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Why Retirement Systems should consider **VOCATIONAL REVIEW**

Issue

Whether the task is determining if a disability retirement applicant is prevented from performing their past public employment or whether they are able to adjust to other substantial work, administering disability benefit claims is a complex process that requires a sophisticated skill-set to ensure accurate and objective determinations. A wealth of diverse, hands-on experience is needed to assess function, consider permanence, and determine duty-relatedness and transferability of skills for workers with disabilities.



Engaging a team of qualified physicians and psychologists to provide independent disability recommendations provides the medical expertise retirement system administrators need to operate their disability retirement programs. Experienced medical consultants determine the impairment severity and prognosis and evaluate a member's functional abilities and limitations. However, high quality disability evaluation also includes a comprehensive vocational assessment so that disability applicants receive a thorough analysis of their vocational skills and abilities before a final recommendation is rendered.

Current Laws and Regulations

Every retirement system functions under their own unique set of laws with differing definitions of disability. Nevertheless, whether a retirement system's statutes define disability as *ordinary*, *line of duty*, or *accidental*, consideration of vocational factors related to the applicant's ability to perform prior work or other employment within the member's aptitude and abilities are a critical part of the decision-making process.

The Importance of Vocational Experts

Vocational experts are tasked with monitoring job trends and labor market conditions, and possess considerable knowledge of the qualifications and skills needed for employment across numerous industries.

They are also adept at synthesizing information gathered from an individual's education, training, functional limitations and work history. Collecting and evaluating vocational evidence from public employers and member applicants from the outset is key to ensure that accurate determinations are made.

To provide the most accurate and convincing analysis possible, our vocational experts use state-specific statistics that are updated regularly to reflect changes within the local job market of each retirement system.

Ultimately, vocational experts are in the best position to accurately determine if the medically-assessed capacities and restrictions of those with impairments, preclude them from doing their job, and ascertain, function-by-function, if they have the ability to perform other types of work.

How We Can Help

At UMass Medical School, we have been in the practice of providing high caliber medical and vocational reviews since 1998. During the past 20 years, we have assembled vocational experts who are located on-site, in one building to create a seasoned, cohesive team.

Our vocational experts' research, testimony, and recommendations provide value for retirement systems because our methodology cannot be duplicated by those without highly specialized training. Our disability determination team includes 15 master's-prepared vocational rehabilitation counselors with the credential of Certified Rehabilitation Counselor (CRC). Our CRCs have a minimum of eight years of field experience in rehabilitation and disability determination, must complete continuing education units, and provide proof of maintenance of CRC status.

Our rigorous CRC standards ensure our skilled team of experts are prepared to conduct comprehensive vocational analyses, including:

- Compare a member's limitations (as assessed by our physicians and/or psychologists) with the actual physical and mental demands of their past work, function-by-function.
- Translate the member's physical and/or mental limitations into the exertional ranges of work as defined by the USDOL, e.g., sedentary, light, medium, heavy work, and very heavy work.
- Evaluate the further impact of non-exertional functional limitations including mental restrictions.
- Consider the member's social history, vocational profile; age, education, training, past relevant work experience, and specific vocational preparation needed to complete a job.

Our CRCs have developed operational guidelines and evidence-based vocational tools to support correct and prompt decision-making. Vocational issues addressed include:

- Loss of use of one upper extremity
- Limitations on sitting with capacity to do light or sedentary work
- Transferability of skills
- Ability/inability to sustain satisfactory work performance over a 40-hour work week
- Environmental, communicative, and postural limitations on the ability to perform work

Our vocational experts, are also able to evaluate whether an individual would benefit from vocational rehabilitation services. If employment is not found within an individual's current functional capabilities, they dig deeper to identify relevant on-the-job trainings and/or short term academic or vocational skill development to assess if an individual can be retrained for other employment at comparable wages. After a comprehensive vocational review, we present our findings in a functional assessment and vocational rehabilitation report.

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