



HBT POLICY:  
Intake Assessment  
Rehabilitation Services A-3.1  
Policy Number OC-11-5-v1

## Policy Statement:

This policy provides a consistent and planned approach to identifying barriers to Gainful Employment and evaluating the potential for Rehabilitation Services to resolve these barriers through an Intake Assessment.

## Principles

- The Intake Assessment identifies barriers to Gainful Employment and evaluates the potential to resolve these barriers through Medical and/or Vocational Rehabilitation
- Professional and fiduciary responsibility to Stakeholders is balanced with an Employee-centred approach in recommending and providing Rehabilitation

## Guidelines

1. The Intake Assessment completed by Rehabilitation Services includes the following:
  - Detailed review of medical information
  - Detailed review of job demands
  - Discussion with the employer regarding workplace issues
  - Discussion with the employer regarding Employee's functional abilities and limitations related to the Employee's current or alternate position
  - Interview with the Employee
2. Rehabilitation Services collaborates with the employer and Great-West Life (GWL) on Rehabilitation Services referrals sharing information as authorized by the Employee (Policy B-3.1 Privacy)
3. Rehabilitation Services communicates relevant information about the Employee to the employer necessary for the employer to carry out return to work planning
4. If the Employee is unable to return to his/her own job, Rehabilitation Services will collaborate with the Employee, employer and GWL to identify a Gainful Employment goal

# Practice

The Intake Assessment follows a systematic process to gather the information necessary to determine barriers to Gainful Employment.

- 1) Rehabilitation Services determines the current barriers to Gainful Employment:
  - a) Medical - Illness or injury that has not improved sufficiently; an Employee awaiting medical services
  - b) Workplace - Interpersonal issues with the employer or colleagues; waiting for employer to determine if accommodation is possible
  - c) Vocational - Skills gap
  
- 2) Rehabilitation Services evaluates the diagnosis and how it impacts function in terms of:
  - a) The level of function required for the Employee's current job
  - b) The level of function currently described by the Employee and the supporting documentation
  - c) Interventions used to increase the Employee's function
  - d) Active participation by the Employee in his/her treatment and recovery
  - e) Anticipated return to own occupation or other Gainful Employment by the Employee
  
- 3) Rehabilitation Services may gather further information for clarification:
  - a) Additional medical assessment (Policy A-4.1 Independent Medical Consultations)
  - b) Additional functional or vocational assessment (Policy A-5.1 Referrals to Service Providers)
  - c) Information about workplace issues from the employer
  - d) Information from the doctor, other health care providers or other involved agencies
  
- 4) Rehabilitation Services considers the prognosis for the Employee:
  - a) Is a return to current job without Rehabilitation possible?
  - b) If not, will Rehabilitation provide sufficient functionality to allow a return to current job?
  - c) If not, will Rehabilitation provide sufficient functionality to allow a return to Gainful Employment?
  - d) If not, what Rehabilitation is required to enhance Employability?
  
- 5) Rehabilitation Services consults and collaborates with the employer and GWL (Policy A-2.2 Collaboration with Great-West Life and Employers) considering the following hierarchy in determining a Gainful Employment goal:
  - a) Own job when:
    - i) Barriers are not permanent
    - ii) No functional restrictions; no workplace accommodations by the employer are required
    - iii) Minor functional restrictions; some workplace accommodations by the employer are required and can be provided
  
  - b) Alternate job with own employer when:
    - i) Barriers may be permanent

- ii) Employer able to provide accommodations or modify a job; no skills enhancing or retraining is required
  - iii) Employer able to provide accommodations; skills enhancing or retraining is required
- c) Alternate job with different employer when:
- i) Barriers may be permanent
  - ii) Own employer is unable to provide accommodations or modify the job; no skills enhancing or retraining is required
  - iii) Own employer is unable to provide accommodations; skills enhancing or retraining is required
- 6) Rehabilitation Services considers the following factors in resolving barriers to Gainful Employment:
- a) Potential for Rehabilitation to resolve barriers
  - b) Timeline required for Rehabilitation
  - c) Strengths and expectations of Employee
  - d) Strengths and expectations of employer
- 7) Rehabilitation Services determines the Rehabilitation required for Employees assessed with good potential for Rehabilitation to resolve barriers to Gainful Employment (Policy A-3.2 Rehabilitation Plan)
- 8) For Employees assessed with poor potential for Rehabilitation to enhance Employability, the case is escalated (Policy A-1.2 Problem Solving/Escalation of Concerns)

## Definitions

- **Employability** – The ability to perform Gainful Employment
- **Employee** – Employees of HBT’s member employers who are covered by the HBT LTD Plan (plus the HSA LTD Trusts)
- **Gainful Employment** – Occupation for which the Employee has the education, training and/or experience at a rate of pay defined by the Employee’s LTD plan (see Collective Agreements: Long Term Disability Insurance Plans in *Relevant Documents/Links*)
- **Intake Assessment** – Includes an evaluation of medical information, an Employee interview, a discussion with the employer to identify current or potential barriers to Employability and, if barriers exist, an evaluation of the possibility of these barriers being addressed by Rehabilitation
- **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.

- **Stakeholders** - Includes anyone who has an interest in managing LTD including the Employee, employer, GWL, HBT and Union

## Relevant Documents / Links

**A:** Collective Agreements: Long Term Disability Insurance Plans

<http://www.heabc.bc.ca/Page20.aspx>

[http://www.cssea.bc.ca/public\\_documents.php](http://www.cssea.bc.ca/public_documents.php)