

Policies & Procedures for Processing

Disability Applications

The steps in this brochure will walk you through the standard procedures to prepare your disability application for review by the Board of Retirement.

The length of time to process your application will depend on the number of medical appointments required to document your disability.

You may want to share this information with your legal counsel.

If you have any questions, please call your LACERA Disability Retirement Specialist at 1-800-786-6464.

Policies & Procedures for Processing

LACERA

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*Disability
Applications*

Step 1. APPLICATION FOR DISABILITY RETIREMENT

In order to apply for disability retirement, a Disability Retirement Application must be submitted to LACERA. An application can be obtained by contacting LACERA. The application packet includes the following documents:

1. Disability Retirement booklet
2. Disability Retirement Application Instructions
3. Disability Retirement Application
4. Physician Statement
5. Claims Against Third Parties Form
6. Authorization to Obtain and Release Records
7. LACERA self-addressed, postage-paid envelope

Member must submit his Class Specification to his physician to use when filling out the Physician Statement. Copies of Class Specifications are available on the County's Web site at <http://hr.co.la.ca.us>. In addition, your Department or LACERA can assist you in obtaining a copy. Both the Physician Statement and Class Specification forms should be returned together.

Items 3, 4, 5, and 6 *must be completed and signed for an application to be accepted.*

No altered application or altered Authorization to Obtain and Release Records form will be accepted.

An incomplete or altered application will be returned to the member in its entirety. This can create a delay in the effective date for benefits.

Once the Disability Retirement Manager assigns the application to a Disability Retirement Specialist, the member will receive a letter of acknowledgement from LACERA's Disability Retirement Office.

Step 2. DISCOVERY AND OBTAINING RECORDS

The Disability Retirement Specialist may obtain all or some of the following records prior to interviewing the member:

1. Medical/Psychiatric Records
2. Veterans Hospital Records
3. DMV Records
4. Personnel Records
 - Time Cards/Payroll Records
 - Accommodation Documents
 - Performance Evaluations
 - Grievance Filings
 - Internal Investigations
5. Workers' Compensation
 - Benefit awards
 - Notice of Work Restrictions
 - List of all claims filed

Step 3. MEMBER IS INTERVIEWED

All members will be interviewed unless they are physically unable to communicate. If a member cannot be interviewed, a family member, friend, or attorney can assist by providing the investigator the required information. The interview will be conducted to obtain information regarding the following:

- Nature of Disability
- Physician Statement Diagnosis
- Summary of Workers' Compensation Claim
- Past Medical History
- History of Injury/Illness
- Occupational History/Physical Requirements
- Light Duty/Accommodated Assignments
- Current Symptoms/Complaints
- Non-Industrial Factors
- Delays in Filing the Application
- Witness Statements

All reports will state whether or not there is a delay in filing. If the recommendation is to grant a disability retirement, staff will also make a recommendation for

granting a retroactive benefit when applicable (see by-laws for retroactive effective date policy).

Step 4. MEDICAL EXAMINATION

LACERA has over 130 panel physicians who are Board Certified in various specialties. All applicants are expected to be examined by at least one of the panel physicians. The Disability Retirement Staff will do the following:

- Prepare a Disability Evaluation Summary Report
- Send Medical Records and Summary Report to Panel Physician
- Notify the member/attorney in writing of examination date. (The member is responsible for missed appointment fees.)

Step 5. CASE IS PREPARED FOR BOARD OF RETIREMENT MEETING

Once the application is ready to be reviewed by the Board of Retirement, the following will occur:

- Member/Attorney will be notified in writing of Board date
- Member will be notified that all cases are heard in closed session
- Member will not be told what the recommendation is until the Board has reviewed the application
- Member/Attorney may attend the closed session, but he/she may not address the Board regarding the application
- Member/Attorney will not be given copies of Board package until the Board has had the opportunity to review the application
- Member will be notified in writing of the Board's decision

The member will be provided information regarding the right to appeal the Board's decision. Procedures for the appeal process are printed in the Disability Retirement Hearing Procedures brochure.