



**PERMANENT MEMORANDUM 34  
PROCEDURE FOR REVIEWING DISABILITY RETIREMENT CLAIMS  
UNDER THE OPTIONAL RETIREMENT PLAN**

POLICY DIGEST

Monitoring Unit:  
Initially Issued: December 8, 1998  
Last Revised: December 3, 2002

- I. Eligibility for normal retirement under the Optional Retirement Plan is as follows:
  - A. Participant must have 5 years of service and must be at least 60 years old, or
  - B. Participant must have 20 or more years of service at any age.
  
- II. Eligibility for disability retirement under the Optional Retirement Plan is as follows:
  - A. Participant must have 5 years of creditable service in the Teacher's Retirement System's Optional Retirement Plan.
  - B. Participant must provide medical evidence that he or she is totally and permanently disabled and should be retired.
  
- III. Procedure used to determine disability:
  - A. The employee must submit medical documentation from a physician certifying that the employee is mentally or physically incapacitated and unable to perform their duties, and that the medical condition is likely to be total and permanent. The employee bears all costs associated with this medical opinion. In the event that the employee resigns in connection with a disability claim, the employee is required to submit the necessary medical documentation no later than 30 days from the date he or she tendered the resignation.
  
  - B. The LSU System reserves the right to require an independent medical examination by a physician from a panel of physicians designated by the TRSL State Medical Disability Board to determine if the employee is totally and permanently disabled. The University bears the burden of all costs associated with the second medical opinion. The LSU System may require the second medical opinion no later than 30 days from the date the employee submitted his or her original medical documentation.
  
  - C. If the second medical opinion concurs with the first, the first physician's opinion will stand and shall not be subject to further appeal. If the second medical opinion does not agree with the first opinion, a third medical opinion may be requested within 30 days. The third physician must be jointly approved by the University and the employee. The majority opinion of the three doctors will stand and shall not be subject to further appeal. The cost of the third medical opinion shall be borne by the LSU System if the employee is certified as totally and permanently disabled; otherwise, the cost shall be borne by the employee.
  
  - D. If the employee is approved for a normal service retirement or a disability retirement, and he

or she is enrolled in the Office of Group Benefits Plan, the LSU System will inform the Office of Group Benefits that the employee is eligible to continue their life and medical coverage as a retiree.

- E. If the employee is approved for a normal service retirement or a disability retirement, the LSU System will pay up to 200 hours of sick leave and 300 hours of annual leave at the time of retirement.