

# Public Retirement System Medical Board Reviews: ELEMENTS OF SUCCESS

**Evaluating disability applications can be a complicated, challenging process for public retirement systems.** Medical records describing an array of injuries and conditions must be compiled and analyzed to make clinically sound determinations.



**Incomplete documentation or incorrect analysis during the evaluation process can lead to mistakes that can be costly in both financial and human terms.**

## Ensure well-documented case files



**Create a comprehensive medical record:** Assign case management responsibilities to credentialed clinicians with disability-specific experience in identifying and obtaining critical medical records. Engage in proactive record development by contacting member, employer or medical treatment sources for additional information when necessary.



**Probe health and medical records:** Assess the sufficiency of medical information for decision-making and then gather missing information to create a complete clinical picture. Developing a thorough, detailed case file from the beginning supports a fully-informed medical record and avoids unnecessary Independent Medical Examinations and/or Functional Capacity Evaluations.

## Utilize clinical expertise

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**Have board-certified physicians and psychologists involved in the medical review:** Clinicians from relevant specialties and subspecialties should be involved in evaluating disability claims by providing a medical board recommendation that includes; functional assessment(s), permanence of disability and determining duty or non duty-relatedness of disability.



**Provide the medical board with well-reasoned and clearly stated recommendations:** Medical boards should receive independent and unbiased recommendations that highlight the functional effects of physical illness or injury or a cognitive condition and that fully explain the basis for the recommendation.

## Synthesize clinical assessment with statutory requirements

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**Use system-specific definitions of disability:** Determine disability and work-related limitations by applying relevant statutes, regulations and definitions to produce clinically sound, evidence-based, independent medical board recommendations.

## How We Can Help

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**UMass Medical School** provides independent, timely and comprehensive medical board services to public organizations, including retirement systems and state agencies.

Our onsite team consists of more than 75 licensed clinical professionals — including over 30 multi-specialty physicians and psychologists — who can support the medical review and recommendation process. As state employees working in a publicly funded medical school, we embrace the service mission of public retirement systems. We understand that each public retirement system is unique in its approach. UMass Medical School has constructed our services with flexibility to meet your current and future needs.

## CONTACT

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