

## **Job Description/Specification**

<b>Identification</b>	<b>J0288</b>	<b>TFEU/BCTF Joint Salary Committee Decisions</b>
<b>JOB/POSITION TITLE:</b>	Case Manager	<b>FORMER TITLE/DEPARTMENT:</b> ISD Case Manager
<b>DIVISION/DEPARTMENT:</b>	Income Security Division	<b>PAY GRADE:</b> 6
<b>SUPERVISOR'S TITLE:</b>	Manager	<b>DATE APPROVED:</b> December 21, 2020

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### **Function and purpose (a)**

The Case Manager, Income Security Division (ISD), under the general direction of the Salary Indemnity Plan (SIP) Administrator and as a member of a team, manages the SIP cases for individual members and assesses and determines member's eligibility and candidacy for rehabilitation through the BCTF Health and Wellness (H&W) Program.

The Case Manager, ISD adjudicates and approves or declines the payment of short-term benefits to claimants according to appropriate plan regulations and other pertinent criteria, co-ordinates the processing and forwarding of Long Term Disability (LTD) applications to Canada Life (CL), verifies candidates for the H&W Program and applies established service delivery-criteria when assessing external Rehabilitation Consultants (RC) recommendations and plan details and monitors and provides oversight of the external service provider and individual rehab consultant network for quality assurance purposes.

### **Principal duties and responsibilities (a)**

1. Analyzes, investigates and approves or declines cases assigned for Short-Term Disability (STD) claims according to established service standards.
2. Identifies potential LTD claims and forwards all pertinent member or case information to CL for their action.
3. Records and ensures accuracy of pertinent member or case information in appropriate system.
4. Interprets and applies BCTF SIP regulations, medical reports, legal information, statutory laws and legislation as required.

5. Contacts members and/or stakeholders to clarify and/or validate information received and/or request additional supporting information.
6. Generates correspondence to members and/or stakeholders as required. Tailors the correspondence as required to meet the needs of the member or the circumstance.
7. Explains ISD's processes and services to members and stakeholders as required and/or refer questions to other ISD staff where a particular type of expertise or knowledge is identified.
8. Approves and authorizes STD benefit payments to members. Establishes and monitors the collection of overpayments and repayment terms. Calculates and applies Workers' Compensation Board (WCB) offsets and calculates and remits garnishments.
9. Liaises with CL disability specialists/case managers, H&W Program Advisors, members or member representatives on accommodation, retraining, volunteer or other LTD issues.
10. Approves, refers or declines applications for Accommodation Employment, course work and volunteer work.
11. Recommends to the SIP Plan Administrator courses of action regarding members pertaining to Independent Medical Examinations (IME), Functional Capacity Examinations (FCE), surveillance and Canadian Pension Plan (CPP) Appeals.
12. Provides advice and information to members regarding their disability claim status, sick leave/employment and other benefit options. Advises claimants to seek independent estate planning and related considerations.
13. Identifies potential candidates for Income Assistance, confirms member's participation and assists members in obtaining assistance as needed. At the direction of the Assistance Society (AS) ensures the processing of garnishments of benefits for the repayment of AS loans.
14. Approves candidates for H&W Program services and forward to external RC's based on established criteria.
15. Reviews the individual treatment plans, progress reports, medical reports and graduated return to work plans, budgets, and recommendations of the external service provider network. Authorizes all H&W services and expenditures. Verifies and ensures consistent application of established service delivery standards, reporting and billing processes.
16. Reviews the plans, budgets, and recommendations of the external service provider network for ongoing compliance.

17. Seeks H&W Program Advisors advice for exceptional cases.
18. Monitors member's rehabilitation progress and approves or denies Rehabilitation Consultants recommendations and expenditures.
19. Discusses medical adjudication and progress of claims with H&W Program Advisors, rehabilitation consultants, Health and Wellness Program Coordinator and Plan Administrator to establish an appropriate and consistent course of claim treatment and action.
20. Provides information and advice to members, local association officers and school board personnel regarding benefit entitlements, leaves and accommodation employment options, coverage and administrative procedures; participates in internal and external case conferences with the H&W Program Advisors, Program Coordinator and rehabilitation consultants when requested.
21. Requests and/or provides information on members behalf to/from the BC Pension Corporation.
22. Under the direction of the Plan Administrator and in conjunction with the Case Assistant ensures that appropriate information is provided for legal requests.
23. Undertakes ongoing training as required due to the evolving fields of medical adjudication and vocational rehabilitation.
24. Performs other related duties as assigned by Supervisor.

