



USER GUIDE | **Disability: Medical Panel Requests**

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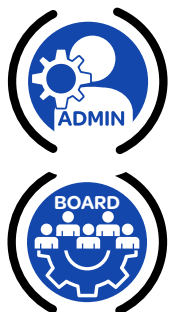
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(1) Overview



In This Section

- ✓ 1.1 Home Page
- ✓ 1.2 Tabs
- ✓ 1.3 Tasks
- ✓ 1.4 Notifications

1.1 Home Page

The Home page contains 3 sections:

1. Application tabs, such as **Tasks**, **Disability**, and **91A** are on the far left
2. **Tasks** and **Notifications** are found in the second section
 - © Log into PROSPER often to check for updates. Updates happen in real time and only show for 90 days.
3. The large central window contains an enlarged view of the application tab that is currently selected. In this instance, the **Task Overview** window is shown.

Figure 1.1.1: The Home Screen

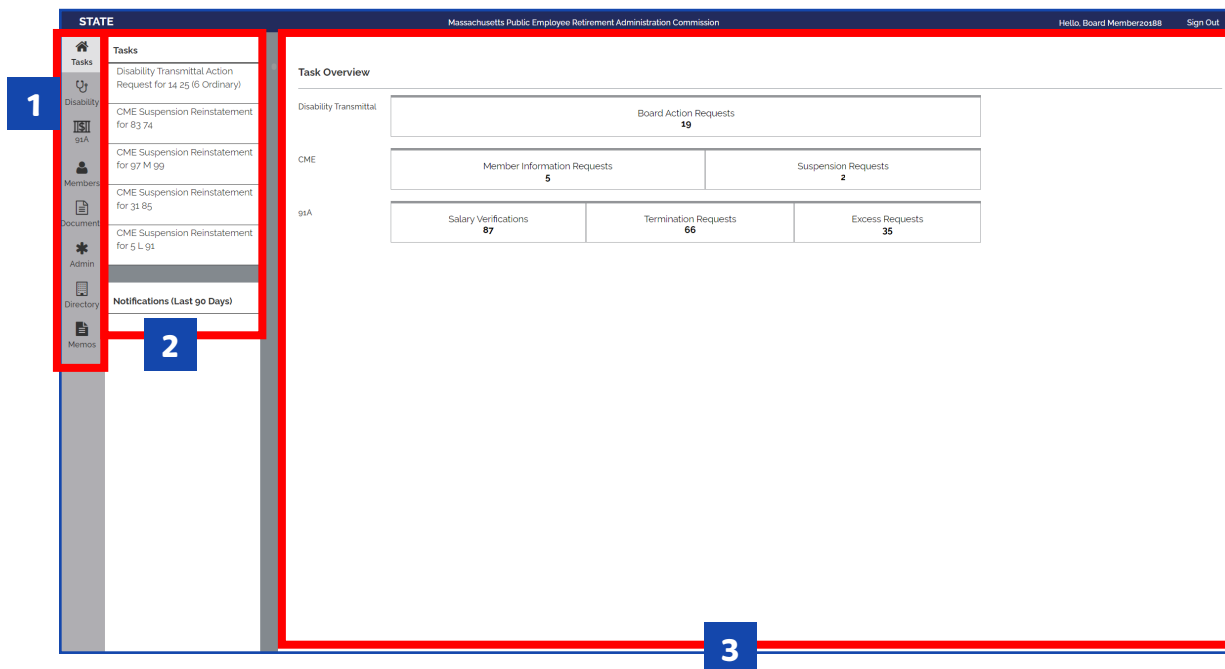
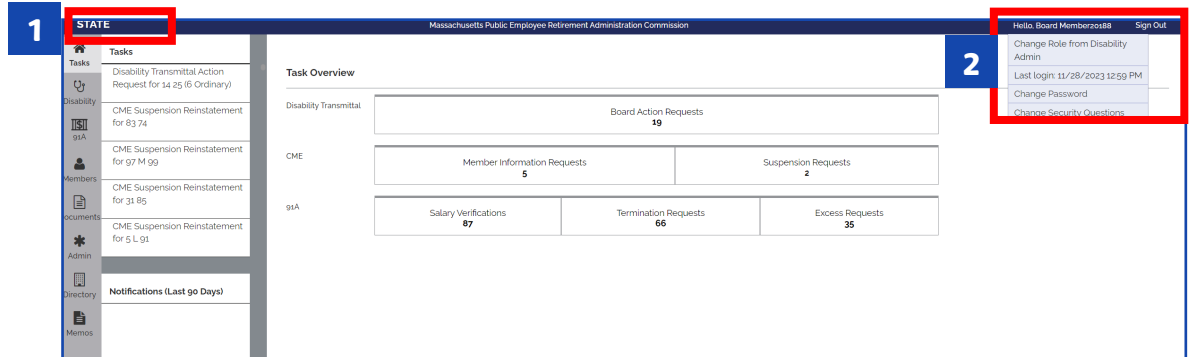


