

# Exhibit A: Page 1

Status **Pending** PolicyStat ID **20204606**



San Bernardino County Employees'  
Retirement Association

Origination	1/8/2015
Last Approved	N/A
Effective	Upon Approval
Last Revised	2/2/2023
Next Review	3 years after approval

Area	Benefits
Applicability	SBCERA systemwide

## Disability Applicant – Independent Medical Examination

### POLICY NO. 015

The *Procedures for Disability Retirement Applications and Formal Hearings* states that the Chief Executive Officer or designee may arrange an appointment(s) with the physician or physicians so selected by the Board of Retirement (Board) or the Chief Executive Officer (CEO) for an examination of the applicant. In addition, the applicant is required to report at times and places specified by the CEO for one (1) or more medical examination(s) by a physician or physician(s) selected by the Board or CEO.

## I. Independent Medical Examination Appointment(s)

SBCERA will notify the applicant via mail of the name, address, date, time and place the applicant shall report for the medical examination.

For failure to keep the scheduled appointment, the applicant will be charged the actual cost for cancellation of the appointment if SBCERA incurs such expense. However, the fee will be waived if the applicant provides SBCERA with 72 hours advance notice of such

In the event the applicant fails to contact SBCERA with an adequate reason to reschedule the IME appointment within 30 days of the missed appointment, SBCERA may treat such action as noncooperation and recommend the application be dismissed with prejudice pursuant to Rule 33 of the *Procedures for Disability Retirement Applications and Formal Hearings*.

## II. Travel and Other Expense Reimbursement:

The Board shall pay all the costs of the examination itself, except the cancellation fee described above.

The member shall bear his or her own travel expenses to and from the appointment.

It shall be within the discretion of the CEO to consider and grant any written request of a member who incurs unexpected expenses (actual) under the provisions of this section if the CEO determines that such grant is necessary in order to process the application. The CEO shall determine the rates and conditions, if any, in accordance with the Board's intent and purpose in adopting this policy.

Reimbursements for unexpected expenses shall only be made upon the presentation of a written request from the member and submission of original receipts.

### **III. Applicant Residing Outside the State of California**

An applicant residing outside of California is still required to undergo a medical examination pursuant to Rule 4 of the Procedures *for Disability Retirement Applications and Formal Hearings*. SBCERA will make reasonable efforts to find an Independent Medical Examiner within the state where the applicant resides to perform the medical examination.

<b>Approval Signatures</b>		
<b>Step Description</b>	<b>Approver</b>	<b>Date</b>
Policy Owner & Chief Counsel Review	Barbara Hannah: Chief Counsel	Pending

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### **Applicability**

SBCERA, SBCERA Internal