

Susquehanna Conference Joint Committee on Medical Leave

Process for Granting Medical Leave and Applying for Disability Income Benefits

INTRODUCTION:

Guidance relating to the process for granting Medical Leave and applying for Disability Income Benefits can be found in ¶1356, *The 2016 Book of Discipline*.

Conference Joint Committee on Medical Leave (henceforth referred to as JCML), consisting of members from the Conference Relations Committee from the Conference Board of Ordained Ministry (BOOM), the Board of Pensions and Health Benefits (BOP) and the Cabinet, is responsible for the process of reviewing requests for Medical Leave. Approval for Disability Benefits occurs exclusively through Wespath and Liberty Mutual, coordinated by the Chief Benefits Officer of the Susquehanna Conference.

Obtaining Medical Leave and Disability Income Benefits involve two separate decisions, and have separate qualifying criteria.

- Medical Leave. Upon recommendation of the Joint Committee on Medical Leave, and approval by the Conference Board of Ordained Ministry and the Board of Pensions, and by a majority vote of the executive session of clergy members in full connection, a clergy may be granted annual medical leave without losing their relationship to the annual conference. (within the Conference year approval is through Executive Committee of BOOM)
- Disability Income Benefits. The BOP is responsible for administering the clergy application for Disability Income Benefits. *However, Wespath is solely responsible for determining one's eligibility to receive Disability Income Benefits.*

Having made these distinctions, it is important to know that to receive Disability Income Benefits from Wespath one must be placed on Medical Leave. On the other hand, one may be placed on Medical Leave, yet not be approved to receive Disability Income Benefits.

The relationship of medical leave may be initiated by the clergy member or cabinet with or without the consent of the clergy member through the Board of Ordained Ministry. When medical leave is given without the clergy member's consent, reasonable accommodation shall be offered whenever possible.

PROCEDURES FOR MEDICAL LEAVE AND DISABILITY INCOME BENEFITS:

The process of applying for Medical Leave and Disability Income Benefits has been combined into this single document and is as follows:

1. In the event of a request for Medical Leave, the clergy applicant (spouse, next of kin or Power of Attorney) must submit a written request for medical leave to the District Superintendent and Bishop.
2. To request an application for disability benefits, the clergy applicant contact his/her District Superintendent or the benefits administrator in the Conference Office. If the clergy applicant is unable to make the request, the spouse, next of kin, or Power of Attorney may make the request. The superintendent may suggest a clergy or lay person to assist and support the applicant throughout the process.
3. Once the request for disability benefits has been received, the benefits administrator will send a claim packet and instructions to the clergy member. The packet will include:

Form A: Applicant Information for Comprehensive Protection Plan (CPP) Long-Term Disability Benefits – This form is information that you will need to complete and remit back to the Conference office.

The medical providers you name on Form A will receive information from Liberty Mutual requesting your medical data/history. In addition to Form A, there are two authorizations to release information. It is very important that you complete these forms and remit back to the conference office.

Form C: Clergy Disability Benefits Application: This is the actual application form for the disability/medical leave. You will need to obtain your district superintendent's signature and remit to the Conference office. The Benefits Administrator will obtain the other two signatures required on the form. The form includes a medical release giving Wespeth permission to ask for additional medical documentation.

Once these forms have been received by Wespeth of The United Methodist Church, the Board will open the claim. A typical claim normally takes 30 – 45 days. If you or your provider receives a request for any additional information, then it is highly recommended for you to contact your provider to help expedite the process. Otherwise, the provider may not return the necessary documentation and your claim could be denied due to lack of medical evidence.

4. Wespeth bases the amount of the benefit on the assumption that the clergy person is also receiving Social Security Disability. Thus, Wespeth pays the difference between the Social Security Disability benefit and the total benefit to which the clergy person is entitled. If the clergy person has opted out of Social Security, the benefit from Wespeth will be the same as though the clergy person were receiving Social Security Disability.
5. Once the request for medical leave is received, the Cabinet will notify the Chair of the Board of Ordained Ministry and Chair of the Conference Relations Committee. Based on recommendation from the Cabinet and CRC, BOOM (or BOOM's executive committee) will approve the change of appointment status to Medical Leave.
 - i. The chair of the CRC will notify the Board of Pensions and convene the Joint Committee on Medical Leave. JCML will review the request for disability income benefits, with anecdotal evidence which may include an interview of the clergy person or a person designated by the clergy person, and recommend (or not) granting benefits. BOOM and

BOP must approve the recommendation (full or executive committee). Once medical leave is granted, the cabinet and clergy, in consultation with the local church, will agree upon an effective date for the leave and the benefits began or will begin.

