

OCERS Board Policy

Disability Retirement Reassignment Policy

Purpose and Background

1. The purpose of this policy is to encourage the reassignment of disability retirement recipients in alternate positions under Sections 31725.5, 31725.6 and 31725.65 of the California Government Code, to provide staff with a method for delivering benefits and related services to those members and their beneficiaries and to manage the assets of the system in a prudent manner.

Policy Objectives

2. The objectives of this policy are to:
 - a. Provide a method by which the Board of Retirement (Board) can establish that a member who is permanently incapacitated from performing the duties of their position may be medically qualified to perform the duties required of an alternate position with an OCERS' employer;
 - b. Facilitate communication between OCERS, permanently incapacitated members and employers to identify those members who will engage in a reassignment plan and to identify available positions meeting the member's medical criteria;
 - c. Provide guidance to OCERS' staff and the employer to ensure appropriate treatment during the reassignment period and upon subsequent retirement.

Policy Guidelines

3. The Board adopts the following approach for all disability retirement recipients who are reassigned under Sections 31725.5, 31725.6 or 31725.65 of the California Government Code:
 - a. Reassigned members will be considered active members of the retirement system for all purposes except death benefit entitlement;
 - b. Reassigned members will not be entitled to a second disability retirement;
 - c. Reassigned members will receive a supplemental disability retirement allowance, which will be the difference between the job salary for the position that the member is permanently incapacitated from performing and the job salary for the alternate position. The supplemental disability allowance will not exceed the amount of the member's original disability retirement allowance, as adjusted by Cost of Living increases;
 - d. Reassigned members will pay contributions to OCERS and earn service credit;
 - e. Reassigned members will have their disability retirement allowances recalculated at the time of retirement from the alternate position.

Policy Review

4. The Board will review this policy at least every three years to ensure that it remains relevant and appropriate. In the event of legislative changes to the pertinent sections addressed in this policy, the Board will review the policy as appropriate.



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Policy History

5. The Board adopted this policy on April 17, 2006. The Board reviewed this policy on August 24, 2009, November 19, 2012, July 17, 2017 and April 19, 2021

Secretary's Certificate

I, the undersigned, the duly appointed Secretary of the Orange County Employees Retirement System, hereby certify the adoption of this policy.

A handwritten signature in black ink that reads "Steve Delaney" is enclosed in a rectangular box.

04/19/2021

Steve Delaney
Secretary of the Board

Date