

DISABILITY MANAGEMENT PROCEDURE MANUAL

Table of Contents

	Page
Vision	4
Strategic Priorities	4
Benefits of Disability Management Program	4
Guiding principles.....	5
1.0 Authority	6
1.1 Definitions	6
2.0 Initiating a disability management process	6
2.1 Identification and Initiation.....	6
2.2 Reporting of an injury	7
2.2.1 Workplace Injury: No time loss.....	7
2.2.2 Workplace Injury: Time loss	7
3.0 Disability Management process	7
3.1 Disability Management team.....	7
3.2 Initial meeting.....	7
3.2.1 Communication with employee	8
3.2.2 Ongoing communication	8
3.3 Return to work evaluation & planning.....	9
3.3.1 Graduated Return to Work Implementation.....	9
3.3.2 Implementation review	9
3.4 Complex cases.....	10
3.5 Obtaining medical information.....	10
3.6 Medical form-Functional Capabilities	10
3.7 Employee Assistance Program (EAP).....	10
4.0 Duty to Accommodate Process	11
4.1 Accommodation planning.....	12
4.2 Accommodation options.....	12
4.2.1 Duration of accommodation	13
4.3 Limitations on duty to accommodate.....	13
4.3.1 Undue hardship.....	13
4.3.2 Where return to work/accommodation is not possible..	13
5.0 Roles and Responsibilities.....	14
6.0 Information Sharing and Confidentiality	16
6.1 Information Sharing.....	16
6.2 Confidentiality.....	16

7.0 Tracking, reporting, and assessing return To Work 16
 7.1 Tracking and reporting 16
 7.2 Recording and Assessing RTW/Disability accommodation..... 17
8.0 References 17

Vision:

Ensure employees with injuries are able to remain at work or return to work in an early and safe manner that respects the dignity of the employee, and the results in meaningful and productive work benefiting both the employee and Southern Health-Santé Sud.

Strategic Priorities

Southern Health-Santé Sud's Board Ends outlines strategic priorities that promote and guide our employees through:

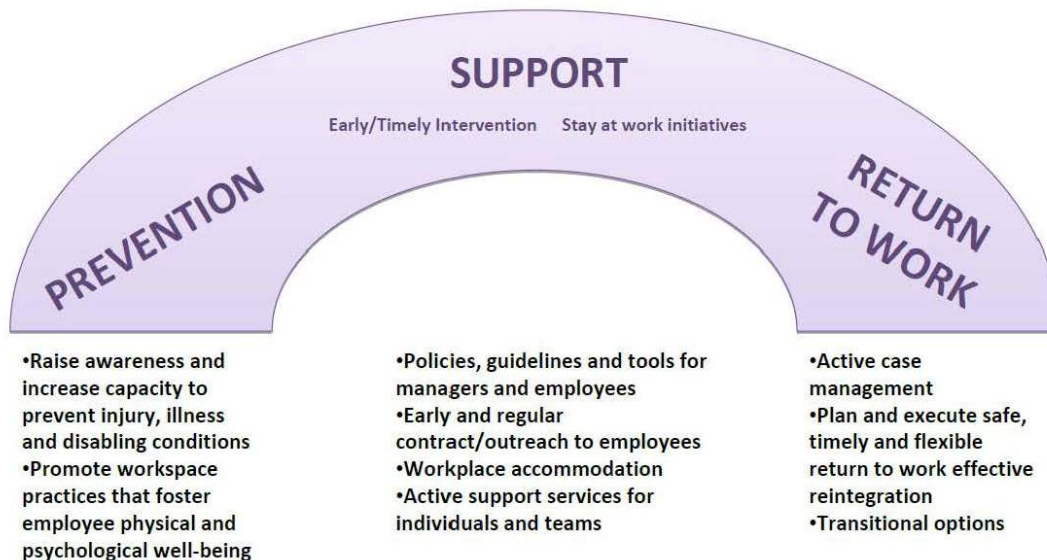
- Creation of safe health care
- Maintaining a skilled, healthy and safe workforce.