## **JOB REQUIREMENTS**

**This section sets out the minimum requirements in the areas of EXPERIENCE, EDUCATION, TRAINING, CERTIFICATES AND PHYSICAL DEMANDS necessary to perform the job.**

### **Experience (b)**

Minimum of five (5) years' experience in disability case and claim management within a unionized environment in an intermediate to large organization demonstrating the following:

- Working knowledge in disability claims regulations and procedures, Human Rights Legislations, Freedom of Information and Privacy Legislation, and application of collective agreements.
- Working knowledge of disability management and vocational rehabilitation principles and best practices.
- Working knowledge of claims processing and adjudication.
- Ability to adapt and be flexible to changing priorities and manage a demanding workload, and be guided by policies and procedures, regulations, legislation, and collective agreements.
- Excellent interpersonal and communications skills, both verbal and written.
- Proven analytical, problem solving and decision-making skills, and the ability to facilitate the resolution of issues.
- Ability to apply tact, judgment and discretion in decision making.
- Ability to explain and clarify complex procedures and issues.
- Thorough and accurate record keeping.
- Demonstrated ability to work as an effective member of a team and to work independently with only general direction.
- Commitment to the value of continuous learning and an open curiosity for new ideas and innovation.
- Working with clients to identify and overcome barriers to employment.

Experience in providing these services in a member driven environment is an asset.

### **Education and training (c)**

- University Degree in a Health-Related Discipline or Social Science or related field.

### **Licences and certificates (c)**

- Eligibility for a professional designation related to Disability Management.
- Certificate in Medical Terminology.

## **JOB CHARACTERISTICS**

**This section is a key component of the Salary Determination process. This section also forms part of the job description and describes some of the conditions under which the work is performed.**

### **Contacts and relationships (d)**

Contacts and relationships with all levels of Federation staff and local officers are required to transmit, exchange or clarify information, provide advice about member services provided by ISD and to make recommendations or to seek advice regarding member participation in and candidacy for the H&W Program. Information is of a highly confidential medical nature.

Regular contact with teacher members to provide information on and clarification about the rules and regulations governing the SIP (STD and LTD) and to seek cooperation and compliance with these; to explain the service standards and candidacy requirements of the voluntary H&W Program and to encourage participation in this program where appropriate; to explain ISD services and to forward inquiries when needed to appropriate Federation staff.

Contact with persons external to the Federation include school board officials including payroll and human resources personnel, external service providers, rehabilitation contractors, health care professionals. CL case managers and associated staff, insurance staff including ICBC, BC Pension Corporation, BCTF AS Board of Directors, EI/WCB/ CPP claims officers.

The position is required to provide, explain and interpret complex information, promote collaboration, and to ensure compliance with service delivery standards and Federation reporting expectations. Courtesy, tact, sensitivity, diplomacy and confidentiality in dealing with external contacts, members and/or member representatives are required.

Information obtained or provided is routinely of a highly confidential personal, medical or financial nature. Staff may be required to represent BCTF and to act on behalf of BCTF if subpoenaed, named in a Writ of Summons or in court orders.

### **Machines, equipment and work aids used**

Computer terminals and printers, manuals, policy statement and reference material related to medical and vocational rehabilitation services and claims management, software related to records management and report preparation, telephones, fax machines and photocopiers. Documentation related to laws and regulations and contracts in the claims, rehabilitation and occupational health fields.

**Positions supervised (e)**

None.

**Physical and/or mental effort (f)**

This position includes the processing of a high volume of work while balancing incoming calls.

Additional pressures arise from working with physically/psychologically ill members and their families, and from schedules and deadlines beyond the control of the position. The position also requires interaction with members who may be in crisis. This contact may be by telephone, electronically, or in person.

**Working conditions (g)**

Exposure to video display screen glare when operating a computer terminal. To preserve the confidentiality of medical files, it is necessary to secure and limit access to the office area.