There are exceptions to this rule that would mean reviews take place earlier or later than anticipated, these can include;

- Where a retired officer requests a review
- Condition dictates it should be sooner or later

- The officer has reached the compulsory retirement age for their rank or state pension age

It is anticipated that any review carried out on or shortly after the state pension age would be the last but this may not be the case in every circumstances depending upon the qualifying condition.

### **1.2.2 IUE Review – ‘Suitable Intervals’**

Initially it is expected that there will be a large number of awards that have not been reviewed for some time.

It is imperative that each individual case is assessed on its own merits prior to starting a review.

The officer selecting the case should take into consideration the following;

- Number of years since last assessment
- Type of condition and appropriate intervals for that condition
- Any other factors relevant to the individual case

### **1.3 Authorising Responsibilities**

It is the responsibility of the Medical Appeal and Review Team Senior HR Officer's to establish whether or not an award should be reviewed. Any cases where there is uncertainty on any ground should be referred to the direct Line Manager or the Director of HR for further consideration. This does not include sensitive issues that come to light during a review.