

Local Safety Employer Determination Checklist*

Once CalPERS has received a completed member or employer-originated application for disability retirement, the steps below provide an overview of what local safety employers must do before submitting their determination to CalPERS. Compliance with these steps will provide for more efficient application processing.

Step 1: Wait for CalPERS' notification:

- You received a letter from CalPERS requiring your medical determination within six months unless a waiver is obtained

Step 2: When making your determination, confirm the following:

- Reports substantiate the member has been disabled from their last day of work to the present
- Disability duration is permanent, expected to last 12 consecutive months or result in death
- Disability is based on an actual and present (not prospective) inability to perform the member's actual job duties
- Prophylactic restrictions are not the basis for the disability retirement determination
- Current objective examination findings support the determination

Note: *If current medical records do not provide competent medical opinion or there is a conflict in the current competent medical opinions, consider sending the member to an independent medical examination (IME) to obtain a competent medical opinion or to resolve the conflict.*

Step 3: Ensure your determination includes required information:

- Refer to our [Public Agency and School Reference Guide](#), Local Agency Determination Procedures section, and CalPERS' letter requesting your determination for information required in the determination

Step 4: Submit your determination to CalPERS with the following:

- Medical reports/IME report used to make the medical determination
- [Physician's Report on Disability \(Local Safety\)](#) form (Note: Form is not required if IME report is being submitted)
 - Includes specific work restrictions/job duties the member is unable to perform
- Copy of the member's job duty statement/job description
- [Physical Requirements of Position/Occupational Title \(Local Safety\)](#) form
 - If permanent accommodations have been made, the form is completed based on those duties
- [Workers' Compensation Carrier Request \(Local Safety\)](#) form

Step 5: Respond promptly to any additional requests for information or clarification:

- CalPERS may require additional information, as necessary, to complete the record or seek clarification

Failure to provide the required information to CalPERS within the established timeframe may result in a cancelation of the disability retirement application.

*The statements in this checklist are general. If there is a conflict between the law and this document, any decision will be based on the law and not this document.