CALSTRS

Appeals Committee

Item number 3 – Open session

Subject: Consideration of the Proposed Decision: In the Matter of the Rejection of the Disability Benefits Application Submitted By: Matthew Mattison

Presenter(s): James M. Lindsay; Ian Coen

Item type: Action

Date and time: November 3, 2026 – 20 minutes

Attachment(s): Attachment 1 – Proposed Decision

PowerPoint presentation(s): None

Item Purpose

The purpose of this item is to consider the proposed decision issued in the above-referenced matter.

Executive Summary

Senior Administrative Law Judge (ALJ) Jennifer M. Russell received evidence at an administrative hearing on August 24, 2026, for the above-referenced matter. Both CalSTRS and Respondent Matthew Mattison, through their respective counsel, submitted closing argument at the close of the August 24, 2026, hearing, after which the record closed, and the matter was submitted for decision.

On September 23, 2026, ALJ Russell delivered the proposed decision denying Mr. Mattison's appeal, and affirmed CalSTRS' determination that Mr. Mattison's disability benefits application must be denied on the grounds that 1) it is untimely pursuant to Education Code section 24102, subdivision (a)(2); 2) it is not properly supported by competent medical documentation pursuant to Education Code sections 24103 and 22450; and 3) Mr. Mattison does not meet the definition of "disabled" pursuant to Education Code section 22126. (Attachment 1.)

Mr. Mattison and his attorney were given an opportunity to submit a written statement in response to the proposed decision, but did not submit one.

Staff recommends that the Appeals Committee adopt the proposed decision with the technical or other minor changes identified below.

Background

Matthew Mattison became a CalSTRS member on October 11, 1998. He worked intermittently as a substitute teacher and later became a full-time special education teacher with the Los Angeles Unified School District ("LAUSD") in the 2006-2007 school year. Mr. Mattison requested and received a leave of absence from his position with LAUSD on or about March 27, 2014, for the stated purpose of providing care for his mother. His last day of actual performance of service was March 28, 2014. Shortly after receiving the leave of absence, Mr. Mattison resigned from his employment with LAUSD, effective April 11, 2014.

Mr. Mattison actively sought medical consultation and treatment from 2009 to 2012 for acid reflux disease, cough, asthma, shortness of breath, and vocal cord dysfunction. None of the medical records pertaining to visits during this time placed Mr. Mattison on disability, required work restrictions, or described any functional limitations affecting his ability to perform his duties as a special education teacher. Mr. Mattison was employed full-time throughout this stretch of medical treatment and received satisfactory performance reviews. There is no documentation in Mr. Mattison's LAUSD personnel file indicating any personal health issue affecting his performance as a special education teacher. Mr. Mattison communicated with CalSTRS on the effective date of his resignation, April 11, 2014. At no point in that communication did Mr. Mattison state that he had any health issues affecting his ability to perform his job duties.

Mr. Mattison submitted his *Disability Benefits Application* ("Application") on August 26, 2019, identifying the specific impairments of acid induced vocal cord dysfunction and laryngopharyngeal reflux. Upon receipt of the Application, CalSTRS staff contacted Mr. Mattison via telephone and sent confirming correspondence indicating that, because the Application was submitted five years and five months after his last date of actual performance of service, he would have to establish that he had been continuously physically or mentally incapacitated for performance of service pursuant to Education Code section 24102, subdivision (a)(2). He was specifically requested to provide, among other things, his employment records and all medical records from 2013 to the present. While Mr. Mattison did provide his LAUSD personnel file and medical records pertaining to treatment from 2009 through 2012 and 2018 through 2019, he did not provide any documents pertaining to any medical treatment for the years 2013 through 2017.

The records pertaining to visits in 2018 and 2019 also fail to specifically place Mr. Mattison on disability, require any work restrictions, or discuss any functional limitations establishing an inability to perform the duties of a special education teacher. A one-page unsigned letter from Sun Yoo, M.D., dated November 7, 2019, was submitted in which Dr. Yoo indicated that she had been Mr. Mattison's primary care physician since March 2019, that she had been treating him, along with other specialists for conditions that had been disabling since March 2014 and that there were records to establish the continuous nature of his condition. The only medical records she referenced, however, were from 2009. The letter did not reference CalSTRS or any statute relating to disability under the Teachers' Retirement Law and indicated that she did not know the prognosis other than his treatment had only recently started and that he would need to be reevaluated in about six months.

