



# PROSPER UPDATES

## *Administrator Training*



PERAC Real-time Online Self-service  
Environment for Regulation

DISABILITY | TRANSMITTAL | 91A

WINTER 2019

# Disability Administrator Training Topics

- Home page
  - Disability MP and Transmittals
  - 91-A
  - Memos
  - Tabs
  - Tasks
  - Notifications
  - E-Mails

My Recommendation

Log in Daily

# Overview

- Disability Home
  - Medical Panel Request status
  - PROSPER Medical Panel Processing
- Start Medical Panel/Involuntary Medical Panel
  - Forms
  - Medical Records
  - Under Review
  - Withdraw/Deny

# Help

- For Log-in and Password Issues
  - Contact the Help Desk
- Medical Panel Submissions
  - Contact the Disability Unit
- Specific Transmittal Questions
  - Contact Ellen Furtado
- Specific 91 A issues
  - Contact Sandy King



# Home Page

TAUNTON

Massachusetts Public Employee Retirement Administration Commission

Hello, Paul

Sign Out

Home

Tasks

Compliance

Notifications

Medical Panel Request has  
been put under review.

Disability

268A Term Pledge for Peter  
is due by 4/24/2017.

**CME  
91A  
Tabs have been  
added**

Home - Taunton

PERAC Memos

Q

All Years ▾

Memo #6/2017  
2017  
Mandatory Retirem...

Memo #9/2017  
2017  
Buyback And Make...

Memo #2/2017  
2017  
The Binding Effect ...

Memo #3/2017  
2017  
2017 Limits Under C...

Memo #4/2017  
2017  
2017 Limits Under S...

Memo #5/2017  
2017  
Cola Notice

Memo #1/2017  
2017  
Updated Public Rec...

Memo #7/2017  
2017  
Actuarial Data

Memo #8/2017  
2017  
Continuing Membe...

Memo #10/2017  
2017  
Domestic Relations...

Memo #12/2017  
2017  
2017 Interest Rate S...

Memo #11/2017  
2017  
2017 Annuity Savin...

Memo #22/2016  
2016  
Forfeiture Of Retire...

Memo #23/2016  
2016  
Tobacco Company ...

Memo #24/2016  
2016  
Mandatory Retirem...

Memo #20/2016  
2016  
Reinstatement To S...

Memo #25/2016  
2016  
Other Post-employ...

Memo #26/2016  
2016  
Appropriation Data ...

Memo #27/2016  
2016  
Tobacco Company ...

Memo #28/2016  
2016  
2016 Disability Data

Memo #29/2016  
2016  
The Buyback Of Ca...

Memo #21/2016  
2016  
Updating Perac?s W...

Memo #30/2016  
2016  
840 Cmr 10:10(3) & ...

Memo #17/2016  
2016  
Tobacco Company ...

Once logged in you will see your retirement board and greeting.

# Memos

CAMBRIDGE

Massachusetts Public Employee Retirement Administration Commission

Hello, Ellen

Sign Out

Home

Tasks

Compliance

Disability

Consultant Certification has been assigned to you.

Placement Agent Statement has been assigned to you.

Procurement Money Manager Vendor Disclosure has been assigned to you.

Vendor Certification has been assigned to you.

Notifications

Completion of Retiree Evaluation - Unable

Appointment Confirmed

Appointment Confirmed

Appointment Confirmed

PERAC Memos

All Years

Memo #15/2018 2018 Tobacco Company...	Memo #14/2018 2018 Interest Payments...	Memo #13/2018 2018 Mandatory Ethics T...	Memo #12/2018 2018 Perac V. Crab & Ot...	Memo #11/2018 2018 Investment Relate...	Memo #10/2018 2018 2018 Interest Rate...
Memo #9/2018 2018 Actuarial Data	Memo #8/2018 2018 840 Cmr 10:10(3) &...	Memo #7/2018 2018 Ncpers 2018 State...	Memo #6/2018 2018 Buyback And Make...	Memo #5/2018 2018 Mandatory Retirem...	Memo #4/2018 2018 Tobacco Company...
Memo #3/2018 2018 Cola Notice	Memo #2/2018 2018 2018 Limits Under...	Memo #1/2018 2018 2018 Limits Under...	Memo #38/2017 2017 2017 Disability Data	Memo #37/2017 2017 3(8)(c) Reimburse...	Memo #36/2017 2017 Information Neede...
Memo #35/2017 2017 Forfeiture Of Retir...	Memo #34/2017 2017 Administrator's Tr...	Memo #32/2017 2017 Tobacco Company...	Memo #31/2017 2017 Appropriation Data...	Memo #30/2017 2017 Mandatory Retirem...	Memo #29/2017 2017 Vendor Disclosures
Memo #28/2017 2017 Selection Of Fifth...	Memo #27/2017 2017 Reinstatement To...	Memo #26/2017 2017 Access To Prosop...	Memo #25/2017 2017 The Repeal Of G.L...	Memo #24/2017 2017 Cost Of Living Incr...	Memo #23/2017 2017 Mtrs C. 32. Section...

Memos are listed with the most recent first.  
A search function and year selection is available for locating specific memos.

# Tabs

TAUNTON

Massachusetts Public Employee Retirement Administration Commission

Hello, Paul.