The disability management program uses these priorities to support the role of the employer, as well as the responsibility of the individual employees in promoting health and well being.

Benefits of Disability Management Program

Disability management program enables employees with injuries to be productive members of their department and programs throughout Southern Health-Santé Sud. Assisting employees with injuries to stay at work or return to work is a "win-win" situation for all parties involved. The employee benefits through early engagements that supports them in remaining at work or returning to work quickly enhancing their mental, physical, and social well being. The employer benefits by retaining skilled and experienced employees through a reduction in employee turnover, time-loss initiatives, and creating a safer, more cooperative and productive workplace.

Disability Management Process



Guiding Principles

As set out in the Disability Management Process, the Southern Health-Santé Sud Workplace Safety & Health program (WS&H) plays a leadership role by providing expertise and assistance to the sites and programs with respect to the disability management and the accommodation process. Sites/programs in turn are responsible for ensuring that the disability management and accommodation process is handled in a timely, consistent, and effective manner.

The following principles guide the delivery of the disability management, return to work, and accommodation processes in Southern Health-Santé Sud:

- Early intervention to support employees with injuries remain at work or returning to work in a safe manner.
- Shared commitment of all parties to the process of disability management and accommodating programs benefit both employers and employees alike.
- Responsibility of employees to participate actively in the program and its processes, and accept reasonable offers of accommodation when presented.
- Respect for the roles and responsibilities of all individuals involved
- Accountability for actions, behaviors and decisions, and integrity through all parties in the process acting honestly and in good faith, maintaining confidentiality and being reliable (doing what they say they will do).
- Timely, efficient and accurate benefit decision, including disability insurance eligibility and claims administration.

- Monitoring and data collection and analysis to support disability management and accommodation programs.

1.0 Authority

Southern Health-Santé Sud's Disability Management Process sets out obligations and requirements of the region for meeting accommodation needs to its employees with disabilities in accordance to the Manitoba Human Rights Act, The Workers Compensation Act of Manitoba, and collective agreements.

Southern Health-Santé Sud is committed to upholding the duty to accommodate the needs of employees with disabilities in a manner that respects the dignity of each employee.

1.1 Definitions

Graduated Return to Work (GRTW)- The process of gradual re-integration to the workplace through a structured increase of hours or duties of work to improve tolerance

Assistive devices- any material, devices or equipment used to eliminate or reduce the restrictions and limitations caused by an injury.

Job modification- Any change in the structure of duties that makes up a job. This may involve physical changes to the employee's work area/ and or changes in equipment used.

Transitional work program- A temporary accommodation used to facilitate an injured employee's safe transition to previous full employment hours and duties. Transitional work programs may also complement external programs such as physiotherapy or chiropractic treatments as appropriate.

Third party Insurer- Provincial insurers used in healthcare to cover employees that may suffer from workplace accidents.

2.0 Initiating a Disability Management Process

These procedures outline fair and consistent approach to return to work and accommodation processes and responding to tracking requests for disability accommodation, as well as recording and monitoring accommodations.

2.1 Identification and Initiation

Early intervention is critical. Effective disability management processes requires timely response and action. Early identification and open

communication and interaction between the employee, the employee's supervisor and others involved in the return to work process is required.

2.2 Reporting of an injury

In the event of an injury, the employee shall complete the injury report and notify his/her immediate supervisor of the injury as soon as possible or by end of shift. Refer to the Reporting of Injury Procedure flow chart

2.2.1 Workplace Injury: No time loss/ no restrictions capable of full duties

Employee: returns back to the original position.

Supervisor: reviews the injury report and provides any corrective action needed to prevent or control the event from re-occurring. Information is then sent directly to the region's WS&H program and to the department/program manager.

2.2.2 Workplace Injury :Time loss and/or restrictions/limitations requiring medical notification

See above injury reporting procedure. Employee required to obtain medical documentation and contact WCB; supervisor to initiate payroll/benefit process.

