San Bernardino County Employees' Retirement Assoc.

Staff Report Details (With Text)

File #:	19-1283.1	**Name:**	
Type:	Consent Item		
File created:	2/20/2021	**In control:**	BOARD OF RETIREMENT
On agenda:	3/4/2021	**Final action:**	
Title:	Approve updates to Benefits Policy No. 007 - Release of Cautionary Reports of Psychiatric Evaluations.		
Sponsors:			
Indexes:			
Code sections:			
Attachments:	1. Exhibit A: Benefits Policy No. 007 (Issue 3.0) – Release of Cautionary Reports of Psychiatric Evaluations - Redline		

Date	Ver.	Action By	Action	Result

FROM: Barbara Hannah, Chief Counsel

SUBJECT: Approve updates to Benefits Policy No. 007 - Release of Cautionary Reports of Psychiatric Evaluations.

RECOMMENDATION:
Approve updates to Benefits Policy No. 007 - Release of Cautionary Reports of Psychiatric Evaluations.

BACKGROUND:
General Policy No. 005 involves the periodic review of Board policies and indicates that the Administrative Committee review Benefits policies every three years. SBCERA often receives reports of psychiatric evaluations on behalf of members applying for disability retirement benefits. Benefits Policy No. 007 requires that any psychiatric report containing a cautionary admonition will be given to an Applicant's attorney or treating physician. The update to the Policy formalizes SBCERA's current practice to obtain the physician or doctor's acknowledgment and agreement to receive and review with the pro per Applicant the report as a condition to release the report to the physician or doctor. Additionally, the issue number and effective date should be updated.

No other changes are recommended.

Attached as Exhibit A is a redlined version of the proposed changes.

COMMITTEE REVIEW:
This item was reviewed by the Administrative Committee at its February 18, 2021, meeting and recommends Board approval, with a 4-0 vote.

BUDGET IMPACT:

None.

STRATEGIC PLANNING GOAL/OBJECTIVE:
Operational Excellence & Efficiency

STAFF CONTACT:
Barbara Hannah

ATTACHMENTS:
Exhibit A: Benefits Policy No. 007 (Issue 3.0) - Release of Cautionary Reports of Psychiatric Evaluations - Redline