Sign Out

Home

Compliance

Disability

Tasks

Notifications

Medical Panel Request has been put under review.

268A Term Pledge for Peter is due by 4/24/2017.

268A Term Pledge for Gill is due by 4/24/2017.

Annual Eligibility for Dennis is due by 4/24/2017.

Annual Eligibility for Barry is due by 4/24/2017.

Home - Taunton

PERAC Memos

All Years ▾

Memo #6/2017 2017 Mandatory Retirem...	Memo #9/2017 2017 Buyback And Make...	Memo #2/2017 2017 The Binding Effect ...	Memo #3/2017 2017 2017 Limits Under C..	Memo #4/2017 2017 2017 Limits Under S..	Memo #5/2017 2017 Cola Notice
Memo #1/2017 2017 Updated Public Rec..	Memo #7/2017 2017 Actuarial Data	Memo #8/2017 2017 Continuing Membe...	Memo #10/2017 2017 Domestic Relations..	Memo #12/2017 2017 2017 Interest Rate S..	Memo #11/2017 2017 2017 Annuity Savin...
Memo #22/2016 2016 Forfeiture Of Retire...	Memo #23/2016 2016 Tobacco Company ...	Memo #24/2016 2016 Mandatory Retirem...	Memo #20/2016 2016 Reinstatement To S..	Memo #25/2016 2016 Other Post-employ...	Memo #26/2016 2016 Appropriation Data ...
Memo #27/2016 2016 Tobacco Company ...	Memo #28/2016 2016 2016 Disability Data	Memo #29/2016 2016 The Buyback Of Ca...	Memo #21/2016 2016 Updating Perac?s W.	Memo #30/2016 2016 840 Cmr 10:10(3) & ...	Memo #17/2016 2016 Tobacco Company ...

Administrators can have permission for Compliance, Disability, 91A depending on your user access. Tabs will show based on the permission given. Choosing a Tab will open that specific application.



# Tasks

**ZZTEST PERAC** Massachusetts Public Employee Retirement Administration Commission Hello, Chuck Sign Out

**Home**

**Tasks**

- Vendor Certification has been assigned to you.
- Vendor Disclosure has been assigned to you.
- Placement Agent Statement has been assigned to you.
- Consultant Certification has been assigned to you.
- CME Member information for Pasty Cornish is due by 5/19/2017

**Notifications**

- Appointment Complete
- Appointment Confirmed
- Appointment Scheduled

**Home - Zztest PERAC**

**PERAC Memos**

Search: [ ] All Years: [v]

<b>Memo #17/2017</b> 2017 Mandatory Retirem...	<b>Memo #16/2017</b> 2017 Tobacco Company...	<b>Memo #15/2017</b> 2017 Sts/Istar Event
<b>Memo #11/2017</b> 2017 2017 Annuity Savin...	<b>Memo #10/2017</b> 2017 Domestic Relation...	<b>Memo #9/2017</b> 2017 Buyback And Make
<b>Memo #5/2017</b> 2017 Cola Notice	<b>Memo #4/2017</b> 2017 2017 Limits Under...	<b>Memo #3/2017</b> 2017 2017 Limits Under...
<b>Memo #2/2017</b> 2017 The Binding Effect...	<b>Memo #1/2017</b> 2017 Updated Public Re...	<b>Memo #30/2016</b> 2016 840 Cmr 10:10(3) &...
<b>Memo #29/2016</b> 2016 The Buyback Of Ca...	<b>Memo #28/2016</b> 2016 2016 Disability Data	<b>Memo #27/2016</b> 2016 Tobacco Company...
<b>Memo #26/2016</b> 2016 Appropriation Data...	<b>Memo #25/2016</b> 2016 Other Post-employ...	<b>Memo #24/2016</b> 2016 Mandatory Retirem...

**Tasks will remain on the list until the task is completed!**

Also on the Home Page are current Tasks and Notifications.  
Tasks are items that need an action to be taken.



# Task Page

**ZZTEST PERAC**
Massachusetts Public Employee Retirement Administration Commission
Hello, Chuck
Sign Out

Home
Tasks
Compliance
Disability

Vendor Certification has been assigned to you.  
Vendor Disclosure has been assigned to you.  
Placement Agent Statement has been assigned to you.  
Consultant Certification has been assigned to you.  
CME Member information for Pasty Cornish is due by 5/19/2017

**Notifications**  
Appointment Complete  
Appointment Confirmed  
Appointment Scheduled  
Disability Transmittal Complete  
Appointment Complete  
Appointment Complete  
Appointment Complete

Back

**Member Information Request for Pasty Cornish**

**Current Information Form**

Name of Retirement Board  
Zztest PERAC

SSN  
\*\*\*-\*\*-2002

Member Last Name\*  
Cornish

Member First Name\*  
Pasty

M.I.

Suffix

Street Address\*  
123 Pasty Ave #4

City\*  
Wausau

State\*  
WI

Zip\*  
54403

Phone #\*  
(715) 555-1212

Email

Date of Birth  
1/12/1960

Date of Hire

Job Title  
RepoMan

Date of Retirement  
5/5/2012

Type of Disability

Employer Name (current)  
EmpNamestuff

Employer Title (current)  
Repo

Employer Street Address (current)  
123 EmpStreet

City  
Empville

State  
WI

Zip  
54401

This retired member was awarded benefits based on the following incapacitation and/or impairment:  
Pasty Cornish had too much corn.

