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## Stakeholder Roles/ Needs Checklist

Managing disability claims requires ongoing cooperation and communication between all the key stakeholders. Listed below are the key stakeholders, their roles and what they require to support an early and safe return to work.

### **Supervisor/Manager/Human Resources**

Role: As stated above effective claims management requires ongoing cooperation and communication between all stakeholders. It is the responsibility of the human resources manager to ensure all supervisors and managers understand the importance of establishing rapport with all their employees from the day they are hired. Employer/employee rapport can often ensure absenteeism issues are resolved before lost time occurs. Once an employee ceases work, it is critical that a company representative maintain employee contact regularly. This requirement needs to be written into the policy and procedure manual. It should clearly state who is responsible for communicating with the disabled employee.

Needs:

- Training in duty to accommodate and other legislation
- Rapport building skills
- Disability management forms including a functional abilities form, policy documentation on return to work and a physical demands analysis pertaining to the job. This should be given to all employees as soon as possible after a lost time claim occurs.
- Employee contact information
- Completed functional abilities information from employee

### **Disabled Employee**

Role: The employee plays a central role in return to work planning. First and foremost the employee must communicate to the employer issues that may affect their ability to perform their job responsibilities, ideally before a lost time claim occurs. In addition, to avoid repetitive strain injuries, the employee has a responsibility to communicate job demand issues that may result in a lost time claim in the future. Once a lost time claim occurs, the employee has a responsibility to seek out appropriate care as soon as possible and provide job description information including physical demands to the treating physician and treatment providers and functional abilities information to the employer to facilitate an early and safe return to work.

Needs:

- Training on role and responsibilities regarding absenteeism policy and procedures
- Functional Abilities Form
- Copy of return to work policy and procedure
- Letter for attending physician that explains corporate policy on return to work
- Name, telephone, fax, email address of primary contact (usually case manager)



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### **Attending Physician**

Role: The attending physician is responsible for diagnosing, recommending appropriate treatment, monitoring progress and quantifying physical abilities. The physician is not an adjudicator or arbitrator. Matching the disabled employee's physical abilities and the job demands is the responsibility of all stakeholders.

Needs:

- Letter from employer explaining policy and procedures regarding a return to work.
- Physical demands analysis to understand the employee's primary job demands
- Case manager contact information

### **Case Manager**

Role: The case manager gathers information, problems solves and designs and coordinates the return to work plan ensuring compliance with applicable legislation. Generally the case manager has an arms length relationship with the employer to ensure the employee's medical documentation remains confidential and ensure objectivity throughout the process. If you have an internal case manager (i.e. occupational health department), the employee needs to understand that medical documentation will not be shared with co-workers, managers or supervisors. The case manager has regular contact with all the stakeholders to ensure a timely return to work occurs. He or she is responsible for designing, negotiating and implementing a return to work plan in cooperation with all the other stakeholders. If additional expertise is required such as an ergonomic assessment, the case manager is responsible for arranging this.

Needs:

- Timely notification of lost time claims
- Clear understanding of employee's physical abilities, return to work obstacles, job demands, estimated return to work date and accommodation options.
- Credentials and ongoing training (i.e. Register Rehabilitation Professional designation)
- Stakeholder contact information including names, addresses, telephone, fax and email.
- All documentation pertaining to claim (i.e. insurance carrier forms, completed functional abilities information.
- Database of internal and external service providers and resources.

### **Treatment Provider**

Role: Under the direction of the attending physician, the treatment provider is responsible for restoring the disabled employee's functional abilities. Treatment providers may include one or more of the following: physiotherapist, surgeon, psychologist, psychiatrist, occupational therapist. Since treatment is key to assisting the disabled employee return to work, it is critical that the treatment provider have a detailed understanding of the employee's job demands. The treatment provider can also be helpful in determining when a graduated return to work is appropriate and what parameters are required to ensure a successful outcome.

Needs:

- Detail physical demands analysis
- Case manager contact information