Figure 1.1.2: Home Screen Board Name and Greeting



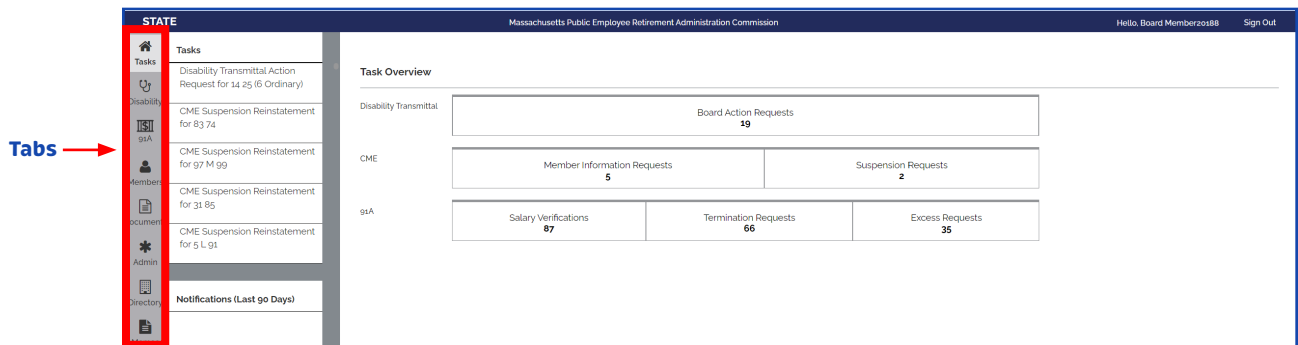
1. The **Board Name** will reflect your board (STATE used here for demonstration purposes only).
2. The **Greeting** (in this example, “BoardMember20188”) will contain your name; hovering over the greeting will display options such as change your password and change security questions.

1.2 Tabs

Choosing a tab from the **Tabs** section will open that specific application and will show each of the processes that are available to you. Once a tab is selected, it will bring you to a different work section and the active section will be highlighted.

Administrators will have permission to access different tabs depending on their user access.

Figure 1.2.1: Tabs



1.3 Tasks

Tasks are items that need some action to be taken. Clicking on a specific task will bring you to that task.

Figure 1.3.1: Task Section on the Home Page

Disability Transmittal	Board Action Requests 19		
CME	Member Information Requests 5	Suspension Requests 2	
91A	Salary Verifications 87	Termination Requests 66	Excess Requests 35

- **Tasks** will be visible on the home page until it is completed. Most Board Member Tasks involve Compliance. Disability Tasks for Board members involve approval or denial of disability applications.

Figure 1.3.2: Select the Task For Information on Actions Needed

Information on the action that needs to be taken for the Task selected appears here

Member Information Request for 60 4

Current Information Form

Name of Retirement Board
State

SSN Member Last Name* Member First Name* M.I. Suffix
***-**-8515 4 60

Foreign Address ☐

Street Address* Street Address 2 City* State* Zip*
50 St Braintree MA 02184

Phone #* Email
(781) 626-3884 60.4@test.test

Date of Birth Date of Hire Job Title Date of Retirement
3/27/1984 Trooper 6/21/2022

CME Exception?
☐

Employer Name (current)* Employer Title (current)*
State Police Headquarters State Police

Employer Phone Type Employer Phone* Employment From Employment To
Work (508) 820-2555

Current Position Occupation Supervisor Name
Trooper Shawn Givhan, Director of H

Employer Street Address (current) City State Zip
470 Worcester Road Frammingham MA 01702

If this member is now deceased, please contact PERAC

Submit

- **Tasks** contain detailed information on the action that needs to be taken.

1.4 Notifications

Notifications are items that are *primarily informational*, but may need action by you or another Board Member.

Figure 1.4.1: Notifications Screen

Notifications (Last 90 Days)

- 11/8/2023 Disability Transmittal Complete
- 11/8/2023 Disability Transmittal Needs More Information
- 11/8/2023 Medical Panel Results
- 11/8/2023 Appointment Confirmed

Task Overview

Disability Transmittal	Board Action Requests 19		
CME	Member Information Requests 5	Suspension Requests 2	
91A	Salary Verifications 87	Termination Requests 66	Excess Requests 35

► **Notifications** show for 90 days only.

Figure 1.4.2: Selecting Notifications

Select a Notification

Notifications (Last 90 Days)

- 11/8/2023 Disability Transmittal Complete
- 11/8/2023 Disability Transmittal Needs More Information
- 11/8/2023 Medical Panel Results
- 11/8/2023 Appointment Confirmed
- 11/5/2023 Disability Transmittal Board Action Request is Late
- 11/3/2023 Medical Panel Results

Dear Board G Member20294,

An appointment on 12/12/2025 at 3:07 PM for AutoMPR McTest3000 has been confirmed with Nabil Basta, Steven Silver, Ryan Friedberg.

► Selecting a **Notification** will display the full Notification.

Most information regarding medical panel exams, reports etc. will be sent to the board via the **Notifications** tab. You will no longer receive letters regarding medical panel appointments. Notices will be sent via PROSPER NOTIFICATIONS. Any cancellations and completed Certificate and narrative notifications will appear here as well.

When you open the Notification, you will view the details of the notification. Most of the actions in the Disability process will be in the form of **Notifications**, such as:

- Appointment notices
- Cancellations
- Certificate receipts



NOTE: Notifications only remain visible for 90 days, then they fall off. LOG IN TO PROSPER TO KEEP TRACK!

Email and Notifications

You will not receive e-mails for all processing; check PROSPER daily.

- Medical Panel Request Under Review
- Appointment Scheduled/Confirmed/Cancelled
- Medical Panel Results
- Withdrawal/Deny Acknowledgement

Figure 1.4.3: Sample Notification with Link to View Certificate

Massachusetts Public Employee Retirement Administration Commission

Hello, Board G Member2024 Sign Out

Tasks

- Accidental)
- Disability Transmittal Action Request for 41 61 (7 Accidental)
- Disability Transmittal Action Request for 35 A 25 (7 Accidental)
- Disability Transmittal Action Request for 22 15 (7 Accidental)
- Disability Transmittal Action Request for 9 93 (7 Accidental)
- Disability Transmittal Action Request for 14 25 (7 Accidental)

Notifications (Last 90 Days)

- 11/8/2023 Disability Transmittal Complete
- 11/8/2023 Disability Transmittal Needs More Information
- 11/8/2023 Medical Panel Results
- 11/8/2023 Appointment Confirmed

Please be advised that PERAC has completed its review of the following medical panel Certificate(s) and found the Certificate(s) to be in order:

AutoMPR McTest3000

Your retirement board is encouraged to review the attached report(s) to determine if it is completed to your satisfaction

If upon review of the enclosed report, your board determines that additional information or clarification is required, the board may submit to PERAC in writing, a request which identifies the additional information which is desired. The board's request will then be forwarded by this office to the physicians.