Submit

Selecting a specific task will bring you to that task. Once a task is complete it will disappear from the Task list. The task will remain on the home page until completed.

# Board Task-Task Page

**BOSTON** Massachusetts Public Employee Retirement Administration Commission Hello, Michael Sign Out

**Task Overview**

Disability Transmittal Board Action Requests 6

CME Member Information Requests 0 Susp

gsA Salary Verifications 2 Termination Requests 71

**Disability Transmittal - Board Action Requests**

Name	Status Date
Gilbert	8/22/2018
Lamar	9/26/2018
James	10/5/2018
Christine I	10/5/2018
David	10/4/2018
Kenneth	9/28/2018

**Alternate View**  
Board will be able to review Cases based upon the task.

The task tab allows you to manage tasks based on process. When you select a specific task type, Board Action Request for the Disability Transmittal process, a list of the members in that process with that task will be displayed in a list. Selecting a specific member name brings you to the task that needs to be completed. This view is especially helpful when there are a large number of tasks for more than one process.

# Notifications

**TAUNTON** Massachusetts Public Employee Retirement Administration Commission Hello, Paul Sign Out

Home Tasks

**Notifications**

- Medical Panel Request has been put under review.
- 268A Term Pledge for Peter is due by 4/24/2017.
- 268A Term Pledge for Gill is due by 4/24/2017.
- Annual Eligibility for Dennis is due by 4/24/2017.
- Annual Eligibility for Barry is due by 4/24/2017.

Home - Taunton

PERAC Memos

Search: [ ] All Years ▾

**Notifications only show for 30 days!**

<b>Memo #6/2017</b> 2017 Mandatory Retirem...	<b>Memo #9/2017</b> 2017 Buyback And Make...	<b>Memo #2/2017</b> 2017 The Binding Effect ...
<b>Memo #1/2017</b> 2017 Updated Public Rec..	<b>Memo #7/2017</b> 2017 Actuarial Data	<b>Memo #8/2017</b> 2017 Continuing Membe...
<b>Memo #22/2016</b> 2016 Forfeiture Of Retire...	<b>Memo #23/2016</b> 2016 Tobacco Company ...	<b>Memo #24/2016</b> 2016 Mandatory Retirem...
<b>Memo #27/2016</b> 2016 Tobacco Company ...	<b>Memo #28/2016</b> 2016 2016 Disability Data	<b>Memo #29/2016</b> 2016 The Buyback Of Ca...
<b>Memo #20/2016</b> 2016 Reinstatement To S...	<b>Memo #25/2016</b> 2016 Other Post-employ...	<b>Memo #26/2016</b> 2016 Appropriation Data ...
<b>Memo #21/2016</b> 2016 Updating Perac's W.	<b>Memo #30/2016</b> 2016 840 Cmr 10:10(3) & ...	<b>Memo #17/2016</b> 2016 Tobacco Company ...

Notifications are items that are primarily informational, but may need action by you or another Board Member. Notifications show for 30 days only.

# Notification Page

The screenshot shows a web application interface for the Massachusetts Public Employee Retirement Administration Commission. The header bar is dark blue with the text "TAUNTON" on the left, "Massachusetts Public Employee Retirement Administration Commission" in the center, and "Hello, Paul" and "Sign Out" on the right. A left sidebar contains navigation links: "Home" (with a house icon), "Tasks" (with a checkmark icon), "Compliance" (with a checkmark icon), and "Disability" (with a person icon). The "Notifications" section is highlighted with a red box. The main content area displays a "Back" button, a greeting "Dear Paul Slivinski," and a notification message: "Your Medical Panel Request for Roberta Johnson has been put Under Review. The following questions were asked: Need more details on the job description and the attachment for the Employers Statement only had 2 of the 3 pages..". Below the notification, there are four task items: "268A Term Pledge for Peter is due by 4/24/2017.", "268A Term Pledge for Gill I is due by 4/24/2017.", "Annual Eligibility for Dennis is due by 4/24/2017.", and "Annual Eligibility for Barry I is due by 4/24/2017.".

**TAUNTON** Massachusetts Public Employee Retirement Administration Commission Hello, Paul Sign Out

**Home** **Tasks** **Notifications**

Medical Panel Request has been put under review.

268A Term Pledge for Peter is due by 4/24/2017.

268A Term Pledge for Gill I is due by 4/24/2017.

Annual Eligibility for Dennis is due by 4/24/2017.

Annual Eligibility for Barry I is due by 4/24/2017.

Back

Dear Paul Slivinski,

Your Medical Panel Request for Roberta Johnson has been put Under Review. The following questions were asked: Need more details on the job description and the attachment for the Employers Statement only had 2 of the 3 pages..

Selecting a notification will display the full notification.

