

Disability Management Documentation Process

This guide has been developed to assist administrative staff to understand the documentation and reporting requirements for the various sorts of leaves that are dealt with by Disability Management.

All documents referred to in the guide can be found on the internal Southern Health HPS portal under Human Resources/Workplace Safety and Health.

Any questions regarding the information contained in this guide can be directed to the Workplace Safety & Health email address at wsh@southernhealth.ca.

Special Considerations:

- Manitoba Nurses Union (MNU) is required to be at the first RTW meeting for all of their members. After the first meeting it is at the employee and union rep's discretion.

WCB PROCESS (No Time Loss)

<i>Step</i>	<i>Action Items</i>
Step 1	Employee completes a Safety Event Report for all injuries or near misses occurring in the workplace.
Step 2	Manager or designate determines if the employee has sought medical attention on or after the date of injury.
Step 2 (a)	If no , the manager or designate emails Section C (page 4) to Workplace Safety & Health (WS&H) at wsh@southernhealth.ca and indicates no time lost and no medical sought . WS&H records the information, files the report and closes the file.
Step 2 (b)	If yes , The manager or designate emails Section C (page 4) to WS&H and their designated payroll contact. If medical documentation has already been received, the manager or designate can include that in the email. Otherwise, they can indicate in the email that the employee has sought medical attention and that the medical documentation will be forwarded once it arrives. An initial File Summary Form (FSF) should also be completed and sent at this time. WS&H records the information, files the documentation, and notifies the appropriate Disability Case Coordinator (DCC) of the new claim.
Step 3	Any medical documentation received should be sent to WS&H for the file.
Step 3 (a)	The medical provider indicates that the employee can continue to do the full duties and hours of their position. The File Summary Form is updated/signed off by manager and is sent to WS&H along with the clearance medical. The file is closed and archived.
Step 3 (b)	The medical provider indicates that the employee requires modified duties during recovery from their injury. The manager contacts the DCC to discuss the initial return to work (RTW) meeting. The manager also sends the information to WS&H for the file.
Step 4	The DCC, manager, employee, and union representation (at employee's request) meet to review the medical provided and develop a return to work (RTW) plan for the employee based on the medical restrictions provided. The RTW Schedule is sent in to WS&H and Payroll after the meeting.
Step 5	During their RTW Program, the employee completes the Employee Weekly Reports and provides them to their manager at the end of each week. These reports are sent to WS&H for the file.
Step 6	Depending on the length and/or severity of the restrictions, updated medical may be provided by the employee, by the Workers Compensation Board (WCB), or requested by the DCC and manager. Each time updated medical is received a meeting will be held and an updated RTW schedule will be created. Each time new medical is received and an updated schedule is created, they will need to be sent to WS&H for the file.
Step 7	The employee receives medical clearance to return to the full duties of their position. The File Summary Form is updated/signed off by manager and is sent to WS&H along with the clearance medical. The file is closed and archived.

WCB PROCESS (Time Loss)

<i>Step</i>	<i>Action Items</i>
Step 1	Employee completes an Safety Event Report for all injuries or near misses occurring in the workplace.
Step 2	Manager or designate determines if the employee has sought medical attention or has missed time at work after the date of injury.
Step 2 (a)	If no , the manager or designate emails Section C (page 4) to Workplace Safety & Health (WS&H) at wsh@southernhealth.ca and indicates no time lost. WS&H records the information, files the report and closes the file.
Step 2 (b)	If yes , the manager or designate emails Section C (page 4) to WS&H and their designated payroll contact. If medical documentation has already been received, the manager or designate can include that in the email. Otherwise, they can indicate in the email that the employee has lost time beyond the date of injury. (The employer has to pay regular hours for the day of injury, as if the employee was in the workplace even if they leave early.) An initial File summary Form (FSF) should also be completed and sent at this time. WS&H records the information, files the documentation, and notifies the appropriate Disability Case Coordinator (DCC) of the new claim.
Step 3	Any medical documentation received should be sent to WS&H for the file. This includes medical notes that extend the employee's time away from the workplace.
Step 3 (a)	The medical provider indicates that the employee can return to the full duties and hours of their position. The File Summary Form is updated/signed off by manager and is sent to WS&H along with the clearance medical. The file is closed and archived.
Step 3 (b)	The medical provider indicates that the employee can return to work but requires modified duties, reduced hours, or both during recovery from their injury. The manager contacts the DCC to discuss the initial return to work (RTW) meeting. The manager also sends the information to WS&H for the file.
Step 4	The DCC, manager, employee, and union representation (at employee's request) meet to review the medical provided and develop a return to work (RTW) plan for the employee based on the medical restrictions provided. The RTW Schedule is sent in to WS&H and Payroll after the meeting.
Step 5	During their RTW Program, the employee completes the Employee Weekly Reports and provides them to their manager at the end of each week. These reports are sent to WS&H for the file.
Step 6	Depending on the length and/or severity of the restrictions, updated medical may be provided by the employee, by the Workers Compensation Board (WCB), or requested by the DCC and manager. Each time updated medical is received a meeting will be held and an updated RTW schedule will be created. Each time new medical is received and an updated schedule is created, they will need to be sent to WS&H and to Payroll for the file.
Step 7	The employee receives medical clearance to return to the full duties and hours of their position. The File Summary Form is updated/signed off by manager and is sent to WS&H along with the clearance medical. The file is closed and archived.