If you should have any questions regarding the enclosed material, please do not hesitate to contact this office.

[Click to view certificate](#)

Sample Notification with link to view Certificate

Figure 1.4.4: Sample Notification E-mail

perac-mailing@per.state.ma.us

to me

4:53 PM (18 hours ago)

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+Lynn's+Way,+Plymouth,+MA+02360/123+Test+ave,+testville,+MA+11111/amc>

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.

➤ You will not receive e-mails for all processing - check PROSPER daily.

(2) Medical Panel Request Process



In This Section

- ✓ 2.1 Disability Home Page
- ✓ 2.2 Medical Panel Request Overview / Home Page
- ✓ 2.3 Creating a Medical Panel Request
- ✓ 2.4 Status of Medical Panel Request

2.1 Disability Home Page

From the Disability Home Page, the Board Member can review documentation on active and completed Disabilities.

Figure 2.1.1: The Disability Home Page

The Disability Home page is set up in 2 sections:

1. The top 3 boxes will start a process (**Medical Panel Request, Involuntary Panel Request or Transmittal**)
2. The horizontal blue lines underneath contain Cases, History and Information for Medical Panel Requests (as well Disability Transmittals and 91A Status). Current active cases can be opened to view ongoing cases. Once the member has completed the Disability process, the file contents will move over to History.
 - Click the **History** link on the right side of the box. Depending on the size the board, these lists can become extensive. The History link can help to sort through completed cases.

2.2 Medical Panel Request Overview / Home Page

A list of all cases in the Medical Panel Request process for your board will populate.

Figure 2.2.1: Medical Panel Requests Home Page

Disability Home

First Name: Last Name:

Start Medical Panel Request Start Involuntary Panel Request Start Transmittal

Member Medical Panel Requests History

Member Name	Request Date	Disability Type	Employer	Current Status	Doctor(s)
2 M 1	4/8/2017	Voluntary Ordinary Disability	Department of Probation	Certificate Reviewed	Michael Kahn
18 15	2/15/2019	Voluntary Ordinary Disability	Massachusetts Trial Court	Request Not Submitted	
45 B 17	2/21/2023	Voluntary Accidental Disability No Pre.	Mass Department of Transp.	Pending Scheduling	B. Eugene E Brady, Marc Linson
4 2	12/27/2018	Voluntary Accidental Disability No Pre.	Department of Corrections	Request Not Submitted	
4 2	12/27/2018	Voluntary Accidental Disability No Pre.	Department of Corrections	Pending Scheduling	Robert W Ferrell

+ Member Disability Transmittals History

- The cases listed will provide the Member Name, Date of Panel Request, the Disability Type, the Employer, Current Status and the names of the Doctor(s).

Figure 2.2.2: Viewing a Medical Panel Request

Board members are able to view a disability application throughout the Medical Panel process.

Medical Panel Request

Request Information

Member Name: 2 M 1
Social Security #: 123-456789
Application Date: 4/8/2017
Panel Type: Single
Disability Type: Voluntary Ordinary Disability
Appointment Type: Standard Appointment
Board: State
Medical Condition: Psychiatric OOD
Doctor(s): Michael Kahn, MD

Status Information

Request Submitted: 5/30/2018
Request Under Review: 6/15/2018
Pending Scheduling: 6/15/2018
Scheduling Hold:
Appointment Scheduled: 7/3/2018
Appointment Confirmed:
Appointment Complete:
Results Distributed:

Forms

Form	Complete	Attachments
Disability Application	✓	1
Employer's Statement	✓	1
Treating Physician's Statement	✓	1
Physician List	✓	
Medical Records	✓	2
PERAC Approval Letter from PERAC (for additional Medical Panel)	✓	1
Official Job Description	✓	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: Vilmont Suffix:
☒ I acknowledge that I am electronically signing this form

Appointments & Certificates

Date	Time	Vendor	Doctor(s)	Specialty	Location	Certificate	Addendums
7/20/2018	8:00 AM	Kahn, MD	Michael Kahn, MD	Psychiatric	Boston, MA	View	

[Click Here to View/Print Certificates & Narratives](#)

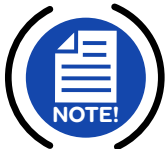
- Upon opening a Medical Panel Request page, the **Request Information**, **Status Information** and **Forms** fields will appear.

1. **Request Information** - including Information from the member application, such as member demographic data and case detail.
2. **Status Information** - includes status of the request and dates of the various processes.
3. **Forms** - includes submitted application documents sent to PERAC. When appointments are scheduled, this page will update to reflect appointment dates. When certificate/narratives are completed, they will be available here as well.

PROSPER Medical Panel Request 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

The boards can use PROSPER to assist in managing their cases however it best suits them. Once you begin inputting the information, the board can **Save**, **Cancel** or **Submit**. Information can be input as it is received, or the case can be compiled and then input.



NOTE: NOTHING IS TRANSMITTED TO PERAC UNTIL THE BOARD CHOOSES TO SUBMIT.

2.3 Creating a Medical Panel Request

Voluntary and involuntary panel requests are separate processes. These buttons will only be enabled for Administrators. Board members and chairs will not be able to start this process.