# Email & Notifications

- Medical Panel request under review
- Appointment Scheduled/Confirmed/Cancelled
- Medical Panel Results
- Withdrawal/Deny acknowledgement

perac-mailing@per.state.ma.us  
to me ▾

Dear Marceline

An appointment on 6/7/2018 at 01:30 PM for Paul has been scheduled with William Donahue, M. D. at 123 Test ave testville MA, 11111. For your convenience, follow this link to print off the directions:  
<https://www.google.com/maps/dir/543+Lunn's+Way,+Plymouth,+MA,+02360/123+Test+ave,+testville,+MA,+11111/am=1>

**CONFIDENTIALITY NOTICE** This electronic message and any attachments are intended only for the addressee(s) and contains information that may be privileged and confidential. If you are not the intended recipient, please notify the sender by reply email and immediately delete this message. Use, disclosure or reproduction of this email by anyone other than the intended recipient(s) is strictly prohibited. Thank you. This message is sent by an automated email system. Please do not reply to this email message as this mailbox is not monitored.

4:53 PM (18 hours ago) ☆ ↩ ▾

**They will remain available for review for 30 days only.**

# Disability Home

**ZZTEST PERAC** Massachusetts Public Employee Retirement Administration Commission Hello, Chuck Sign Out

Home  
Compliance  
Disability

## Disability Home

Start Medical Panel Request

Start Involuntary Panel Request

Start Disability Transmittal

+ Member Medical Panel Requests

+ Member g1A Status: 2016

On the right side of the box you will see a history link. Once the member has completed the Disability process, the file contents will move over to history. You will be able to view from this link.

The Disability Home page is set up in 2 sections, Top 3 boxes will start a process, the 3 horizontal lines will contain your cases, history and information.

# Medical Panel Requests

**BERKSHIRE COUNTY RETIREMENT BOARD** Massachusetts Public Employee Retirement Administration Commission Hello Board D Admins Sign Out

Home  
Disability

Disability Home

Start Medical Panel Request Start Involuntary Panel Request Start Disability Transmittal

— Member Medical Panel Requests

Member Name	Request Date	Employer	Current Status
Test1 Joint	Thu Sep 01 2016	Co Name	Pending Scheduling
Test2 Joint	Thu Sep 01 2016	Co Name	Panel Complete
Test3 Joint	Thu Sep 01 2016	Co Name	Pending Scheduling
Test4 Joint	Thu Sep 01 2016	Co Name	Request Submitted
Test5 Joint	Thu Sep 01 2016	Co Name	Panel Complete
Test1 Single	Thu Sep 01 2016	Co Name	Request Submitted
Test2 Single	Thu Sep 01 2016	Co Name	Request Submitted

+ Member Disability Transmittals

As you can see this will provide the member name, Date of Panel request, the employer and the current status.



# Medical Panel Page

**STATE** Massachusetts Public Employee Retirement Administration Commission Hello, Theresa Sign Out

**Medical Panel Request**

**Request Information**

Member Name: Lisa  
 Social Security #: \*\*\*-\*\*-0000  
 Application Date: 7/18/2017  
 Panel Type: Joint  
 Disability Type: Voluntary  
 Voluntary Accidental  
 Appointment Type: Standard Appointment  
 Board: Retirement Board  
 Medical Condition: Leg

**Status Information**

Request Submitted: 8/28/2017  
 Request Under Review:  
 Pending Scheduling: 10/16/2017  
 Scheduling Hold:  
 Appointment Scheduled: 10/16/2017  
 Appointment Confirmed: 11/2/2017  
 Appointment Complete: 11/10/2017  
 Results Distributed: 12/5/2017

Forms	Complete	Attachments
Disability Application	✓	1
Employer's Statement	✓	1
Treating Physician's Statement	✓	1
Physician List	✓	
Medical Records	✓	3
Injury Report	✓	1
Official Job Description	✓	1

**Appointments & Certificates**

Date	Time	Vendor	Doctor(s)	Specialty	Location	Certificate
11/9/2017	4:30 PM	QME	Jay Ellis Laurence Cohen John Goldberg	Orthopedic Orthopedic Neurology/Neuro Surgery	Springfield, MA	<a href="#">View</a>

To view or print  
certificate(s)  
and narrative(s)  
open this link

Medical Panel Request Page. Member information, Status of the Request, Forms submitted to PERAC. When appointments are scheduled they will update this page, When certificate/narratives are completed they will be available here as well.

# PROSPER Processing

- What has not changed
  - Role of Board and PERAC
  - Information provided to the physicians
- What has changed
  - Documents will be uploaded by the Retirement Board and submitted at the time of Request
  - PROSPER will make records available to MD's at date of schedule
  - No mailing 3 copies of records

# Start Medical Panel Request

The screenshot shows the BERKSHIRE system interface. The top navigation bar includes the BERKSHIRE logo, the text 'Massachusetts Public Employee Retirement Administration Commission', and user information 'Hello, Board D Admin1' with a 'Sign Out' link. A left sidebar contains icons for Home, Disability, and Documents. A large red arrow points from the text 'Voluntary Involuntary' to a red-bordered box containing three buttons: 'Start Medical Panel Request', 'Start Involuntary Panel Request', and 'Start Disability Transmittal'. Below these buttons are three expandable sections: 'Member Medical Panel Requests', 'Member Disability Transmittals', and 'Member g1A Status: 2016'.

BERKSHIRE

Massachusetts Public Employee Retirement Administration Commission

Hello, Board D Admin1 Sign Out

Voluntary Involuntary

Start Medical Panel Request

Start Involuntary Panel Request

Start Disability Transmittal

+ Member Medical Panel Requests

+ Member Disability Transmittals

+ Member g1A Status: 2016

These buttons will only be enabled for Administrators.  
Board members and chairs will not be able to start this process.  
Selecting either of these will open the member information page for the member information to be entered.