3.0 Disability Management process

Disability management is about how the organization responds when an employee requires accommodation assistance to remain at work or return to work. The process includes the coordination of activities related to employee absence, benefit management, return to work planning, and implementation. Refer to Disability management manager/employee checklist.

3.1 Disability Case Management team

The Disability Case Management team is typically composed of the employee's supervisor, the injured employee, Disability Case Coordinator, third party insurer, and union representation. The employee plays an active role being consulted on the management of their case and participating and cooperating in the return to work and accommodation process.

3.2 Return to Work Meeting

A return to work meeting is initiated by the injured employee's medical practitioner's note or through the specific insurer's case managers. The

Manager/Supervisor will request the involvement of Disability Case Coordinator and arrange subsequent meetings with all parties involved.

The purpose of the return to work meeting is to offer and provide support and assistance in a timely and effective manner and support the identification and development of options and solutions to support the employee to manage their condition, including providing needed communications, to stay at work and facilitate an early and safe return to work.

Depending on the case, issues and matters covered in the meeting include:

- A review of the medical note that outlines any restrictions and limitations and graduated hours of work required.
- A consensus from the team on a graduated return to work schedule outlining restrictions and limitations, hours and days of work, and specific duties that can be performed given the restrictions.
- Return to Work Employee weekly report; detailing the activities and abilities both at work and at home.
- Ongoing communication between the team on the progress of the plan
- Employee's ongoing follow-up with physician to address any modifications to the plan.

Once the return to work plan starts, on-going monitoring of the employee progress is essential. A return to work may last approximately 6 weeks, dependant on the injury and the increase of hours over the length of the plan until the employee is back to full duties. Ongoing communication with the employee, supervisor, and physician is key to addressing any difficulties with the plan.

In the event the employee is not progressing, the Disability Case Coordinator may need to request a further medical clarification from the physician in establishing an alternate plan.

3.2.1 Communicating with the Employee

Initiating and maintaining a connection with the employee and their supervisor is essential to an effective disability case management ensuring the employee is either able to stay at work or return to work in an early and safe manner.

3.2.2 Ongoing Communication

Where an employee is going to be away from the workplace for a period of time, arrangements need to be made outlying how the supervisor and employee will stay connected, and determining the

method and frequency of communication that works best for the individual employee and the particular situation.

3.3 Return to Work Evaluation and Planning

Accurate and timely information is required to support case evaluation and planning. All information relevant to the employee's situation and circumstances including his/her job requirements and workplace situation is critical in moving forward to efficiently and effectively plan for the employees with injuries to remain at work or in a return to work capacity.

Identifying, gathering and obtaining the information required from all sources and then considering and assessing that information of the employee's individual circumstances and the workplace requirements, situations and environment is key.

The resources necessary to ensure the efficient and effective management of the case should be pulled in from the onset. As part of the plan's evaluation process, the team members required to support planning and management of the specific case should be identified and brought into the process. In all cases, the employee's immediate supervisor must always be part of the disability management team.

3.3.1 Graduated Return to Work Implementation

The supervisor of the employee who is returning to work in a graduated capacity is critical to ensuring that the return to work or placement is successful. The supervisor facilitates the gradual return to work and supports the employee throughout the process. This includes what and how information about the employee's work participation will be shared in the workplace in order to give the employee a sense of control and comfort in the situation.

Where an employee is returning to work on a graduated basis, contact is required between the immediate Manager/Supervisor and the Payroll and Benefits department. The Payroll & Benefits department ensures the particular forms are completed by the employee and that the employee's pay and benefit provisions are accurately processed.

3.3.2 Implementation review

The employee's supervisor will oversee the implementation of the accommodation through regular observation, communication related to the employee's Return to Work (RTW) plan, and employee's daily/weekly activity log based on the RTW plan based

on the employee's physician's restrictions/limitations over a period of time. The plan can be adjusted by recommendation of the relevant health care provider.