Figure 2.3.1: Starting a Voluntary or Involuntary Medical Panel Request

The screenshot shows the 'Disability Home' page. At the top, there are three buttons: 'Start Medical Panel Request', 'Start Involuntary Panel Request', and 'Start Transmittal'. The 'Start Medical Panel Request' button is highlighted with a red box, and a blue callout with the number '1' points to it. Below the buttons are several menu items: 'Member Medical Panel Requests', 'Member Disability Transmittals', 'Member CME Reviews', 'Withdrawal/Denial', 'Rejected', and 'Approved Disability Transmittals without Retirement Date'. Each menu item has a 'History' link on the right.

1. Selecting either of these buttons will open the member information page to enter the member information.

Figure 2.3.2: Entering Member Information

The screenshot shows the 'Medical Panel Request' form. It is divided into two main sections. The top section, 'Disability Information', contains checkboxes for 'Check if this panel request is for an accidental death only' and 'Choose all that apply' (with options for 'Ordinary Disability' and 'Accidental Disability'). A red box highlights the 'Accidental Disability' option, with a blue callout '1' pointing to it. The bottom section, 'Member Contact Information', contains fields for 'Social Security #', 'Member Last Name', 'Member First Name', 'M.I.', and 'Suffix'. A red box highlights the 'Social Security #' field, with a blue callout '2' pointing to it. Below this, there is a section for 'Application Date' and a section for 'This member has claimed total incapacity based on the following medical conditions'. A red box highlights the 'Body Part' and 'Injury' dropdown menus, with a blue callout '3' pointing to them. A 'Submit' button is at the bottom right.

1. Presumptions will appear in the drop down if you choose **Accidental Disability**.
2. Important to verify **Social Security Number** before entering! You must complete ALL fields to Save the information.
3. Enter **Body Part** and describe details of the **Injury** and Diagnosis (from Treating Physician's Statement).



NOTE: You must complete all fields. Court Decisions must be attached, if applicable.

Once all questions are completed, a **Form Checklist** will be created based upon the information that was entered. Here is an example of the required forms for each type of application.

Figure 2.3.3: Required Forms Lists for Disability Applications

Voluntary Disability Application

	Ordinary Disability	Accidental Disability - No Presumption	Voluntary Accidental Disability - Heart	Accidental Disability - Lung	Accidental Disability - Cancer
Disability Application	R	R	R	R	R
Employer's Statement	R	R	R	R	R
Treating Physician's Statement	R	R	R	R	R
Physician List	R	R	R	R	R
Medical Records	R	R	R	R	R
Injury Report		R			
Involuntary Retirement Application					
Official Job Description	R	R	R	R	R
Other Documents					
Pre-Employment Physical			R	R	R
Appeals / Court Decisions	R (If "Is this request to an Appeal or Court Decision" is YES)				
Veterans Status					
Death Certificate					
Previous Disability Certificate					
Previous Disability Narrative					

Involuntary Disability Application

	Ordinary Disability	Accidental Disability - No Presumption	Involuntary Accidental Disability - Heart	Accidental Disability - Lung	Accidental Disability - Cancer
Disability Application					
Employer's Statement	R	R	R	R	R
Treating Physician's Statement					
Physician List	R	R	R	R	R
Medical Records	R	R	R	R	R
Injury Report		R			
Involuntary Retirement Application	R	R	R	R	R
Official Job Description	R	R	R	R	R
Other Documents					
Pre-Employment Physical			R	R	R
Appeals / Court Decisions	R (If "Is this request to an Appeal or Court Decision" is YES)				
Veterans Status					
Death Certificate					
Previous Disability Certificate					
Previous Disability Narrative					

Death Disability Application

	Survivor Benefit	Death Posthumous Panel - Presumption	Posthumous Panel - No Presumption
Disability Application	R	R	R
Employer's Statement		R	R
Treating Physician's Statement		R	R
Physician List		R	R
Medical Records	R	R	R
Injury Report			R
Involuntary Retirement Application			
Official Job Description	R	R	R
Other Documents			
Pre-Employment Physical	R	R	
Appeals / Court Decisions			
Veterans Status			
Death Certificate	R	R	R
Previous Disability Certificate	O		
Previous Disability Narrative	O		

Figure 2.3.4: Required Forms Checklist

Forms	Assigned	Complete	Attachments
Disability Application	Board Member20088	⊖	
Employer's Statement	Board Member20088	⊖	
Treating Physician's Statement	Board Member20088	⊖	
Physician List	Board Member20088	⊖	
Medical Records	Board Member20088	⊖	
Injury Report	Board Member20088	⊖	
Official Job Description	Board Member20088	⊖	

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

Figure 2.3.5: Sample Form

- Click on any of the forms and another window will pop-up (in this case, Employer's Statement). Make sure to scroll down in all of the pop-up boxes to complete ALL fields and answer ALL questions. Each section will need to be completed by the Administrator.
- Click the **Add Attachment** link to add the relevant form; the form must be a pdf document.

Medical Records

Medical Records are extremely important for record keeping at both the Board and at PERAC. These records will be referred to numerous times in this process and possibly in the future if there is any Restoration to Service processing after retirement. Taking time to do this correctly at the beginning will save a lot of time in the long run.

Boards should try to scan these documents in pdf format as they are received by the facility. When ready to upload, the board will have them as they received them.

How Should the Files Be Named?

Some suggestions on information to include in the file names:

- By Facility/physician
- Include Date Range (last 5 years of medical records)

Medical Records file naming convention suggestions:

- Facility(physician) 2015-2017 part 1
- Facility(physician) 2015-2017 part 2

Examples:

- ◎ 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

Who Reviews This Information?