# Enter Member Information

**BERKSHIRE COUNTY RETIREMENT BOARD** Massachusetts Public Employee Retirement Administration Commission Hello Board D Admin1 Sign Out

Medical Panel Request  
Back

**Disability Information**

☐ Check if this panel request is for an accidental death only:  
Choose all that apply:\* ☐ Ordinary Disability ☐ Accidental Disability  \* NOTE: If multiple Accidental Disability selections are necessary, create a Medical Panel request for each selection.

Is this request to an Appeal or Court Decision.\*

**Member Contact Information**

Social Security # \*  Member Last Name \*

The retirement board hereby requests the Public Employee Retirement Administration Commission to conduct a regional medical panel examination for the above named member who applied for disability retirement on:

Application Date \*  mm/dd/yyyy

This member has claimed total incapacity based on the following medical condition(s):\*

Knee  Please describe in detail.

**Important!  
Verify SSN before  
entering!**

**Must complete the  
whole page to save  
the information.**

You must complete **all** fields.  
Court Decisions must be attached if applicable.  
Presumptions will appear in Drop Down if you choose Accidental.  
Once all questions are completed a Form checklist will be created based upon the information you entered.  
Enter Body part and Diagnosis (from Treating Physician's Statement)

# Required Forms

	Ordinary	Accidental	9 Accidental Death	Involuntary Ordinary	Involuntary Accidental	heart presumption	lung presumptions	Cancer presumption
<b>Documents</b>								
Application for Disability Retirement	R	R				R	R	R
Treating Physicians Statement	R	R				R	R	R
Regional Medical Panel Selection Form	R	R				R	R	R
Injury Reports		R						
Employers statement	R	R		R	R	R	R	R
Official job description	R	R		R	R	R	R	R
Pre-employment Physical						R	R	R
Admin Court Decisions (if applicable)	R	R				R	R	R
Medical Records	R	R		R	R	R	R	R
HRD file								
Statement of Facts			R	R	R			
Death Certificate			R					
Medical Panel Reports			R					

# Form Checklist

**BERKSHIRE COUNTY RETIREMENT BOARD**Massachusetts Public Employee Retirement Administration CommissionHello Board D Admin1Sign Out

[Home](#)  
[Compliance](#)  
[Finance](#)  
**[Disability](#)**

[Back](#)  
**Medical Panel Request** Board Admin: Board D Admin1  

**Request Information**  
**Social Security #** \*\*\*\*-\*\*-g888  
**Member** James E rowe

Forms	Assigned	Complete	Attachments
<a href="#">Disability Application</a>	Board Disability Admin		
<a href="#">Employer's Statement</a>	Board Disability Admin		
<a href="#">Treating Physician's Statement</a>	Board Disability Admin		
<a href="#">Physician List</a>	Board Disability Admin		
<a href="#">Medical Records</a>	Board Disability Admin		

[Save](#)[Submit](#)

A list of required Forms based upon this application will populate.  
The Red Complete button will remain until the form is uploaded.  
You are required to open and complete each section.

# Medical Panel Request

ZZTEST PERAC  
Massachusetts Public Employee Retirement Administration Commission

Home  
Compliance  
Disability

Back

Medical Panel Request

Request Information

Social Security # \*\*\*-\*\*-5634  
Member sfdgsdf sfdgsd  
Disability Type Ordinary D

Forms

Disability Application  
Employer's Statement  
Treating Physician's Statement  
Physician List  
Medical Records  
Appeals or Court Decisions  
Injury Report  
Official Job Description

Employer's Statement

Board: Zztest PERAC  
Member: sfdgsdf sfdgsd  
Social Security #: \*\*\*-\*\*-5634  
Application Type: Application for Ordinary Disability

Employer's Statement Form (please attach) \*

Please upload the employer statement form.

[Add Attachment](#)

Employer's Statement Info \*

Please enter the essential duties that the applicant is required to perform in his or her current position. (From Question 1 of Employer's Statement Pertaining to Member's Application for Disability Retirement.)

Date Employment Began\*

Cancel Submit

Attachment

No file selected Browse...

Make sure you scroll down in the pop up boxes , to make sure you have completed all fields.  
Must be pdf.

Each section will need to be completed by the administrator.  
Answer all of the questions. Followed by attaching the relevant document.



# Medical Records

- By Facility/physician Date Range
- File size for Prosper is <15MB (approx. 200 pages)
- Pdf format
- Name of file
- Facility(physician) 2015-2017 part 1
- Facility(physician) 2015-2017 part 2
- Example
  - Mass General Hosp 2012-2017 part 1
  - Mass General Hosp 2012-2017 part 2
  - Dr. Doctor 2003-2017
  - Get Well Physical Therapy Jan-June 2012

**IMPORTANT!**

Make sure to include date ranges.

Last 5 years of medical records.

