



## REPORT TO THE BOARD OF TRUSTEES

From: Steve Matovic

Date: June 6, 2018

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Subject: Rehabilitation Report # 70 - 130th LTD Full Board Meeting

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### **EXECUTIVE SUMMARY**

This report covers the period from January 1, 2018 to April 30, 2018. At the beginning of the year 613 members were in receipt of LTD benefits. This included 522 members who received payments and 91 (14.8%) members who received ancillary benefits only.

At the end of April 2018, the total declined by 3% to 595 members on LTD, including 506 who received payments and 89 (15%) who received ancillary benefits only.

Please refer to the Appendix for tables with the number of members in each claim category by age range at April 30, 2018.

The average caseload for each of the seven rehabilitation counsellors was 53.6 at the end of April 2018. 50% of the average caseload was comprised of early rehabilitation referrals for members during the weekly indemnity period.

164 members returned to work from January 1 to April 30, 2018. 142 were early STD rehabilitation cases (87%) and 22 were LTD cases (13%). 157 members (96%) returned to work with the same employer.

Rehabilitation expenditures (unaudited figures) for January to April 2018 totalled \$52,598 which was \$27,000 less than the YTD budget of \$79,833. In the first four months of 2018 expenditures decreased by \$16,000 for retraining, and by \$12,000 for claimant travel and accommodation in comparison to the same period in 2017.

Over the period January 1 to April 30, 2018, one CPP Disability benefit claim was appealed successfully at the reconsideration stage for an estimated total offset of \$51,960. Two additional appeals were submitted; one at the reconsideration stage and one at the Social Security Tribunal.

More detailed information follows in the body of the report.

## **NEW LTD CLAIMS APPROVED**

From January 1, 2018 to April 30, 2018, the Plan approved 43 new LTD claims, compared to 45 new LTD claims approved over the same period in 2017.

## **CASELOADS**

Over the first four months of 2018 there were a total of 239 new referrals to rehabilitation services (STD\* and LTD). This is a 10.8% decrease compared to the 268 new referrals for the same period in 2017.

At the end of April 2018, there were 375 cases assigned to seven (7) Rehabilitation Counsellors, for a caseload average of 53.6. This compares to a total of 418 cases assigned at the end of April 2017 and a caseload average of 59.7.

187 of the 375 rehabilitation cases assigned at April 30, 2018 were for members referred for early rehabilitation services during the weekly indemnity period. So 50% of the average rehabilitation caseload was comprised of members on weekly indemnity claims.

\*Note: in this report STD is an abbreviation for “short term disability” which is synonymous with weekly indemnity.

## **RETURN TO WORK OUTCOMES**

164 members returned to work from January 1 to April 30, 2018. Of the 164 members who returned to work, 142 were early STD rehabilitation cases (86.6%) and 22 were LTD cases (13.4%).

Of the 142 STD cases; 128 (90.1%) returned to work to the same employer and occupation, 10 (7.1%) returned to a modified occupation with the same employer and one (0.7%) returned to another occupation with the same employer. Two (1.4%) returned to unionized work with a different employer in the forest industry, and one (0.7%) returned to work to a non-union position in the forest industry.

Of the 22 LTD cases; 15 (68.2%) returned to work to the same employer and occupation, two (9.1%) to a modified occupation with the same employer, one (4.5%) to a new position with the same employer. One (4.5%) member found work with another unionized forest industry employer, one (4.5%) with a non-union forest industry employer, one (4.5%) moved to employment outside of the forest industry, and one (4.5%) received help from the Plan to retrain and found new employment.

Overall, out of a total of 175 members who were on STD or LTD and fit to return to work, 164 (93.7%) successfully returned to work at time of case closure. The counsellors closed six cases during the STD period for members who were fit to return to work (two of these were pending availability of work, and four cases involved members who had a new focus for employment outside of the forest industry). One member’s LTD claim ended following participation in rehabilitation when he decided to relocate.

One member's LTD claim was ended based on adjudication that he had recovered and was fit for his own position. Three members completed retraining during LTD but were not working at closure.