This information is being reviewed by:

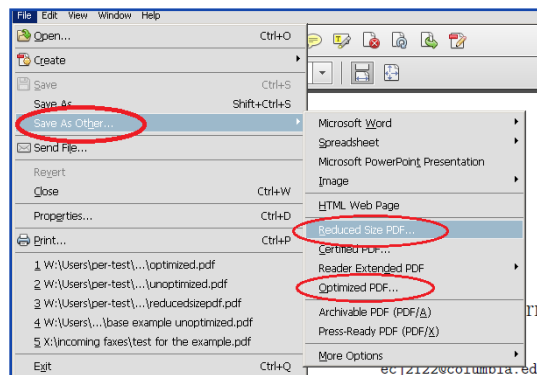
- physicians (during the panel process)
- retirement board members (at their meetings regarding the application)
- any board attorney (through the process)
- the legal dept (at PERAC during the transmittal)
- nurse case managers during CME and RTS (and possibly physicians throughout the CME/RTS process)



NOTE: Maximum file size when attaching files in PROSPER is <15MB (approx. 200 pages)

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.

Figure 2.3.6: Physician List (1)

Physician
List

 A screenshot of the 'Medical Panel Request' form in the PERAC system. The form is divided into several sections: 'Request Information', 'Status Information', 'Forms', and 'Assigned'. The 'Physician List' section is highlighted with a red box. A red arrow points from the 'Physician List' label on the left to this section. The 'Physician List' section contains a table with columns for 'Physician Name', 'Board Member', 'Complete', and 'Attachments'. The table lists several physicians, including 'Board Member2018', 'Board Member2019', and 'Board Member2020'. The 'Complete' column has red circles with minus signs, and the 'Attachments' column has red circles with plus signs.

- Please provide a complete list of all physicians to avoid having to re-schedule panels. Include previous medical panel doctors and Workers Compensation doctors.

Figure 2.3.6: Physician List (2)

Massachusetts Public Employee Retirement Administration Commission

Hello, Board Member20188 Sign Out

Physician List

Board: State
Member: 35 C 3
Social Security #: ***-**-6129
Application Type: Application for Accidental Disability

First Name* MI Last Name* Suffix
Specialty*

Clear Add

First Name	MI	Last Name	Suffix	Specialty
Elizabeth		Dupuis		Internal Primary Physician

Cancel Submit

Medical Panel Request

Request Information

Member Name: 35 C 3
Social Security #: ***-**-6129
Application Date: 9/16/2020
Panel Type: Single
Disability Type: Voluntary
Accidental Disability
No Presumption
Appointment Type: Standard Appointment
Board: State
Medical Condition: Arm Trauma/Injury

Forms

Form	Disability Admin	Complete	Attachments
Disability Application	Disability Admin	✓	1
Employer's Statement	Disability Admin	✓	1
Treating Physician's Statement	Disability Admin	✓	1
Physician List	Disability Admin	✗	1
Medical Records	Disability Admin	✓	8

- Clicking on the **Physician List** shows brings up a dialog box to add the physician(s) information

Figure 2.3.7: Error Messages

ERROR Message

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 sfdgsd
Social Security #: ***-**-5634
Application Type: Application for Ordinary Disability

Employer's Statement Form (please attach) *

Please upload the employer statement form.

Add Attachment

- This error pop-up window indicates that some fields were incomplete.

Figure 2.3.8: Ready to Submit Medical Panel Request

Massachusetts Public Employee Retirement Administration Commission

Hello, Board Member20188 Sign Out

Member Name: 76 20
Social Security #: ***-**-7420
Application Date: 9/18/2017
Panel Type: Single
Disability Type: Voluntary
Accidental Disability
No Presumption
Appointment Type: Standard Appointment
Board: State
Medical Condition: Hand
Carpel Tunnel Syndrome

Request Submitted:
Request Under Review:
Pending Scheduling:
Scheduling Hold:
Appointment Scheduled:
Appointment Confirmed:
Appointment Complete:
Results Distributed:

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

Cancel **1** Submit

1. Once all forms are **Complete** and ALL documents have been attached, the request can be submitted by hitting the **Submit** button. (The request remains only with the board until Submit has been selected) .

Figure 2.3.9: Administrator's Electronic Signature

Massachusetts Public Employee Retirement Administration Commission

Sign Out

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	✓	1
Medical Records	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 * Board MI D Last Name * Admin1 Suffix

The electronic signature must match the name Board D Admin1.

☒ I acknowledge that I am electronically signing this form *

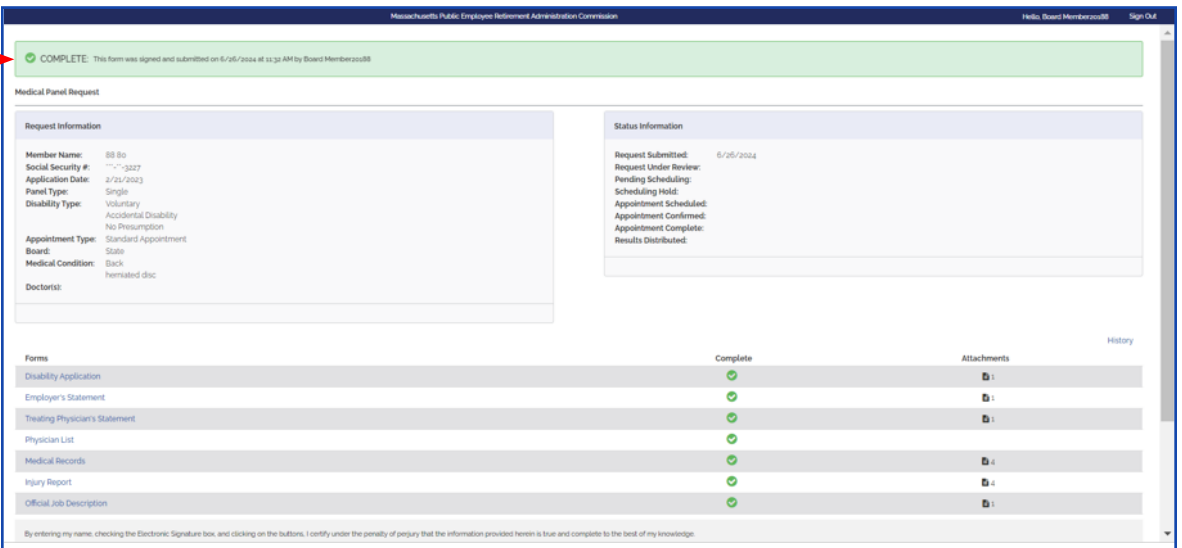
1

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

1. 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 records once the request has been submitted to PERAC.

