

**STEP BY STEP PROCEDURES**  
for  
**Disability Applications**



**Our goal is to expedite the disability process and to be sure benefits are understood by all members.**

**Stanislaus County Employees'  
Retirement Association**

**832 12th Street, Suite 600  
P.O. Box 3150  
Modesto, CA 95353-3150  
209-525-6393**

## Step 1. Application for Disability Retirement

In order to apply for a disability retirement, a Disability Retirement Application must be submitted to StanCERA.

An application can be obtained by contacting StanCERA. The application packet includes the following documents:

- Procedures of Disability Application brochure
- Disability Retirement Information & Frequently Asked Questions
- Disability Retirement Application & Questionnaire \*
- Claimant's Authorization to Attending Physician \*
- Physician Statement \*
- Authorizations to Obtain and Release Records Forms \*
- Claims Against Third Parties Form \*
- Missed Medical Appointment Form \*
- Copy of Article IX of the Bylaws, "Claim for Disability Retirement"

\*These items must be completed and signed for an application to be accepted.

Medical records and reports:

- All medical reports related to the claimed disability
- All medical reports within the last five years regardless of relation to the claimed disability.

The member must submit his/her Job Description and Job Task Analysis (JTA) to his/her physician to use when filling out the Physician Statement. Copies of Job Descriptions are available from your department or StanCERA can assist you in obtaining a copy. JTA's can be found at [www.co.stanislaus.ca.us/riskmgt/job%20task%20analysis.htm](http://www.co.stanislaus.ca.us/riskmgt/job%20task%20analysis.htm). Both the Physician Statement and Job Description forms should be returned together.

No altered application or altered Authorizations to Obtain and Release Records forms 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.

## Step 2. Member Assistance

If possible, the member should sit down with the retirement specialist to review the policies and procedures for submitting an application for a disability retirement benefit at the time the "disability packet" is obtained. If a member is unable to be present, a family member, friend, or attorney may obtain this information.

### Step 3. Disability Summary Report

The retirement specialist will review the application to determine if all required documentation has been received. The information to be reviewed and summarized is as follows:

- Nature of Disability
- Physician Statement Diagnosis
- Workers' Compensation Claim(s)
- Past Medical History
- History of Injury/Illness
- Occupational History/Physical Requirements
  
- Light Duty/Accommodated Assignments
- Current Symptoms/Complaints
- Non-Industrial Factors
- Witness Statements

The disability summary report will be reviewed by the Retirement Administrator who will determine further action.

### Step 4. Medical Examination

StanCERA may require you to be seen by a doctor at its expense. Retirement staff will do the following:

- Send medical records and reports with cover letter to designated physician.
- Notify the member/attorney in writing of examination date. (The member is responsible for missed appointment fees.)

### Step 5. Case Review by Legal Counsel

Once all summaries, records and reports have been processed, the case will be referred to legal counsel for evaluation and recommendation.

### Step 6. Case Preparation for Retirement Board Meeting.

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

- Member/Attorney will be notified in writing of Board meeting date.
- Member will be notified that all cases are heard in closed session (not open to the public).
- Member/Attorney will be advised of the right to attend the Board meeting and make a short statement prior to the closed session.
- The Board may approve, deny or set for hearing.

- 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 in the Bylaws and will be provided with notification.

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

The length of time to process your application will depend on medical appointments required to document your disability and/or conflicting medical records/reports.

If you have any questions, please call your StanCERA Disability Retirement Specialist at 209-525-6393

This brochure provides general information about disability retirement. If any discrepancies exist between information in this brochure and the law, the law will prevail. You are encouraged to call StanCERA's retirement office should you have any questions about the disability retirement process.