



Appeals Committee

Item Number 4 – Open Session

Subject: Education: Appeal Issues Series on Disability and Survivor Benefits

Presenter(s): James Stassi

Item Type: Information

Date & Time: April 2, 2021 – 15 minutes

Attachment(s): None

PowerPoint(s): Disability and Survivor Benefits Appeals Issue Overview

PURPOSE

The purpose of this item is to provide an overview of the appeal issues the Disability and Survivor Benefits (DaSB) division has administered in the last five calendar years.

DISCUSSION/SUMMARY

The Appeals Committee has expressed interest in learning more about the types of issues each business area encounters as well as statistical data related to the number of Decisions, Determinations, and administrative hearings. This informational item will provide the Appeals Committee with the requested information regarding substantive issues and related statistical data pertaining to various stages of the administrative appeals process.

Between 2016 and 2020, DaSB has issued on average 130 Decision letters each year with denials of disability applications comprising over 90 percent of all DaSB Decisions. The remaining Decisions include other disability issues, such as workers' compensation offsets and the continuing qualifications process, in addition to a handful of Decisions issued each year by Survivor Benefits involving issues related to option benefit elections or changes thereto. In total, DaSB has issued 597 Decision letters over the past five years. Of the total Decisions issued to members and beneficiaries, 118 (or 20 percent) have requested an Executive Review, comprising the largest number of Executive Review requests received by CalSTRS. Of the total Decisions issued to members and beneficiaries, 118 (or 20 percent), have requested an Executive Review. Of the 118 Determinations issued, ten (or 1.5 percent), have requested an administrative hearing. In every instance the administrative law judge's proposed decision upheld CalSTRS' Determination and was adopted by this Appeals Committee.

Staff will provide more details on the types of appeal cases in the oral presentation.