# Medical Panel Request

**STATE**Massachusetts Public Employee Retirement Administration CommissionHello, TheresaSign Out

HomeDisability

Back

Involuntary Medical Panel Request

**Request Information**

**Social Security #** \*\*\*-\*\*-0000**Disability Type** Ordinary Disability  
**Member** Karen Rowe

History

Forms	Assigned	Complete	Attachments
Employer's Statement	Disability Admin	-	
Medical Records	Disability Admin	-	
Involuntary Retirement Application			
Other Documents			
Injury Report	Disability Admin	-	

WithdrawDenySubmit

**Do not include medical records!**

**Other Documents DO NOT get sent to the Dr.'s, please make sure any medical records are attached to the Medical Records section!!**

# Medical Panel Request *(Continued)*

BERKSHIRE COUNTY RETIREMENT BOARD

Massachusetts Public Employee Retirement Administration Commission

Hello Board D Admin1   Sign Out

Home

Compliance

Finance

Disability

Back

Medical Panel Request   Board Admin: Board D Admin1

Request Information

Social Security #

Member

g888

James E rowe

Forms	Assigned	Complete	Attachments
Disability Application	Board Disability Admin	—	
Employer's Statement	Board Disability Admin	—	
Treating Physician's Statement	Board Disability Admin	—	
Physician List	Board Disability Admin	—	
Medical Records	Board Disability Admin	—	

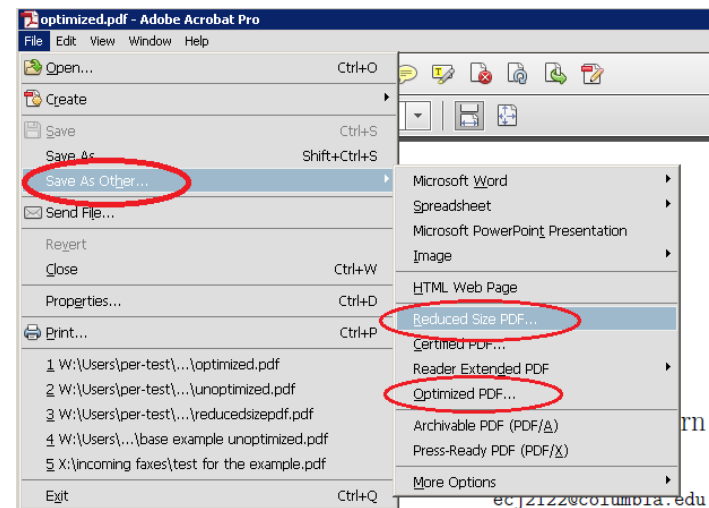
Save

Submit

Please provide a complete list of all physicians to avoid having to re-schedule panels.

# Scanning Guidelines

- Incorrectly configured scanners or scanning software can create a file significantly larger than it should be (remember, all files must be <15MB)
- Not every scanner and its software have the same options. The following options are recommendations\*:
  - Scan with a DPI setting of 300
  - Scan documents as black and white (not color or greyscale)
  - As a general rule, aim for less than 200 pages if possible
  - (Acrobat) save as “Optimized PDF”
  - (Acrobat) save as “Reduced Size PDF”



**\* IMPORTANT: Refer to your local IT staff for scanning support.**  
**PERAC cannot provide technical support for scanners or related software.**

# Medical Panel Request

Employer's Statement

 **ERROR:**

- There are some errors, please correct them below:
- The field Essential Duties is required.
- The field Employment Began is required.

Board:

Zztest PERAC

Member:

sfdgsdf sdfgsd

Social Security #:

\*\*\*-\*\*-5634

Application Type:

Application for Ordinary Disability

— Employer's Statement Form (please attach) \*

Please upload the employer statement form.

Add Attachment

If required information is missing an error message will appear.

# Medical Panel Request *(Continued)*

BERKSHIRE COUNTY RETIREMENT BOARD

Massachusetts Public Employee Retirement Administration Commission

Hello, Board D Admin1 Sign Out

Home

Disability

Back

Medical Panel Request Board Admin: Board D Admin1

Request Information

Social Security # \*\*\*-\*\*-2342  
Member Renee Member1

Forms	Assigned	Complete	Attachments
Disability Application	Board Disability Admin	✓	1
Employer's Statement	Board Disability Admin	✓	1
Treating Physician's Statement	Board Disability Admin	✓	1
Physician List	Board Disability Admin	✓	
Medical Records	Board Disability Admin	✓	1

Save

Submit

Once all forms are complete and documents attached the request can be submitted.

# Medical Panel Request *(Continued)*

**BERKSHIRE COUNTY RETIREMENT BOARD** Massachusetts Public Employee Retirement Administration Commission Hello, Board D Admin1 Sign Out

Home Disability

Back

Medical Panel Request Board Admin: Board D Admin1

**Request Information**

Social Security # \*\*\*-\*\*-2342  
Member Renee Member1

Forms	Assigned	Complete	Attachments
<a href="#">Disability Application</a>	Board Disability Admin	✓	1
<a href="#">Employer's Statement</a>	Board Disability Admin	✓	1
<a href="#">Treating Physician's Statement</a>	Board Disability Admin	✓	1
<a href="#">Physician List</a>	Board Disability Admin	✓	
<a href="#">Medical Records</a>	Board Disability Admin	✓	1

By entering my name, checking the Electronic Signature box, and clicking on the buttons, I certify under the penalty of perjury that the information provided herein is true and complete to the best of my knowledge.