MPI PROCESS (No Time Loss)

Step	Action Items
Step 1	If the employee requires modified duties as a result of a Motor Vehicle Accident (MVA) they notify their manager.
Step 2	Manager or designate determines if the MVA happened during working hours.
Step 2 (a)	If it happened because the employee was driving as part of their job duties, the manager or designate contacts the employee to ask them if they will be filing a claim with the Workers Compensation Board (WCB) or with Manitoba Public Insurance (MPI). <i>If the employee chooses WCB, please follow the WCB (No Time Loss) process.</i>
Step 2 (b)	If the employee chooses MPI the manager or designate completes the initial File Summary Form and emails it to Workplace Safety & Health (WS&H). If medical documentation has already been received, the manager or designate can include that in the email. Otherwise, they can indicate in the email that the employee has sought medical attention and that the medical documentation will be forwarded once it arrives. WS&H records the information, files the documentation, and notifies the appropriate Disability Case Coordinator (DCC) of the new claim.
Step 3	Any medical documentation received should be sent to WS&H for the file.
Step 3 (a)	The medical provider indicates that the employee can continue to do the full duties and hours of their position. The File Summary Form is updated/signed off by manager and is sent to WS&H along with the clearance medical. The file is closed and archived.
Step 3 (b)	The medical provider indicates that the employee requires modified duties during recovery from their injury. The manager contacts the DCC to discuss the initial return to work (RTW) meeting. The manager also sends the information to WS&H for the file.
Step 4	The DCC, MPI case representative, manager, employee, and union representation (at employee's request) meet to review the medical provided and develop a return to work (RTW) plan for the employee based on the medical restrictions provided. The RTW Schedule is sent in to WS&H and Payroll after the meeting.
Step 5	During their RTW Program, the employee completes the Employee Weekly Reports and provides them to their manager at the end of each week. The manager sends these reports to WS&H and MPI for their files.
Step 6	Depending on the length and/or severity of the restrictions, updated medical may be provided by the employee, by MPI, or requested by the DCC and manager. Each time updated medical is received a meeting will be held and an updated RTW schedule will be created. Each time new medical is received and an updated schedule is created, they will need to be sent to MPI, WS&H and Payroll for their files.
Step 7	The employee receives medical clearance to return to the full duties and hours of their position. The File Summary Form is updated/signed off by manager and is sent to WS&H along with the clearance medical. The file is closed and archived.

MPI PROCESS (Time Loss)

Step	Action Items
Step 1	If the employee requires time away from work to recover from a Motor Vehicle Accident (MVA), they notify their manager.
Step 2	Manager or designate determines if the MVA happened during working hours.
Step 2 (a)	If it happened because the employee was driving as part of their job duties, the manager or designate contacts the employee to ask them if they will be filing a claim with Workers Compensation Board (WCB) or with Manitoba Public Insurance (MPI). <i>If the employee chooses WCB, please follow the <u>WCB (Time Loss) process.</u></i>
Step 2 (b)	If the employee chooses MPI , The manager or designate completes the initial File Summary Form and emails it to Workplace Safety & Health (WS&H). If medical documentation has already been received, the manager or designate can include that in the email. Otherwise, they can indicate in the email that the employee has sought medical attention and that the medical documentation will be forwarded once it arrives. WS&H records the information, files the documentation, and notifies the appropriate Disability Case Coordinator (DCC) of the new claim.
Step 3	Any medical documentation received should be sent to WS&H for the file.
Step 3 (a)	The medical provider indicates that the employee can return to the full duties and hours of their position. The File Summary Form is updated/signed off by manager and is sent to WS&H along with the clearance medical. The file is closed and archived.
Step 3 (b)	The medical provider indicates that the employee can return to work but requires modified duties, reduced hours, or both during recovery from their injury. The manager contacts the DCC to discuss the initial return to work (RTW) meeting. The manager also sends the information to WS&H for the file.
Step 4	The DCC, MPI case representative, manager, employee, and union representation (at employee's request) meet to review the medical provided and develop a return to work (RTW) plan for the employee based on the medical restrictions provided. The RTW Schedule is sent in to WS&H and Payroll after the meeting.
Step 5	During their RTW Program, the employee completes the Employee Weekly Reports and provides them to their manager at the end of each week. The manager sends these reports to WS&H and MPI for their files.
Step 6	Depending on the length and/or severity of the restrictions, updated medical may be provided by the employee, by MPI, or requested by the DCC and manager. Each time updated medical is received a meeting will be held and an updated RTW schedule will be created. Each time new medical is received and an updated schedule is created, they will need to be sent to MPI, WS&H and Payroll for their files.
Step 7	The employee receives medical clearance to return to the full duties and hours of their position. The File Summary Form is updated/signed off by manager and is sent to WS&H along with the clearance medical. The file is closed and archived.