6. The executive session of the clergy will consider only the change of relationship at annual conference.
7. If the clergy applicant is denied disability income benefits by the JCML, request for reconsideration may be made if additional information or changes occur. The clergy may remain/return to active status or request medical leave without benefits or voluntary personal leave. All requests must be in writing.
8. If the clergy applicant is denied disability income benefits by Wespath through Wespath/Liberty Mutual
 - i. The clergy applicant may file an appeal. Benefits continue throughout the appeal process. See addendum A.
 - ii. The clergy applicant may choose to remain on medical leave without benefits, may seek a voluntary personal leave of absence, or return to active status and receive an appointment. Request for any of these must be in writing.
 - iii. A clergy applicant requesting personal leave of absence will be interviewed by the Conference Relations Committee which makes a recommendation to the Board of Ordained Ministry. Relationship changes are approved by the executive session of clergy members at annual conference. Mid-year changes may be approved by the Cabinet and the executive committee of BOOM.
 - iv. If the appeal process approves the benefits, the clergy will continue Medical Leave with benefits, subject to guidelines of Wespath/Liberty Mutual and the clergy's medical professionals until the medical concern no longer meets the provisions for disability.
9. Information obtained by the JCML is held in the strictest confidence. Additionally, the JCML may not obtain Personal Health Information (PHI) which will be protected in accordance with The Health Insurance Portability and Accountability Act of 1996 (HIPAA) as administered by the Susquehanna Board of Pensions and Health Benefits.

PROCESS FOR COMING OFF MEDICAL LEAVE

When approval for medical benefits by Wespath ends

- Approval for disability income is reviewed annually, a process administered by The Wespath.
- When eligibility for continued disability income ends, the clergy person will need to make a choice to request a change of relationship to retirement, voluntary leave of absence, honorable location, active status, or to continue the relationship of medical leave with no disability income. **The Voluntary Transition Program is available until 2020 and may also be an option.**

To request a change of relationship to retirement

- A written request for a retired relationship with the annual conference should be sent by the clergy person making the request to the bishop and copied to the district superintendent, Conference Relations Committee
- More information about retirement can be found in *The 2016 Book of Discipline* in ¶357

To request voluntary leave or honorable location

- The process to request a voluntary leave of absence can be found in *The 2016 Book of Discipline* in ¶353.
- The process to request honorable location can be found in *The 2016 Book of Discipline* in ¶358.

To continue the Relationship of medical leave with no disability income

- Clergy person must make a request for continued medical leave through the Conference Relations Committee of the Board of Ordained Ministry.

To request a change of relationship to return to appointment

- The clergy person should have a “consultation session” with their district superintendent to discuss returning to ministry and a conversation with the benefits administrator.
- The clergy person should send a letter to the Bishop, with a copy to the district superintendent and the Office of Ministerial Services (conference secretary), requesting an appointment for the upcoming conference year, including a statement indicating the progress clergy has made regarding one’s capability for active ministry.
- Request a physician or counselor to send a report to the Susquehanna Conference Board of Ordained Ministry, providing medical evidence that the clergy person has recovered sufficiently to resume ministerial work (*The 2012 Book of Discipline*, ¶357.3). The Duties of the Pastor (¶ 340) should be reviewed by the physician and addressed in the medical report.
- The clergy person should request a letter of recommendation from the district superintendent to the Board of Ordained Ministry.
- The clergy person will meet with the JCML to determine capability for active ministry.
- The Joint Committee on Medical Leave will make a recommendation regarding a change in conference relationship to the Board of Ordained Ministry.
- The executive committee of the Board of Ordained Ministry must confirm the recommendation regarding conference relationship.
- The executive session of clergy must confirm the request regarding conference relationship.
- The effective date of terminating incapacity leave is June 30 following the request, unless the bishop appoints between sessions of the annual conference, in which case the bishop determines the effective date of appointment.

Additional remarks:

- All correspondence should be in print and the clergy person should keep copies of all correspondence and medical documents
- Following a conversation with the District Superintendent, the applicant should receive a follow up call to assure that the process is clear and the person is able to navigate the process.
- Each year the Conference Relationship Committee should contact those on Medical leave to offer encouragement, support and connection.

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Addendum A

(taken from page 6 of Susquehanna Conference Board of Pensions Policies Revised 1-13-18)

If already enrolled in our Active plan, clergy appointed to **Medical leave** may retain coverage as per the following circumstances:

Applying for Disability – when a clergy person is applying for disability benefits through CPP, the Susquehanna Conference will provide 70% compensation, health care (available at their current level), and pension benefits while the application is in process.

- If approved, compensation would be reimbursed in the form of a grant from Wespath and the balance of benefits would come from reserves.
- If denied, all funds would come from conference reserves and compensation/benefits would end when denial is received.

Appealing Disability – when a clergy person appeals the disability benefits denial through CPP, the Susquehanna Conference will provide 70% compensation, health care (available at their current level), and pension benefits while the application is in process.

- If approved, compensation would be reimbursed in the form of a grant from Wespath and the balance of benefits would come from reserves.
- If denied, all funds would come from conference reserves and compensation/benefits would end when denial is received.

If already enrolled in our Active plan, clergy appointed to **Medical leave** by voluntary choice, but not applying for disability through CPP, will not receive compensation and/or benefits.