

Status **Pending** PolicyStat ID **15437910**



San Bernardino County Employees' Retirement Association

Origination	12/2/2004
Last Approved	N/A
Effective	Upon Approval
Last Revised	3/13/2024
Next Review	3 years after approval

Area	Benefits
Applicability	SBCERA systemwide

Release of Cautionary Reports of Psychiatric Evaluations

POLICY NO. 007

I. Background

SBCERA often receives reports of psychiatric evaluations on behalf of members applying for disability retirement benefits. Sometimes a psychiatric evaluation includes the admonition that due to the highly complex nature of the information contained in the psychiatric evaluation serious misunderstanding of the report could result if the contents of the psychiatric evaluation were revealed to the patient. These cautionary admonitions further warn that if the information in the report is revealed to the patient it could harm the patient and/or the doctor-patient relationship. Cautionary admonitions strongly urge that these psychiatric evaluations not be revealed to the patient except in the presence of the undersigned doctor or some other appropriate medical expert. And yet, these members may have the right to review these cautionary psychiatric evaluations if the Board relies upon these reports in making its decision on the member's disability retirement application.

II. Policy

A. Member Represented by Attorney

In disability retirement applications involving psychiatric reports, psychiatric evaluations containing cautionary admonitions against release to the patient will be given to the member's attorney.

B. Member in Pro Per Not-Represented by Attorney

In disability retirement applications involving psychiatric reports, psychiatric evaluations containing cautionary admonitions against release to the patient will be given to the member's attending physician or the physician writing the report provided the physician agrees to receive

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and review the report with the member. The member will be advised to discuss the review and/or release of the psychiatric evaluation with the physician receiving the report.

Approval Signatures

Step Description	Approver	Date
Chief Executive Officer Review	Debby Cherney: Chief Executive Officer	Pending
Chief Counsel Review	Barbara Hannah: Chief Counsel	3/13/2024
	Barbara Hannah: Chief Counsel	3/13/2024

Applicability

SBCERA, SBCERA Internal

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