17 rehabilitation cases were closed for reasons other than return to work or fitness to return to work. Two members transitioned from STD to a WCB claim. Five members were closed as inactive/non-compliant with rehabilitation during the STD period (three of these cases later returned to work in the forest industry). Six STD cases and one LTD case were closed because of an inability to locate the member (two of these members later returned to work in the forest industry). Three cases were closed when the LTD claim was ended for members at age 60 or over.

There were 11 rehabilitation case closures for members who retired in the first four months of 2018.

### **REHABILITATION EXPENSES**

Rehabilitation expenditures (unaudited figures) for January to April 2018 totalled \$52,598 which was \$27,000 less than the YTD budget of \$79,833. The largest segment of rehabilitation expenditures was applied to the funding of physical conditioning, physical activation and assessment services to prepare members to return to work (\$29,000). The other main expenses were the sponsorship of vocational assessments, education and training programs to help members secure work in alternate occupations (\$17,519); costs of travel and accommodation to help members to access services (\$4,173), and psychological/clinical counselling services (\$1,806).

In the first four months of 2018 expenditures decreased by \$16,000 for retraining, and by \$12,000 for claimant travel and accommodation in comparison to the same period in 2017.

### **CPP DISABILITY BENEFIT: APPLICATIONS, RECONSIDERATIONS & APPEALS**

The Plan's rehabilitation counsellors continue to work in cooperation with the medical adjudicators from FIDAS to identify members who require assistance to apply or appeal for the Canada Pension Plan Disability (CPP-D) benefit.

Over the period January 1 to April 30, 2018, one CPP-D claim was appealed successfully at the reconsideration stage for an estimated total offset of \$51,960. Two additional appeals were submitted; one at the reconsideration stage and one at the Social Security Tribunal.

Some members will not qualify for the CPP-D benefit because they have insufficient contributions to the CPP within the timeframe required to support eligibility, some do not meet the CPP definition of disability, and others have exhausted the opportunity for any further appeal.

Gabriel Horvath and Angeline Donald received initial training from Gordon Philip this March to begin to assist members with CPP-D applications and appeals in their assigned regions. Gordon continues as the specialist rehabilitation counsellor for CPP-D cases in the balance of British Columbia and for members residing in other provinces.

## **REHABILITATION COUNSELLORS - SUCCESSION & REGIONAL ADJUSTMENTS**

Brenda Christensen was hired as a rehabilitation counsellor effective March 12, 2018, and she is based at the rehabilitation office in Prince George, along with Angeline Donald. Brenda is continuing her training, and has been assigned the territory along the Highway 16 corridor from west of Prince George to Houston, as well as Terrace.

Gabriel Horvath added Williams Lake to his assigned territory in April, in addition to his existing cases in Quesnel and in the Southern Interior.

## APPENDIX

### AGE DISTRIBUTIONS FOR LTD CLAIM CATEGORIES – APRIL 30, 2018

Of the 595 members receiving LTD benefits at April 30, 2018, 364 (61.2%) were in Category “01” (permanent total disability); 203 (34.1%) were in Category “03” (temporary disability), and 28 (4.7%) were in Categories “02” (commitment agreement in place) or “02A” (rehabilitation assessment and planning).

CATEGORY 01			CATEGORY 02		
Age	Count	%	Age	Count	%
21 - 30	1	0.3%	21 - 30	1	8.3 %
31 - 40	7	1.9%	31 - 40	5	41.7 %
41 - 50	45	12.4%	41 - 50	3	25.0%
51 – 54	78	21.4 %	51 - 54	0	0%
55-59	233	64.0%	55-59	3	25.0%
AVG: 55	Total: 364	100%	AVG: 43	Total: 12	100%

CATEGORY 02A			CATEGORY 03		
Age	Count	%	Age	Count	%
21 – 30	2	12.5%	21 – 30	9	4.4%
31 – 40	4	25.0%	31 – 40	32	15.8 %
41 – 50	5	31.3%	41 – 50	50	24.6%
51 – 54	3	18.7%	51 – 54	41	20.2%
55-59	2	12.5%	55-59	70	34.5%
>60	0	0%	>60	1	0.5%
AVG: 43	Total: 16	100%	AVG: 49	Total: 203	100%