



August 14, 2023

TO: Each Trustee,
Board of Retirement
Board of Investments

SUBJECT: Joint Organizational Governance Committee Meeting on August 17, 2023 –
Agenda item VI.C.

Following you will find supplemental information regarding the above-mentioned item.

Agenda item VI. C. Document Processing Assistant and Staff Assistant Study Classification
and Compensation Study
Attachment A and Attachment B

CLASSIFICATION TITLE: Disability Retirement Support Specialist-I, LACERA

ITEM NO: 0790

DEFINITION:

Provides administrative support to managers, supervisors, disability retirement specialists, investigators and legal staff in reviewing, researching, locating ~~and,~~ obtaining, and maintaining pertinent records from County of Los Angeles employees, County of Los Angeles departments, other entities and the courts, applicable to the processing of disability retirement claims and appeals ~~under general supervision infor~~ the Los Angeles County Employees Retirement Association (LACERA).

POSITION INFORMATION:

Positions allocable to this class, under the general supervision of a Disability Retirement Specialist Supervisor, are assigned ~~in—to~~ LACERA's Disability Retirement Services ~~Investigation~~ Division. This is a fully qualified journey-level classification, which is responsible for independently performing specialized duties in support of division operations. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit. Incumbents must exercise initiative and independent judgment within defined LACERA policies and procedures.

Incumbents review application documents, research, locate and obtain employment, medical, workers' compensation and other records required by disability ~~investigators~~ retirement specialists, staff and attorneys for the timely processing of disability claims and administrative appeal cases. Work requires knowledge of medical terminology and methods for obtaining discoverable records applicable to the processing of disability retirement claims. Incumbents must be proficient in prioritizing a high volume of requests to complete work within time standards. ~~Incumbents must exercise initiative and independent judgment within defined LACERA policies and procedures.~~

EXAMPLES OF ESSENTIAL JOB FUNCTIONS:

The following examples are intended to describe the general nature and level of work performed by persons assigned to each classification. Depending on the assignment, duties may include, but are not limited to the following:

Intakes, reviews, and processes disability retirement applications; ensures applications are complete and members meet minimum eligibility requirements for disability benefits; guides members throughout the process via telephone, e-mail, in-person, and through written correspondence; advises members regarding documents received and/or missing; obtains authorization from members to access confidential records; provides

guidance to departments applying for disability retirement benefits on behalf of their employees.

Researches and locates employment, medical, workers' compensation, legal, and other pertinent records applicable to a member's disability retirement application or appeal, as directed; arranges for copy service vendor to obtain requested records from outside entities; contacts and obtains records from other County departments and medical providers as needed; ensures all records ordered have been received; verifies records are accurate, complete, and apply to the individual whose claim is being processed; follows up to expedite the acquisition of records; notifies supervisors of delays, other issues, and potential need for subpoenas to obtain records.

Reviews, sorts, indexes, organizes, and maintains files of records received; copies, mails, and distributes letters and records to applicants, applicant attorneys, disability litigation staff, and others as required.

Receives and processes member appeals for disability retirement benefits which have been denied by the Board of Retirement; guides members through the disability appeals process via telephone, e-mail, in-person, and through written correspondence; responds to questions and concerns raised by applicants and others throughout the disability retirement application and appeals processes; ensures deadlines are met throughout the process.

Prepares administrative record related to applicant's disability; schedules medical examinations with applicants and medical providers as required.

Assigns a referee to oversee appeals processes; provides records to referees including exhibits, transcripts, affidavits, reports, and medical records; scans all records and provides to the Board and other parties as required.

Prepares correspondence including transcript memos, Board decision letters, declarations, appeal agendas, appeal transmittals, affidavits, medical request and supplemental request letters, and medical appointment letters; prepares documents and packets for Retirement Board; ensures reports and other information submitted is accurate, complete, and timely; edits and generates final reports to be submitted to the Board; copies and distributes reports and packets as needed.