Figure 2.3.10: Medical Panel Request COMPLETE

Request COMPLETE



Request Information

Member Name: 88 88
 Social Security #: 111-11-1111
 Application Date: 2/25/2023
 Panel Type: Single
 Disability Type: Voluntary
 Appointment Type: No Presumption
 Board: Standard Appointment
 Medical Condition: State
 Doctor(s): Back
 herniated disc

Status Information

Request Submitted: 6/25/2024
 Request Under Review:
 Pending Scheduling:
 Scheduling Held:
 Appointment Scheduled:
 Appointment Confirmed:
 Appointment Complete:
 Results Distributed:

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

- Once the request has been submitted to PERAC a **Green COMPLETE** banner will appear to confirm. Once submitted, additional documents (such as additional medicals) cannot be added and no changes can be made.
- Any changes after submission may result in withdrawing of initial request and creating a new request with correct information.

2.4 Status of Medical Panel Requests

Medical Panel Request Under Review

If PERAC needs more information or there are missing fields or forms that need correction, PERAC can put the request under review. A notification with the specifics on what information is needed will appear on the board page. Updated information can be uploaded to resubmit.



NOTE: An example of this could include a treating physicians statement that does not support the application.

Figure 2.4.1: Under Review

1 ALERT: • Request Throwing on 11/18/2023 at 4:30 AM
Your Medical Panel Request for Thomas Tucci has been put Under Review. The following questions were asked: Must have a pre-employment physical or a physical exam from an MD right after he was hired.

2 Medical Panel Request

Request Information	Status Information
Member Name: 3374 Social Security #: 12-12-12 Application Date: 8/1/2023 Panel Type: Single Disability Type: Voluntary Accidental Disability Heart Presumption Appointment Type: Standard Appointment Board: State Medical Condition: Heart hypertension	Request Submitted: 11/15/2023 Request Under Review: 11/17/2023 Pending Scheduling: Scheduling Hold: Appointment Scheduled: Appointment Confirmed: Appointment Complete: Results Distributed:

Forms	Assigned	Complete	Attachments
Disability Application	Disability Admin	⊖	📎
Employer's Statement	Disability Admin	⊖	📎
Treating Physician's Statement	Disability Admin	⊖	📎
Physician List	Disability Admin	⊖	📎
Medical Records	Disability Admin	⊖	📎
Pre-Employment Physical	Disability Admin	⊖	📎
Official Job Description	Disability Admin	⊖	📎

Submit

1. You will receive a notification on your home page.
2. Go to Member list and open the case

Medical Panel Requests - Cancel/Submit

Medical Panel requests that have NOT been submitted to PERAC can be **Canceled** at the board level AT ANY TIME. If the request was already submitted to PERAC, please send letter/notification to remove from PERAC.

Figure 2.4.2: Cancel Medical Panel Request

Massachusetts Public Employee Retirement Administration Commission Hello, Board Member20188 Sign Out

Trauma/Injury

History

Forms	Assigned	Complete	Attachments
Disability Application	Board Member20188	⊖	
Employer's Statement	Board Member20188	⊖	
Treating Physician's Statement	Board Member20188	⊖	
Physician List	Board Member20188	⊖	
Medical Records	Board Member20188	⊖	
Injury Report	Board Member20188	⊖	
Official Job Description	Board Member20188	⊖	

Cancel Submit

- Click on the **Cancel** button to Cancel a Medical Panel Request

Figure 2.4.3: Medical Panel Cancellation Screen

The figure consists of two side-by-side screenshots of the 'Medical Panel Cancellation' dialog box. Both screenshots show the following fields: Board: State, Member: 123 Testing, Social Security #: ***-**-6789, and Application Type: Application for Medical Panel. The left screenshot, labeled with a blue '1' in a box, shows the 'Reason' dropdown menu open with three options: 'Withdrawn', 'Denied', and 'Data Entry Error'. A 'Yes' button is visible next to the dropdown. The right screenshot, labeled with a blue '2' in a box, shows the 'Reason' dropdown set to 'Withdrawn'. Below it is a section titled 'Withdrawal Letter (please attach)' with a text area containing the placeholder 'Please upload the full document' and an 'Add Attachment' button. At the bottom of the right screenshot are 'Cancel' and 'Yes' buttons.

1. After clicking **Cancel**, Select **Withdrawn**, **Deny** or **Data Entry Error** from the drop-down box.
2. For **Withdrawn** or **Denied**, a letter has to be attached. Once PERAC receives the letter for review (in PDF format), forms that have been completed and or attached will be discarded.

Figure 2.4.4: Medical Panel Request Canceled Complete Screen

The figure is a screenshot of the 'Medical Panel Request Canceled Complete' screen. At the top, a green banner with a checkmark icon and the text 'COMPLETE: This Medical Panel was canceled on 6/27/2024 at 10:25 AM by Board Member20188' is highlighted with a red box and labeled with a blue '3' in a box. Below the banner, the screen is divided into two main sections: 'Request Information' and 'Status Information'.