Following the internal administrative remedy process wherein CalSTRS denied Mr. Mattison's Application, he timely requested an administrative hearing. Upon receiving the administrative

hearing request, CalSTRS sent Mr. Mattison to an independent medical examination with Scott T. Anderson, M.D., Ph.D., a board-certified internist, rheumatologist, and geriatrician. Dr. Anderson reviewed the entirety of the medical documentation submitted by Mr. Mattison to CalSTRS, performed a physical examination, and authored a report and supplemental report concluding that Mr. Mattison was not continuously disabled as defined in Education Code section 22126 and, in fact, did not meet the definition of "disabled" at any time including the time of the examination on April 24, 2024.

At the hearing, Mr. Mattison submitted the same medical documentation produced during the Application and administrative review process. He testified to his alleged impairments and claimed that his condition dramatically affected his ability to perform his duties as early as 2008 even forcing him to leave his classroom and take a nap during instruction time but that his classroom aides covered for him. He testified that, although his leave of absence request specifically referenced his need to care for his mother, he also believed his own health conditions were preventing him from being able to perform his duties as a special education teacher. Mr. Mattison acknowledged on cross-examination that he was never placed on disability by a physician, never provided work restrictions and that no physical limitations were discussed relating to inability to perform his job duties. He also acknowledged that his official personnel file contains no references to his inability to perform his duties and that every formal review provided satisfactory performance marks. He testified that he attempted to return to his job in 2017 but was denied.

ALJ Russell found that none of the medical documentation submitted established that Mr. Mattison was continuously disabled from the last day of performance of service, March 28, 2014, through the date of his Application, August 26, 2019, or that he met the definition of "disabled" at any time. ALJ Russell found that the evidence supported that he resigned from his employment with LAUSD in order to care for his mother and not because he was unable to perform his job duties. ALJ Russell found that the letter prepared by Dr. Yoo was not competent medical documentation to support continuous disability or disability at all under Education Code section 22126. ALJ Russell found that Dr. Anderson's reports were competent medical documentation to establish that Mr. Mattison was not continuously disabled or disabled at any time pursuant to Education Code section 22126.

ALJ Russell ruled that Mr. Mattison had the burden of proof to establish his right to disability benefits by a preponderance of the evidence, and that he failed to establish his right to a disability benefit and sustained each of the three causes for denial asserted by CalSTRS: 1) Mr. Mattison's Application was not timely pursuant to Education Code section 24102, subdivision (a)(2); Mr. Mattison failed to provide competent medical documentation as required by Education Code sections 24103 and 22450 and that, therefore, the Application cannot be approved pursuant to Education Code section 24103, subdivision (g); and 3) Mr. Mattison does not meet the definition of "disabled" pursuant to Education Code section 22126.

ALJ Russell also concluded that Mr. Mattison was not entitled to relief pursuant to Education Code section 22308, relating to correction of errors or omissions, because doing so would grant Mr. Mattison a retirement benefit to which he is not entitled since his Application was not supported by competent medical documentation, and he does not meet the definition of disabled.

Accordingly, ALJ Russell denied Mr. Mattison's appeal and affirmed CalSTRS' rejection of Mr. Mattison's Application.

Recommendations

Pursuant to Government Code section 11517, subdivision (c)(2)(C), staff recommends that the Appeals Committee adopt the proposed decision with the following technical or other minor changes:

1. On page 3, paragraph 7, line 1, change "February 17." to "February 17,."
2. On page 3, paragraph 7, line 2, delete the word "committee."
3. On page 3, paragraph 8, line 1, insert a space after "12,."
4. On page 5, paragraph 19, line 1, change "LAUSD s" to "LAUSD a."
5. On page 7, paragraph 27, line 3, change "Yoo;s" to "Yoo's."
6. On page 8, paragraph 28, line 2, delete the word "since."
7. On page 8, paragraph 29, line 2, insert an open quotation mark before the word "did."
8. On page 9, paragraph 30, line 6, insert the word "report" after "(IME)."
9. On page 10, paragraph 31, line 2, change "cords" to "vocal cords."
10. On page 10, paragraph 32, lines 3 and 4, change "18" to "28."
11. On page 12, paragraph 1, line 1, change single open quotation mark to double open quotation mark, from "'disability"" to ""disability"."
12. On page 13, paragraph 2 (continued), line 5, change "or" to "of."
13. On page 13, paragraph 4, lines 1-2, change "CalSTRS board" to "Teachers' Retirement Board."
14. On page 18, paragraph 12 (continued), line 1, delete the word "in."
15. On page 18, paragraph 14, line 2, change "15" to "13."

Strategic Plan Linkage: Goal 1 (trusted stewards) to ensure a well-governed, financially sound trust fund

Board Policy Linkage: Section 7.C. Guidelines for Consideration of Proposed Decisions in Appeals

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