3.4 Complex cases

Some cases will be identified from the outset as "complex" cases requiring extra attention, effort and management. Other cases may become progressively more complex over time as issues are identified or as the case develops. In these cases, the designated Disability Case Coordinator must be involved.

The goal in managing a complex case is to ensure that the necessary steps to address all of the issues involved in the cases are incorporated in order to facilitate effective management and resolution.

3.5 Obtaining Medical Information

Medical information is required to:

- Identify an employees' restrictions and limitations in order to guide the appropriate management of the employee's return to work plan
- Establish the employer's duty to accommodate

3.6 Medical form- Functional Capabilities

As part of the disability management program package, a Functional Capabilities Assessment form has been included as a guide for the employee's health provider to identify the employee's medical restrictions and/ or limitations. Medical is required to support recommended restrictions and limitations of the employee and a copy to be forwarded to their immediate supervisor and a copy to the workplace safety & health program. The designated Disability Case Coordinator will then initiate the process of arranging a meeting with the employee, manager, and union representative to start the initial return to work schedule based on the information provided in the Functional Capabilities Assessment form and the employee's work schedule.

Note: it is the responsibility of the employee for costs associated with the completion of physician's notes based on information supplied from the Functional Capabilities Assessment form.

3.7 Employees Assistance program (EAP)

- The Employee Assistance program (EAP) is a professional counseling and consulting service through Manitoba Blue Cross designed to assist

the employee and their immediate family members to deal with problems that are affecting their workplace and/or personal lives.

- An employee may self refer by contacting EAP service. Employees are responsible to arrange time off with their supervisor to attend the EAP session. A supervisor may also recommend EAP service to an employee; **but** it is up to the employee to make contact with EAP.

4.0 Duty to Accommodate process

The primary objective, where possible, is to maintain the employee's connection to the pre-injury job during the early and safe return to work program. The first priority is to return the employee to the pre-injury job or to modify the pre-injury job. Where the specific functional abilities prevent a return to the pre-injury job, then suitable work that is available consistent with the employee's functional abilities that restores the pre-injury earnings, where possible, must be offered to the employee.

Accommodating employees with disabilities also ensures that the Southern Health-Santé Sud, as an employer, upholds its Duty to Accommodate under the Manitoba Human Rights, Workers Compensation Act of Manitoba, various collective agreements, and disability management procedures.

Return to Work Hierarchy

Southern Health-Santé Sud will make every effort to provide meaningful modified work and will use the following hierarchy as a guideline to return to work plan development:

1. Same job – same employer – no work modifications
2. Same job – same employer – with work modifications
(as determined by medical information)
3. Different job – same employer – no work modifications
4. Different job – same employer – with work modifications
(as determined by medical information)

RESPONSIBILITY OF WORKPLACE ACCOMODATIONS

All individuals involved with the accommodation must co-operate with each other in the return to work process. The Disability Case Coordinator is the primary lead person and is required to:

- work with employee and manager for potential placement.
- maintain appropriate communication throughout the employee's recovery;
- identify and secure return to work opportunities for the employee;

4.1 Accommodation Planning

Where it has been determined that an employee with a disability needs to be accommodated to remain at work or return to work, the supervisor will consult and work with the Disability Case Coordinator in planning a reasonable accommodation and return to work. The goal is to align the employee's medical restrictions and limitations with the operational needs of the job in order to identify possibilities that meet both the employer's and employee's needs and to keep the employee at work, or help return the employees back to work as quickly and safely as possible. The designated Labour Relation Officer (LRO) may also be involved in the accommodation process.

Departments/programs are expected to develop options in accommodation plans that are appropriate, effective, and suitable given the employee's specific needs. Assistance in the development of these plans can be made through the Workplace Safety and Health program by adapting established Physical Demands Analysis (PDA) that reflects the actual departmental/program's workplace environment.

Employees are expected to follow treatment and rehabilitation recommendations by made by their physician as part of the accommodation plan, and accept reasonable offers for accommodation.

