



RETIREMENT BOARD POLICY AND REFERENCE MANUAL

SUBJECT: ESTABLISHING EFFECTIVE DATES FOR DISABILITY RETIREMENTS	Section: 2-26 Date Adopted/Revised: 1/14/2026
SYSTEM(S): JOINT	Approved:  Retirement Administrator

PURPOSE

The purpose of this policy is to establish effective dates for disability retirement where the applicant files for disability retirement before or after termination from City service.

POLICY

An application for disability retirement is considered to have been filed if the individual has submitted a disability retirement application, a medical release, and associated medical evidence in support of the applicant's disability.

Applicant Files for Disability Retirement before Termination From City Service

1. For purposes of establishing the effective date of a disability retirement where the applicant has not terminated from City service and is still on City payroll at the time the Retirement Board makes a determination on the disability retirement application, including applicants on leave without pay:

Policy: The effective date of the disability retirement will be the earlier of (1) the day after the employee's last day of pay on City payroll, including but not limited to City paid Health & Welfare benefits and/or temporary disability payments issued by the City's Third Party Administrator or (2) the day after the Board grants the disability application.

2. For purposes of establishing the effective date of a disability retirement where the applicant filed an application for disability retirement prior to termination from City service and is in a terminated or retired status at the time the Retirement Board makes a determination on the disability retirement application:

Policy: The effective date of the disability retirement will be the day after the applicant's termination from City service, namely, the day after the applicant's last day as an active City employee, or the date of service retirement, whichever is earlier, and any change in benefit amount will be adjusted retroactively to the date of disability retirement.

Applicant Files for Disability Retirement after Termination From City Service

1. For purposes of establishing the effective date of a disability retirement where the applicant files a disability application after termination from City employment for any reason, including applicants discharged by the City, applicants in a deferred vested status, or applicants receiving a service retirement benefit:

Policy: The effective date of the disability retirement will be the day after the Board grants the disability retirement application. In the case of an applicant who has retired for service, any change in benefit amount between a service retirement and a disability retirement will be prospectively modified as of the disability effective date.

Board Discretion:

The Board retains discretion to excuse late filing of a disability application in situations where circumstances of the disability are a factor in the late filing. Among the factors which the Board will consider are the applicant's disabling condition and the impact of that condition on the applicant's ability to file timely. The burden of providing information regarding this situation rests with the applicant.

Corrected 1099s

1. When a service-connected disability retirement is granted with a retroactive disability retirement effective date, corrected 1099s will only be issued for the three open tax years.

1. Adopted 02/10/2006
2. Annual Review, administrative changes, revised 3/11/2009
3. Administrative changes 05/11/2016
4. Administrative changes 02/08/2017
5. Administrative changes 1/14/2026