



Disability Retirement Application Checklist

Members with at least five years of TRSL service credit may apply for disability retirement. To apply for disability retirement, submit a completed *Application for Disability Retirement* (Form 12). You may cancel your application for disability retirement prior to the effective date or prior to cashing or depositing any retirement check. It is the applicant's responsibility to ensure that all required documents are submitted to TRSL.

What you need to do (write your Social Security number on each document and keep a copy for your file):

- Complete Sections 1, 2, 3, 4, 5, and 6 of the *Application for Disability Retirement* (Form 12).
- Attach medical documentation:
 - *Disability Report by Supervisor* (Form 12A)
 - *Member's Statement of Disabling Condition* (Form 12B)
 - *Physician's Report of Disabling Condition* (Form 12C or 12C-P) should be completed for every doctor listed on Form 12B in Section 2, #4, and every referral doctor listed on every Form 12C or 12C-P.
- Attach copies of any additional medical records supporting the disability claim.
- Attach copy of your job description or job standards.
- Attach copies of Social Security cards, as issued by the Social Security Administration, birth certificates for you, your spouse, each minor or other eligible children, all named beneficiaries, and death certificate of spouse (if applicable). Your estimated benefits will not be processed until we receive a copy of your card.
- Attach certified copies of divorce papers and community property settlement papers, if applicable.
- Have employer certify all questionable years and sick leave used via the online update processes
- Contact other state retirement system if you have a reciprocal agreement.

What you need to do if you are approved by the State Medical Disability Board:

- Submit a completed *Authorization for Direct Deposit* (Form 15D) directly to TRSL. (Your first check is sent to your mailing address.)
- Submit a completed W4-P federal withholding form directly to TRSL.
- Items to discuss with employer: resignation, insurance deductions, payment of unused leave

What your employer needs to do:

After your employment ends, your employer will need to submit the following:

- Agency Certification* (Form 11B), after termination
- Certification of Annual Leave, if applicable — to be submitted online at any time
- Certification of Questionable Years — to be submitted online at any time
- Certification of Sick Leave — to be submitted online at any time

Additional forms that may be needed:

Additional forms to be completed and attached to *Application for Disability Retirement* (Form 12), if applicable:

- Student Attendance Certification* (Form 13C), if applicable, to receive additional benefit for having a minor child
- Notification of Workers' Compensation benefits from Workers' Compensation provider. Louisiana Revised Statute 11:221 mandates the offset of disability benefits for persons receiving Workers' Compensation benefits.

Check TRSL's website at www.trsl.org for latest versions of all forms.

Date-of-birth verification documents on reverse side.

Date-of-Birth Verification Documents

(03/08)

Verification of your date of birth, as well as that of your spouse and/or beneficiary, is required as part of your application for disability retirement.

The best evidence is either:

- 1) A birth certificate or hospital birth record established during the first few years of life and certified by the custodian of the record, or
- 2) A church baptismal record established during the first few years of life that shows the date of birth.

If you do not have either of these records in your possession, try to obtain one. If a church record was made of your birth or baptism, it is probably still on file at the church. If you cannot obtain one of the documents listed above, furnish at least two of the documents listed below. Try to obtain a record that was established early in life. Additional evidence of age may be requested if the documents you submit are not sufficient.

- 1) A school record of enrollment in two different schools on dates at least five years apart should be acceptable as two different records. Records must be signed by the principal of the school or superintendent of schools. Records are not acceptable if signed by a teacher.
- 2) A state or federal census record (established near your date of birth)
- 3) A statement showing the date of birth signed by the physician or midwife who was in attendance at the birth
- 4) A notarized copy of the birth entry in a family Bible
- 5) An insurance policy that shows age or date of birth
- 6) Marriage record that shows age at the time of marriage and the year it took place. This record must be at least 20 years old.
- 7) A passport
- 8) Certified military service record
- 9) A child's birth certificate that shows age of parent(s)
- 10) A record from the Social Security Office verifying date of birth
- 11) Any dated legal document, at least 20 years old, that gives the individual's age or date of birth. Acceptance is subject to approval of the Board of Trustees of the Teachers' Retirement System of Louisiana.

In addition to the documents listed above, the following documents, for those born in a foreign country, may be submitted:

- 1) A foreign passport
- 2) An immigration record established upon arrival in the United States
- 3) A naturalization record (citizenship paper)
- 4) An alien registration card