ACCOMMODATION PROCESS – NO INSURER (No Time Loss)

Step	Action Items
Step 1	If the employee requires modified duties as a result of a medical condition, they notify their manager.
Step 2	The manager or designate completes the initial File Summary Form (FSF) and emails it to Workplace Safety & Health (WS&H). If medical documentation has already been received, the manager or designate can include that in the email. Otherwise, they can indicate in the email that the employee has sought medical attention and that that the medical documentation will be forwarded once it arrives. WS&H records the information, files the documentation, and notifies the appropriate Disability Case Coordinator (DCC) of the new claim.
Step 3	Any medical documentation received should be sent to WS&H for the file.
Step 3 (a)	The medical provider indicates that the employee requires modified duties as a result of their medical condition. The manager contacts the DCC to discuss the initial return to work (RTW) meeting. The manager also sends the information to WS&H for the file.
Step 4	The DCC, manager, employee, and union representation (at employee’s request) meet to review the medical provided and develop a return to work (RTW) plan for the employee based on the medical restrictions provided. The RTW Schedule is sent in to WS&H and Payroll after the meeting.
Step 5	During their RTW Program, the employee completes the Employee Weekly Reports and provides them to their manager at the end of each week. The manager sends these reports to WS&H for the file.
Step 6	Depending on the length and/or severity of the restrictions, updated medical may be provided by the employee, or requested by the DCC and manager. Each time updated medical is received a meeting will be held and an updated RTW schedule will be created. Each time new medical is received and an updated schedule is created, it will need to be sent to WS&H and Payroll for the file.
Step 7	The employee receives medical clearance to return to the full duties and hours of their position. . The File Summary Form is updated/signed off by manager and is sent to WS&H along with the clearance medical. The file is closed and archived.

ACCOMMODATION PROCESS – NO INSURER (Time Loss)

Step	Action Items
Step 1	If the employee requires time away from work as a result of a medical condition, they notify their manager.
Step 2	The manager or designate completes the initial File Summary Form (FSF) and emails it to Workplace Safety & Health (WS&H). If medical documentation has already been received, the manager or designate can include that in the email. Otherwise, they can indicate in the email that the employee has sought medical attention and that the medical documentation will be forwarded once it arrives. WS&H records the information, files the documentation, and notifies the appropriate Disability Case Coordinator (DCC) of the new claim.
Step 3	Any medical documentation received should be sent to WS&H for the file. This includes medical notes that extend the employee’s time away from the workplace.
Step 3 (a)	The medical provider indicates that the employee can return to the full duties and hours of their position. The File Summary Form is updated/signed off by manager and is sent to WS&H along with the clearance medical. The file is closed and archived.
Step 3 (b)	The medical provider indicates that the employee can return to work but requires modified duties, reduced hours, or both during recovery. The manager contacts the DCC to discuss the initial return to work (RTW) meeting. The manager also sends the information to WS&H for the file.
Step 4	The DCC, manager, employee, and union representation (at employee’s request) meet to review the medical provided and develop a return to work (RTW) plan for the employee based on the medical restrictions provided. The RTW Schedule is sent in to WS&H and Payroll after the meeting.
Step 5	During their RTW Program, the employee completes the Employee Weekly Reports and provides them to their manager at the end of each week. The manager sends these reports to WS&H for the file.
Step 6	Depending on the length and/or severity of the restrictions, updated medical may be provided by the employee, or requested by the DCC and manager. Each time updated medical is received a meeting will be held and an updated RTW schedule will be created. Each time new medical is received and an updated schedule is created, they will need to be sent to WS&H and Payroll for the file.
Step 7	The employee receives medical clearance to return to the full duties and hours of their position. The File Summary Form is updated/signed off by manager and is sent to WS&H along with the clearance medical. The file is closed and archived.

Special Considerations:

- For leaves without pay, a general rule of thumb is that WS&H is notified of absence from the workplace when the cumulative time away from work is one pay period or longer in length.