Request Information	Status Information
Member Name: 68 70	Request Submitted:
Social Security #: ***-**-2456	Request Under Review:
Application Date: 5/8/2024	Pending Scheduling:
Panel Type:	Scheduling Hold:
Disability Type: Voluntary	Appointment Scheduled:
Appointment Type: Standard Appointment	Appointment Confirmed:
Board: State	Appointment Complete:
Medical Condition: Brain	Results Distributed:
Cancer	

3. Once the letter has been submitted, a **Green COMPLETE** banner will appear verifying the submission has been cancelled.

Figure 2.4.5: Withdrawal/Denial Section

Massachusetts Public Employee Retirement Administration Commission Sign Out

Panel Request Involuntary Panel Request Disability Transmittal

+ Member Medical Panel Requests

+ Member Disability Transmittals

+ Member CME Reviews

+ Member g1A Status: 2016

4 - Withdrawal/Denial

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

- Once the Withdraw/Deny has been submitted, the member will move from the **Medical Panel Request** section to the **Withdrawal/Denial** section.

Figure 2.4.6: Acknowledgement Date of Withdrawal/Denial

Massachusetts Public Employee Retirement Administration Commission 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
Sharman	Medical Panel	Withdraw	10/11/2017	10/11/2017
Stacy	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

5

- Once PERAC acknowledges the Withdrawal or Denial, the date will display in the **Acknowledgement Date** column.

Clarifications

If a board seeks clarification from the medical panel after receiving medical panel reports, a **Clarification Request** may be submitted through Prosper. There is no official PERAC form for this request. The board should submit the request in the form of questions to the medical panel and should be concise as possible.

Figure 2.4.7: Accessing Clarification Requests

Massachusetts Public Employee Retirement Administration Commission

Hello, Board G Member20294 Sign Out

Disability Home

First Name: Last Name:

Start Medical Panel Request Start Involuntary Panel Request Start Transmittal

1 + Member Medical Panel Requests History

+ Member Disability Transmittals History

+ Member CME Reviews History

+ Withdrawal/Denial History

+ Rejected History

+ Approved Disability Transmittals without Retirement Date

1. Expand **Medical Panel Requests** by clicking on the “+” symbol to the left of the section. Find the member name in the list.



NOTE: If you have already uploaded a Clarification for a doctor, you will now see an extra entry for the member with Clarification listed to the right of the doctor(s) column. **DO NOT USE THIS ENTRY.** You will need to find the original Medical Panel for the member, and in some cases, you will need to click **History** on the right hand side to see if it was created more than 90 days ago.

Figure 2.4.8: Request Clarification Link

Massachusetts Public Employee Retirement Administration Commission						Hello, Board Member20188	Sign Out
Disability Home						First Name: <input type="text"/>	Last Name: <input type="text"/>
Medical Panel Request History							
Member Name	Request Date	Disability Type	Employer	Current Status	Doctor(s)		
65 1	10/26/2017	Voluntary Accidental Disability No Presumption	Upper Blackstone WPAD	Results Distributed	John Golberg; Marc Linson; Thomas Goss	2	Request Clarification
60 S 1	12/4/2018	Voluntary Accidental Disability No Pre..	Worcester County Sheriff's D..	Results Distributed	Douglas G Bentley; Henry Drinker; John Golberg		
32 1	2/4/2020	Voluntary Accidental Disability No Pre..	Department of Mental Health	Results Distributed	Henry Drinker; Nabil Basta; Ryan P Friedberg		

Massachusetts Public Employee Retirement Administration Commission

Clarification Request

Would you like to submit clarification?

No Yes

First Name:

Disability Type:

Employer:

Current Status:

Doctor(s):

Madhusadan Thakur

- Once you have found the appropriate entry for the member, you will see a clickable link button labeled **Request Clarification** to the right of the Doctor(s) column. This will not be visible until you hover over this column with your mouse. Click **Request Clarification**.
- A **Clarification Request** Pop-up asks you to verify; click **YES**.

Figure 2.4.9: Clarification Medical Panel Request Information Screen

Massachusetts Public Employee Retirement Administration Commission

Hello, Board Member20188

Sign Out

Clarification Medical Panel Request

4

Request Information	Status Information
<p>Member Name: 97 0</p> <p>Social Security #: ***-**-8115</p> <p>Application Date: 4/28/2017</p> <p>Panel Type: Joint</p> <p>Disability Type: Voluntary Accidental Disability Heart Presumption</p> <p>Appointment Type: Standard Appointment</p> <p>Board: State</p> <p>Medical Condition: Heart Ventricular fibrillation status post defibrillator placement. Cardiac arrest.</p>	<p>Request Submitted:</p> <p>Request Under Review:</p> <p>Results Distributed:</p>

5

Forms	Doctor(s)	Assigned	Complete	Attachments	History
Clarification		Disability Admin	<input type="checkbox"/>		

Cancel Submit

- You will be brought to the **Clarification Medical Panel Request** page.
- Click **Clarification** in the list of Forms.

Figure 2.4.10: Clarification Request Additional Information Pop-Up

Clarification Request

Board: State

Member: 98 G o

Social Security #: ***-**-7323

Application Type: Application for Accidental Disability

Doctor: * [6]

Please select a doctor from the list below. That is **only related to this physician!** If multiple doctors have been added will clear them from the cards

B. Eugene E Brady, M. D.
John Golberg, M.D.
Richard N Warnock, M.D.

Clarification Request* (Please Attach)

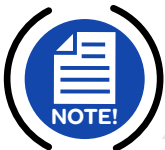
No attachments uploaded.

[7] Save

Cancel

[8] Submit

6. An **Additional Information** pop-up box will appear and a list of doctors. Select the appropriate doctor from the list that this clarification request pertains to.
7. Attach appropriate Clarification file and any additional medical documents and hit **Save**.
8. Hit **Submit** when done.



NOTE: Repeat steps above for specific clarification requests for other doctors. As you add the Clarifications, you will see new entries appear in the “Member Medical Panel Requests” page with “Clarification” listed to the right of the “Doctors(s)” column.