4.2 Accommodation Options

Consistent with the region's accommodation procedures, the following accommodation options must be considered:

- a) Implementing changes to the physical work environment, equipment, and/or modifying how and when tasks are performed to enable the employee to remain in their current job position (job modifications)
- b) Modifying/re-bundling the employees' job duties or hours in a manner consistent with his/her individual capabilities in order for the employee to perform the essential tasks of his/her current position (modified duties).
- c) Exploring other available job opportunities within the employee's home department in which he/she would be capable of performing the essential tasks of the position, with or without modifications within their current EFT.
- d) Exploring available job opportunities in other departments or locations in which the employee would be capable of performing the essential tasks of the position, with or without modifications

The employee's home department/program retains responsibility for the employee, including covering the cost of accommodation placement, until the

employee obtains a permanent position or they leave the region's employment.

4.2.1 Duration of accommodation

The duration of accommodation can range from very short term to permanent depending on circumstances and sufficient supporting medical.

Where the employee is returning as an "extra" 6 weeks in duration is seen as a guideline; after which time an appropriate available position would be required. Further investigated on a case by case basis.

4.3 Limitations on duty to accommodate.

4.3.1 Undue Hardship

Southern Health/Santé–Sud's responsibility to make reasonable accommodations to meet the needs of employees' with disabilities will be fulfilled to the point of undue hardship as defined in the Manitoba Human Rights Act.

The criteria for determining undue hardship under the Act include but are not limited to, such factors as:

- a) Financial costs of accommodation
- b) Business efficacy
- c) Safety and health concerns
- d) Interchangeability of employees and facilities
- e) Disruption to collective agreements
- f) Impact on employees and service users
- g) Impact on other protected rights
- h) Benefit of the accommodation

4.3.2 Where Return to Work/ Accommodation is not possible

At times, despite best efforts to provide reasonable accommodation, an employee's identified restrictions and limitations may result in an accommodation not being possible. In these cases, the employee's home department must consult with the designed Disability Case Coordinator, Labour Relations Officer, and union representation in regards to all available options for both employee and the employer. (E.g. medical retirement, termination of employment etc.).

5.0 Roles and Responsibilities

Regional Directors and Directors of Health Services

- Support and provide leadership in the site/program for the disability management procedures/process
- Facilitate as needed, placement of employees within site/program
- Facilitate and authorize placement of employees from other sites/programs.

Employees

- Report injury when it occurs utilizing region's injury reporting form.
- Provide relevant and sufficient medical information
- Participate in treatment programs as appropriate
- Participate in benefit administration and disability management processes
- Maintain contact with supervisor, Disability Case Coordinator, and union representation
- Cooperate in return to work (RTW) and accommodation processes; and accept reasonable offers of accommodation
- Communicate with all parties as required.

Manager/Supervisor

- Review and approve appropriate request for leave forms and forward to payroll/benefits, and Workplace Safety & Health Program.
- Consult with Disability Case Coordinator on stay at work or return to work options, and communicate information to employees
- Maintain contact and relationship with employee
- Assist with completion of required Human Resources and Payroll/Benefits forms as required.
- Maintain contact with Disability Case Coordinator, Payroll/Benefits, and Labour relations as required to assist with benefit administration and disability management processes.
- Active support for return to work and accommodation in arranging/facilitating job modifications, modified duties, and alternative placement.
- Provide support to employees under return to work and accommodation processes.

Payroll and Benefits

- Primary contact with supervisor
- Advice to supervisor and employee
- Provide information on employees benefits (sick, vacation, LTD, etc.)
- Advice to return to work team members (supervisor, employee, and Disability Case Coordinator)
- Make changes to employee's pay based on submitted leave forms and upon the advice from supervisor/and or Disability Case Coordinator.
- Advise employees on their benefit options

- Ensure correct payment of benefits.