Maintains electronic records and statistics of applications received, appeals received, records ordered, records received, status of assignments, applications processed, appeals processed, medical appointments scheduled, demographics of applicants, and other relevant information as directed.

Processes invoices from panel physicians and third-party copy vendor; checks medical fee schedules to ensure medical bills are charged correctly; adjusts invoices as necessary; seeks approval for invoices; submits invoices for payment. Performs Internet and other research to locate sources of records required for processing disability retirement claims and administrative appeal cases; verifies that records apply to the individual whose claim is being processed; locates employment, medical, workers' compensation and court records applicable to the case; arranges for copy service vendors to obtain requested records from outside entities; obtains records from other County departments.

~~Utilizes specialized software to track task requests and document status and completion of assignments; follows up with entities to expedite the acquisition of records; notifies supervisors of delays, other problems and potential need for subpoenas to obtain records.~~

~~Obtains sub-rosa and other discoverable information through private entities and carriers.~~

Performs special projects; prepares specialized ad hoc reports.

May handle a small disability retirement case load; interview applicants and witnesses; write evaluation reports; refer applicants to panel physicians; and make recommendations to the Board of Retirement.

May be required to perform other related duties as assigned.

REQUIREMENTS:

~~One (1) year of experience at the level of Staff Assistant II, LACERA maintaining medical and other records and data required for disability retirement processing~~

~~-OR-~~

Three (3) years of experience at the level of Senior Typist Clerk, LACERA or higher that provides experience in maintaining records related to and/or processing workers' compensation, insurance, retirement or related claims ~~or a class at a higher level that provides the requisite experience.~~

LICENSE: A valid California Class C Driver License or the ability to utilize an alternative method of transportation when needed to carry out job-related essential functions.

PHYSICAL CLASS II -- Light physical effort which may include occasional light lifting to a 10 pound limit, and occasional bending, walking, stooping or squatting. Incumbents sit for extended periods of time. Work is performed in an office environment in a controlled climate

CLASSIFICATION TITLE: Disability Retirement Support Specialist, LACERA

ITEM NO: 0790

DEFINITION:

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POSITION INFORMATION:

Positions allocable to this class, under the general supervision of a Disability Retirement Specialist Supervisor, are assigned to LACERA's Disability Retirement Services Division. This is a fully qualified journey-level classification, which is responsible for independently performing specialized duties in support of division operations. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit. Incumbents must exercise initiative and independent judgment within defined LACERA policies and procedures.

Incumbents review application documents, research, locate and obtain employment, medical, workers' compensation and other records required by disability retirement specialists, staff and attorneys for the timely processing of disability claims and administrative appeal cases. Work requires knowledge of medical terminology and methods for obtaining discoverable records applicable to the processing of disability retirement claims. Incumbents must be proficient in prioritizing a high volume of requests to complete work within time standards.

EXAMPLES OF ESSENTIAL JOB FUNCTIONS:

The following examples are intended to describe the general nature and level of work performed by persons assigned to each classification. Depending on the assignment, duties may include, but are not limited to the following:

Intakes, reviews, and processes disability retirement applications; ensures applications are complete and members meet minimum eligibility requirements for disability benefits; guides members throughout the process via telephone, e-mail, in-person, and through written correspondence; advises members regarding documents received and/or missing; obtains authorization from members to access confidential records; provides guidance to departments applying for disability retirement benefits on behalf of their employees.

Researches and locates employment, medical, workers' compensation, legal, and other pertinent records applicable to a member's disability retirement application or appeal, as directed; arranges for copy service vendor to obtain requested records from outside entities; contacts and obtains records from other County departments and medical

providers as needed; ensures all records ordered have been received; verifies records are accurate, complete, and apply to the individual whose claim is being processed; follows up to expedite the acquisition of records; notifies supervisors of delays, other issues, and potential need for subpoenas to obtain records.

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