First Name \* MI Last Name \* Suffix  
Board D Admin1

The electronic signature must match the name Board D Admin1.

☒ I acknowledge that I am electronically signing this form \*

This form was signed and submitted on 9/30/2016 at 8:58 AM by Board D Admin1

The administrator is required to electronically sign the request before submission to PERAC. It is expected that the board will submit the request for a medical panel when a complete medical record has been obtained. You cannot add additional medical's once the request has been submitted to PERAC.



# Medical Panel Request (Continued)

**STATE** Massachusetts Public Employee Retirement Administration Commission Hello, Theresa Kerrigan Sign Out

Home Disability

Form	Assigned	Complete	Attachments
<a href="#">Back</a> <a href="#">Application</a>	Disability Admin	✓	1
<a href="#">Employer's Statement</a>	Disability Admin	✓	1
<a href="#">Treating Physician's Statement</a>	Disability Admin	✓	1
<a href="#">Physician List</a>	Disability Admin		
<a href="#">Medical Records</a>	Disability Admin		
<a href="#">Injury Report</a>	Disability Admin		
<a href="#">Official Job Description</a>	Disability Admin		

By entering my name, checking the Electronic Signature box, and clicking on the buttons, I certify under the penalty of perjury that the information provided herein is true and complete to the best of my knowledge.

**First Name\*** Theresa **MI** **Last Name\*** Kerrigan **Suffix**

The electronic signature must match the name Theresa Kerrigan

☒ I acknowledge that I am electronically signing this form\*

✓ **COMPLETE:** This form was signed and submitted on 6/7/2018 at 11:55 AM by Theresa Kerrigan

Once submitted you cannot  
add documents  
(such as additional medicals)

Once the request has been submitted to PERAC a complete banner will appear to confirm

# MP Under Review

**BERKSHIRE COUNTY RETIREMENT BOARD** Massachusetts Public Employee Retirement Administration Commission Hello, Board D Admins Sign Out

Home Disability Documents

Back

**ALERT:** - Perac D User on 2/20/2017 at 12:06 PM  
Dear Board Admins,  
Your Medical Panel Request has been put Under Review. The following questions were asked. Please provide additional information on the member's Injury report. The report did not provide enough detail on how the member was involved.

**Medical Panel Request**

**Request Information**

Social Security # \*\*\*\*-\*\*-4573  
Member David Peterson

Forms	Assigned	Complete	Attachments
Disability Application	Board Disability Admin	-	1
Employer's Statement	Board Disability Admin	-	1
Treating Physician's Statement	Board Disability Admin	-	1
Physician List	Board Disability Admin	-	
Medical Records	Board Disability Admin	-	1
Injury Report	Board Disability Admin	-	1
Official Job Description	Board Disability Admin	-	1

Submit

You will receive a notification on your home page. Go to Member list Open the Case

If there is any missing fields or additional information needed by PERAC the request can be put under review. A notification will be sent with specifics about what information is needed.

# MP Deny/Withdraw

**BERKSHIRE COUNTY RETIREMENT BOARD** Massachusetts Public Employee Retirement Administration Commission Hello Board D Admin1 Sign Out

Home Compliance Finance Disability

Back

Medical Panel Request Board Admin: Board D Admin1

**Request Information**

Social Security # \*\*\*\*\*-9888  
Member James E rowe

**Before submitting  
After submitting**

Forms	Assigned	Complete	Attachments
Disability Application	Board Disability Admin	-	
Employer's Statement	Board Disability Admin	-	
Treating Physician's Statement	Board Disability Admin	-	
Physician List	Board Disability Admin	-	
Medical Records	Board Disability Admin	-	

Save Submit

Withdraw Deny

Medical Panel requests that have NOT been submitted to PERAC can be Withdrawn or Denied at the board level at any time. If the request was already submitted to PERAC, please send letter/notification to remove from PERAC.

# Withdraw/Deny Request Not Submitted to PERAC

ZZTEST PERAC Massachusetts Public Employee Retirement Administration Commission Hello, Chuck Zdziedacz

Back

Disability Transmittal Request

Request Information

Accidental Disability Transmittal Request for:

Social Security #: \*\*\*\*-4386

Disability Transmittal Documents

Forms

Description of Essential Duties

Employer Statement

Letter from Employer Terminating Position

Other Attachments

Board Member Signatures

Disability Transmittal Withdrawal

Board: Zztest PERAC  
Member: Seth Brojeski  
Social Security #: \*\*\*\*-4386  
Application Type: Application for Medical Panel

Withdrawal Letter (please attach)

Please upload the full document

[Add Attachment](#)

Cancel Submit

Complete Attachments

ZZTEST PERAC Massachusetts Public Employee Retirement Administration Commission Hello, Chuck Zdziedacz Sign Out

Back

Disability Transmittal Request

COMPLETE: This Disability Transmittal was canceled on 11/30/2017 at 8:43 AM by Chuck Zdziedacz

Request Information

Accidental Disability Transmittal Request for:

Social Security #: \*\*\*\*-4386 Member: Seth Brojeski

Disability Transmittal Documents

History link

Forms	Assigned	Complete	Attachments
Description of Essential Duties	Disability Admin	⊖	
Employer Statement	Disability Admin	⊖	
Letter from Employer Terminating Position	Disability Admin	⊖	
Other Attachments			

A Withdrawal or Denial letter has to be attached. PERAC receives the letter for review, forms that have been completed and or attached will be discarded. Once the letter has been submitted, a complete banner will appear verifying the submission has been cancelled.