IMPORTANT: If you have 3 Clarification Requests for a member, you should have 3 separate Clarification Requests. Each physician must have its own cover letter.

(3) Medical Panel Request - Board Member View



In This Section

- ✓ 3.1 Viewing Disability Medical Panel Information
- ✓ 3.2 Contact Information

3.1 Viewing Disability & Medical Panel Activity

Disability Tasks for Board members involve approval or denial of disability applications. From the Disability Home Page, the Board Member can review documentation on active and completed Disabilities.

Figure 3.1.1: Viewing Disability Documentation

Massachusetts Public Employee Retirement Administration Commission

Hello, Board Member20188 Sign Out

Disability Home

First Name: Last Name:

Start Medical Panel Request Start Involuntary Panel Request Start Transmittal

1 **+ Member Medical Panel Requests** **2** **History**

Member Name	Request Date	Disability Type	Employer	Current Status	Doctor(s)
2 M 1	4/8/2017	Voluntary Ordinary Disability	Department of Probation	Certificate Reviewed	Michael Kahn
32 S 12	1/16/2020	Voluntary Accidental Disability No ...		Request Not Submitted	
78 F 13	8/3/2021	Voluntary Accidental Disability No ...	Pilgrim Area Collaborative	Request Not Submitted	
48 14	6/19/2019	Involuntary		Request Not Submitted	
18 15	2/15/2019	Voluntary Ordinary Disability	Massachusetts Trial Court	Request Not Submitted	
45 B 17	2/21/2023	Voluntary Accidental Disability No ...	Mass Department of Trans..	Pending Scheduling	B. Eugene E Brady; Marc Linson

1. Click on the **+ Member Medical Panel Requests** to bring present current cases along with their Status

2. Cases that have completed activity are available in **History**

Board members are able to view a disability application throughout the medical panel process.

Figure 3.1.2: Viewing Disability Application

Massachusetts Public Employee Retirement Administration Commission
Hello, Board Member20188
Sign Out

Medical Panel Request

Request Information

1

Member Name: 55 E 75
Social Security #: ***-**-4954
Application Date: 3/27/2017
Panel Type: Joint
Disability Type: Voluntary
Ordinary Disability
Appointment Type: Standard Appointment
Board: State
Medical Condition: Body
Cancer
Doctor(s): Eric H Awtry, M.D
Madhusadan Thakur, M.D
George J Philippides, M.D

Status Information

2

Request Submitted: 11/17/2018
Request Under Review:
Pending Scheduling: 12/3/2018
Scheduling Hold:
Appointment Scheduled: 12/3/2018
Appointment Confirmed:
Appointment Complete: 12/20/2018
Results Distributed:

Forms

3

Forms	Complete	Attachments
Disability Application	✓	1
Employer's Statement	✓	1
Treating Physician's Statement	✓	1
Physician List	✓	
Medical Records	✓	2
Official Job Description	✓	1

History

1. Application Information
2. Status Information
3. Submitted Application Documents

Scheduled Appointments

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

Figure 3.1.3: Scheduled Appointments

Date	Time	Vendor	Doctor(s)	Specialty	Location	Certificate	Addendums
7/16/2024	11:00 AM	Scope Medical, LLC.	Maitri Patel, M. D.	Psychiatric	Newton, MA		
6/19/2024	11:00 AM	Melvyn Lurie, M.D.	Melvyn Lurie, M.D.	Psychiatric	Waltham, MA		
6/14/2024	11:30 AM	Scope Medical, LLC.	Michael Braverman, M.D.	Psychiatric	Cambridge, MA		

➤ A Notification Status change will appear on the Process line of the Home page.

Certificate Results

View **Certificate** Results by selecting the member from the list then clicking on the **View** link. A pop-up with information will appear along with the paper forms.

Figure 3.1.4: View of Completed Certificate

Date	Time	Vendor	Doctor(s)	Specialty	Location	Certificate	Addendums
10/23/2020	10:30 AM	GME	Douglas G Bentley, M.D.	Orthopedic	Taunton, MA	View	
10/17/2020	9:30 AM	GME	Wojciech Bulczynski, M.D.	Orthopedic	Taunton, MA	View	
10/9/2020	10:00 AM	GME	John Goldberg, M.D.	Orthopedic	Taunton, MA	View	

1. Click **View** to see the Certificate and Narrative

Figure 3.1.5: Viewing Certificate and Narrative Detail

The screenshot shows the 'Medical Panel Request' form in the PERAC PROSPER system. The form includes sections for 'Medical Panel Request' (Disability Type, Appointment Type, Board, Medical Condition), 'Forms' (Disability Application, Employer's Statement, Treating Physician's Statement, Physician List, Medical Records, Official Job Description), and 'Appointments & Certificates'. A 'Certificate' pop-up window is open, showing a form with questions about medical panel review and a section for 'Regional Medical Panel Certificate & Narrative' with links for 'Certificate' and 'Narrative'. A red box highlights the 'Certificate' link, and a red arrow points to the 'View' button in the 'Appointments & Certificates' table.

Date	Time	Vendor	Doctor(s)	Specialty	Location	Certificate
4/25/2018	1:00 PM	Awtry, M.D.	Robert Ellison Madhusadan Thakur Eric Awtry	Cardiology Cardiology Cardiology	Boston, MA	View

- From the **Certificate** pop-up window, you can open the Regional Medical Panel Certificate and Narrative documents.

3.2 Contact Information

- ⦿ **Help Desk**

617-591-8983 or 617-666-4446 Ext. 983
PER-ProsperHelp@mass.gov

- ⦿ **Disability Help**

To Reach a Case Manager 617-591-8956

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COMMONWEALTH OF MASSACHUSETTS

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