



HBT POLICY: Responsibility Matrix Rehabilitation Services A-1.3

Policy Number OC-11-21-v1

Policy Statement:

This purpose of this policy is to assign and clarify Stakeholder responsibilities for managing Employee workplace absences that may result in Long Term Disability (LTD) claims.

Guidelines

1. Employee workplace absences that may result in LTD claims have assigned Stakeholder responsibility

Definitions

- **Case Management (Mgmt) Plan** – Documented activities to address barriers to return to work for Employees that includes milestones and expected outcomes in coordination with any other agencies involved
- **Employee** – Employees of HBT's member employers who are covered by the HBT LTD Plan (plus the HSA LTD Trusts)
- **Intake** – see Intake Assessment Policy A-3.1
- **Rehabilitation**
 1. **Medical Rehabilitation** – Treatment designed to facilitate recovery from injury, illness, or disease and to restore sufficient physical, sensory, and mental functions to enable Gainful Employment. Treatment also includes assisting the Employee to compensate for deficits that cannot be reversed medically.
 2. **Vocational Rehabilitation** – Services offered to enable Employees with mental or physical disabilities to attain skills, resources, attitudes, and expectations needed to achieve Gainful Employment. Services offered may include skills enhancement or retraining.
- **Rehabilitation Case Management (Mgmt)** – A collaborative process involving all Stakeholders that assesses, plans, implements, coordinates, monitors, and evaluates the options and services required to meet an Employee's Rehabilitation needs within the limits of privacy (Policy B-3.1 Privacy)
- **Stakeholders** – Includes anyone who has an interest in managing LTD including the Employee, employer, GWL, HBT and Union
- **Triage** – The process used by the employer to classify an Employee's barrier to return to work as medical, personal, workplace or vocational and identifying the resources to address these barriers

Practice

Assignment of Responsibilities

	Triage	Case Mgmt Plan	Rehab Services Referral	Intake	Medical Rehab Case Mgmt	Vocational Rehab Case Mgmt	Failure to Respond	Problem Resolution	LTD Claims Mgmt	Duty to Accommodate	HR Referral
Employer	R/A	R/A	R/A	S	S/I	R/S/I	R/A	R/A	R/S/I	R/A	R/A
HBT Team Leader			R	R	R	R		R/A	I		
Rehab Consultant		I/S	I	A	A	A	S	A	S/I	S/I	S/I
GWL Team Manager			R					R/A	R		
GWL Case Manager			A	I	S/I	S/I		A	A	S/I	S/I
Union	S/I	S/I	I	I		S/I	A	A	S/I	A	R/A

Legend: R = Responsible for results A = Accountable to perform activity S = Supporting role I = Informed of activity