# Withdraw/Deny Request Not Submitted to PERAC

**ZZTEST PERAC** Massachusetts Public Employee Retirement Administration Commission Hello, Chuck Zztestadm Sign Out

Panel Request Involuntary Panel Request Disability Transmittal

+ Member Medical Panel Requests

+ Member Disability Transmittals

+ Member CME Reviews

+ Member g1A Status: 2016

**Note Additional processing lines**

- Withdrawal/Denial

Member Name ▲	Process	Cancellation Type	Date	Acknowledgement Date
Aaron Rodgers	Medical Panel	Withdraw	11/29/2017	11/29/2017
Coburn Jules	Medical Panel	Withdraw	10/13/2017	10/13/2017
Karen rowe	Medical Panel	Withdraw	11/29/2017	
Seth Brojeski	Disability Transmittal	Withdraw	11/30/2017	
Sharman Shyama	Medical Panel	Withdraw	10/11/2017	10/11/2017
Test Ordinary	Disability Transmittal	Withdraw	10/13/2017	10/13/2017

Once the Withdraw or Deny has been submitted, the member will move from the Medical Panel Request section to the Withdraw/Denial section. Once PERAC has acknowledged the Withdraw or Deny, the date will display in the Acknowledgement Date column.

# Withdraw/Deny Request Submitted to PERAC

ZZTEST PERAC

Massachusetts Public Employee Retirement Administration Commission

Hello, Chuck Zztestadm

Sign Out

Home

Compliance

Disability

Documents

+ Member Medical Panel Requests

+ Member Disability Transmittals

+ Member CME Reviews

+ Member g1A Status: 2016

- Withdrawal/Denial

Member Name	Process	Cancellation Type	Date	Acknowledgement Date
Sharma Shyama	Medical Panel	Withdraw	10/11/2017	10/11/2017
Stacy Anderson	Disability Transmittal	Withdraw	11/30/2017	11/30/2017
Test Ordinary	Disability Transmittal	Withdraw	10/13/2017	10/13/2017
TestDT Deny	Disability Transmittal	Deny	10/11/2017	10/23/2017
TestDT Withdraw	Disability Transmittal	Withdraw	10/11/2017	
Traves Wilfred	Medical Panel	Withdraw	10/20/2017	10/20/2017

Once PERAC receives and processes the Withdraw letter, the member will move from the Disability Transmittal section to the Withdrawal/Denial section.

# Scheduled Appointment

**BOSTON** Massachusetts Public Employee Retirement Administration Commission Hello, Michael Sign Out

**Disability Home**

Start Medical Panel Request Start Involuntary Panel Request Start Disability Transmittal

**Member Medical Panel Requests**

Member Name	Request Date	Department	Status
Ruben	12/12/2016		
Kevin	7/19/2017		
Madelyn	3/23/2017	Boston School Department	Appointment Confirmed
David	4/24/2018	Parks and Recreation Department	Appointment Confirmed
Roy	7/17/2017	Public Works Department	Appointment Confirmed
Christine	6/19/2017	Boston Fire Department	Appointment Confirmed
Kenna	5/23/2018	Boston School Department	Appointment Confirmed

**Appointments & Certificates**

Date	Time	Vendor	Doctor(s)	Specialty	Location	Certificate
6/29/2018	1:30 PM	Thomas Sciascia, M.D.	Michele Masi Melvyn Lurie Thomas Sciascia	Neurology/Neuro Surgery Neurology/Neuro Surgery Psychiatric	Cambridge, MA	

**You will see the action on the Home page as a NotificationStatus change on Process Line and Apt. details in the Member Screen**

**For member appointments that have been scheduled, the dates and times can be seen in the member information.**



# Certificate Results

**You will see the action on the Home page as a Notification Status change on Process line And Certificate on Apt. details in the Member Screen**

**BOSTON** Massachusetts Public Employee Retirement Administration Commission

Home  
Compliance  
Disability

Disability Application ✓  
Employer's Statement ✓  
Treating Physician's Statement ✓  
Physician List ✓  
Medical Records ✓  
Official Job Description ✓

Appointments & Certificates

Date	Time	Vendor	Doctor(s)	Specialty	Location	Certificate
						<a href="#">View</a>

**Regional Medical Panel Certificate & Narrative** [History](#)

Certificate 1  
Narrative 1

Additional Information (optional)

Close

Did the medical panel receive and review medical records identified on the transmittal of background information to a regional medical panel form prior to rendering a medical opinion in this case?  
☒ Yes ☐ No

Please list any records not listed on the transmittal of background information to a regional medical panel form, which the panel reviewed.

Is the member mentally or physically incapable of performing the essential duties of his or her job as described in the current job description?  
☒ Yes ☐ No

Is said incapacity likely to be permanent?  
☒ Yes ☐ No

Was there a dissenting opinion?  
☐ Yes ☒ No

Certificate Results can be viewed by selecting the member from the list then clicking on the 'View' link. A pop-up with the information will appear along with the paper forms. Selecting the paper icons will open the saved forms in a new tab.