Disability Case Coordinator

- Provides information and leadership on disability management and accommodation processes.
- Advise and assist on specific disability management issues particularly return to work and accommodation plan scheduling.
- Participate as a team member in disability management, and potential lead and coordinate disability management in complex return to work/accommodation cases.
- Point of contact for all insurers (WCB, HEB, GWL, EI, MPI)
- Review and discuss medical information received with the supervisor/employee
- Review, consult, and discuss restrictions and limitations with supervisor, employee, Payroll and Benefits, and HR department.
- Identify requirement for accommodation and lead /coordinate development of return to work/accommodation plans.
- Support and advise to supervisor, employee, union representation in return to work/accommodation program

Human Resources department/staffing

- Provide advice and assistance to Disability Case Coordinator on vacancies for alternative placement in other site/programs within the region.
- Provide advice on and support to addressing identified respectful workplace issues.

Workplace Safety and Health program

- Maintain/provide support and resources to Disability Case Coordinator in assessing complex return to work/accommodation cases.
- Maintain shared location for all disability management documents including completed functional ability forms, RTW/accommodation plans information, various departmental forms and templates.

Insurers (WCB, HEB, GWL, EI, MPI)

- Maintain liaison with Disability Case Coordinator on all employee related documentation
- Advise Disability Case Coordinator with as much notice as possible when an employee is capable of returning to work.
- Monitor and review claims; consult with the Disability Case Coordinator as required.
- Provide Southern Health-Santé Sud with claims information as required.

Unions

- Represent members' interest through the application of collective agreement provisions.
- May act as representative or agent of employee

Attending physician

- Examine diagnose and treat ill or injured employees
- Complete necessary forms/reports
- Identify the need for necessary specialist evaluations
- Provide medical advice regarding employee restrictions, limitations and return to work capabilities.
- May provide advice to Disability Case Coordinator as required

6.0 Information Sharing and Confidentiality

6.1 Information Sharing

Information regarding an employee's health and health related absence is subject to personal privacy considerations. Such information is collected, used and disclosed in accordance to the personal health information act (PHIA) and freedom of information and protection and privacy (FIPPA) regulations of Southern Health-Santé Sud policies and procedures.

Information should be shared that is necessary to support disability management, return to work, and/or quality of service only.

- Information should not be shared that is not relevant to the case; where there is a prohibition from sharing, or where the information is not necessary to fulfill operational requirements.

6.2 Confidentiality

To ensure the privacy and confidentiality of the employee's personal information, all medical information other than information on an employee's functional capabilities, restrictions and limitations and prognosis [including medical certificates, medical information provided by a medical practitioner, and results of Independent medical Examinations (IME)] will be retained in the WS&H program office.

7.0 Tracking, reporting, and Assessing Return to Work

7.1 Tracking and reporting

Workplace Safety and Health program shall:

- Tabulate information from WCB and regional injury reports and forward to designated site/program for review and required preventative action (as applicable).

7.2 Recording and Assessing Return to work/ Disability Accommodation

The Workplace Safety and Health program will track and record the results from cases and status of any return to work or disability accommodation (open & closed claims). The disability management program will be assessed on the basis of the following strategies in keeping with Southern Health-Santé Sud Board End statements.

Strategies:

- Create and maintain an active focus on employee absence due to injury, in order to identify early intervention opportunities to reduce the impact of injury and lower WCB costs.
- Build and maintain a workplace culture that ensures a safe and healthy work environment and that supports the role of the employer and individual employee in promoting health and wellbeing enabling employees to remain at work healthy and productive
- Focus on the employee's capacity and be flexible and innovative in providing work accommodations to support employees in periods of injury and to facilitate their return to work.

Performance indicators

- Annual: WCB Claims; Monitoring costs and caseload management.

8.0 References

Yukon Public Service commission- February 24, 2012- Disability Management and Accommodating Employees with Disabilities (Framework):

Workplace Health, Safety and Compensation Commission of Newfoundland and Labrador (WHSCC): Workplace Disability Management: A guide to establishing a program in your workplace

Treasury Board of Canada: ww.tbs.gc.ca: Duty to Accommodate