

DISABILITY RETIREMENT ELIGIBILITY & APPLICATION INSTRUCTIONS

(For Department Filing on Behalf of Employee)

Department's Filing Responsibility

The County may not terminate an employee because of a disability if the employee is eligible to apply for a disability retirement from LACERA. Instead, the Department must apply to LACERA for a disability retirement on the employee's behalf, unless the employee waives the right to a disability retirement and elects to withdraw his or her contributions or take a deferred retirement. See Government Code Section 31721.

Disability Retirement Eligibility

- If the employee is in Retirement Plan A, B, C, or D, he/she is eligible to apply for a **service-connected** disability retirement any time during County employment.*
- If the employee is in Retirement Plan A, B, C, or D and has earned five years of County (or combined County and reciprocal system) retirement service credit, he/she is eligible to apply for a **nonservice-connected** disability retirement.*
- If the employee is in Retirement Plan E, he/she is **not** eligible for a disability retirement (Government Code Section 31487(f)(2)).**
- Members who terminate County service and withdraw their retirement contributions, forfeit all future benefits and may not apply for a disability or service retirement.
- Members who transferred to Plan D prospectively from Plan E must either have:
 - Completed two years of continuous service as an active Plan D member after his/her most recent effective date of transfer. (If the application for disability retirement is based on a preexisting condition, the employee must not have taken medical leave necessitated by that condition during those two continuous years of service.)
 - Earned five years of service credit as an active Plan D member after his/her most recent effective date of transfer (should there be a break in service).

Application Requirements

To apply for a disability retirement, submit the following documents to LACERA:

- Application for Disability Retirement.
- You may submit medical reports or records supporting the Department's claim that the member is permanently disabled. All medical conditions for which they are claiming permanent disability must be supported by medical evidence.

NOTE: As part of the disability evaluation process, LACERA may require an examination by one or more physicians appointed by the Board of Retirement.

- A copy of the Class Specification for the member's job.
- Any other pertinent data or records you believe will support the application.

* Other eligibility requirements apply to members who transferred prospectively to Plan D from Plan E.

** Most general plan members, including those in Plan E, may apply for benefits under the County's Long-Term disability and Survivor Benefit Plan (LTD-SBP). For more information on LTD-SBP, contact County DHR.

The Class Specification form must accompany the Application for Disability Retirement, along with any medical documentation, and be returned to LACERA in the enclosed self-addressed envelope. If any of the requested documents are incomplete, the application will be returned to you for completion. This delay will affect the processing of the application.

Note: The employer has the burden of proving to the Board of Retirement the member is permanently disabled for the performance of his/her duties. Thereafter, the member has the burden to prove the disability is a result of injury or illness arising out of and in the course of employment and the employment contributed substantially to the incapacity. All documents submitted to or obtained by LACERA to process the application for disability retirement are kept confidential.

If you need additional forms visit the Brochures & Forms page of lacera.com or call LACERA's Disability Retirement Services Division at 1-800-786-6464.