

***Checklist
Sick leave to extended disability***

Appropriate steps must be followed in the process of accessing sick leave or disability benefits. The following checklist is a general guideline to ensure that the appropriate steps are taken and to assist you when applying for ED. It should be noted that individual circumstances may differ significantly and all cannot be anticipated. As variations may occur refer to the various resource agencies listed under “Where to Get Help”.

Take ownership! Be proactive!

Sick Leave

Date	√	Situation / Steps To Take	Notes
_____		1. Sick Leave (up to 90 calendar days)	
	—	You are unable to work due to illness or injury.	
	—	Obtain a medical certificate and file it with the CBE, (Occupational Health) and a copy to your principal, as a courtesy.	<i>You are required to obtain a medical certificate if you are away five (5) days or more.</i>
	—	Keep a copy for your records.	
_____		2. Manage Your Medical Care	
	—	Very early in the 90 days, schedule medical appointments (GP and Specialist). Remember it takes time to process these reports.	
	—	Submit each report as you receive it.	

3. Documentation File

As soon as you go on sick leave set up a separate file and keep a copy of all documents, written communications, phone calls and inquiries made in person.

You may wish to place a copy of this Checklist at the beginning of your file.

- Get confirmation of receipt of any documentation you send in.
- Maintain a daily health journal.
- Take a monthly record to your doctor's appointment.

Phone calls and personal inquiries—record date, time, person contacted and context of conversation.

Date	✓	Situation / Steps To Take	Notes
_____		4. Employee Services Forms etc Familiarize yourself with:	<i>Employee Information Centre 1-877-353-2555</i>
_____		CBE Employee Benefits Handbook	<i>www.cbe.ab.ca</i>
_____		ASEBP Benefit Information Handbook	
_____		Extended Disability Benefits Pamphlets	
_____		Obtain Forms: - SunLife – Major Medical - Dental Claim - Vision Care	
_____		At 30 days you should receive a letter from the Employee Health Resource Centre telling you your file has been sent to ASEBP. If not contact them.	<i>Employee Health Resource Centre Phone: 777-7788, ext 2400 Fax: 777-6055 You need your Employee ID #</i>

5. Employee Confidentiality

Due to confidentiality the Employee Services section of the Benefits Department does NOT communicate the status of your ED application with other departments such as payroll, staffing or the ATA.

— If your pay stub is going to your school, request Payroll to send it to your home address.

*Employee Information Centre
1-877-353-2555*

6. CBE Sick Leave Extensions

— As long as you are on sick leave you must submit written requests for extension of your sick leave **before** your sick leave expires.

— Request must be accompanied by a supporting letter or sick leave report from your physician.

— Once accepted by ASEBP for Extended Disability (after 90 days), inform Occupational Health and Occupational Health will inform necessary departments.

*Your sick leave is granted to a specific date. It is your responsibility to submit further requests for a sick leave extension **before** sick leave expires. It will assist the CBE if you do this as early as possible.
You might want to keep your principal informed.*

Date	√	Situation / Steps To Take	Notes
_____		7. Application for Employment Insurance (EI) Benefits	<i>Apply as soon as possible. Application and medical forms are available at the Federal (Harry Hays) Building (220 - 4 Ave SE) or by phoning. If possible, hand deliver medical form as your claim will not be processed until it is received. If you do not hear from EI in the time indicated, contact them. Certain original documentation (Birth Certificate) will be required for copy. You will need an employment record from the CBE. Income tax will be deducted. EI Phone # 1-800-206-7218.</i>
	_____	In case you are not initially accepted by ASEBP apply for EI Benefits.	
	_____	An interview is necessary after you have completed your application.	
	_____	Your physician is required to complete a form.	
	_____	Keep a copy of your application and medical form.	

EXTENDED DISABILITY

Date	√	Situation / Steps To Take	Notes
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8. Application for Extended Disability

Application for ED Benefits must be within the first 90 calendar days of being sick.

Three (3) forms required:

Employee Statement – attach a **copy** of your birth certificate. Send copy directly to ASEBP.

Two (2) Health Care Professional - Physician Statements
GP and Specialist.

If your doctor chooses to send the medical statement directly to ASEBP, insist you have a copy for your file. Notify Occupational Health when it is sent.

Keep copies for yourself.

*To expedite procedure, if possible, have your doctor fill out his form while you are at his office. If it is not completed properly it will have to be redone. It is helpful if your **doctor states that you are unable to perform your job as a teacher and why.** The doctor's statement should not specify date of return, but rather be left open-ended eg. **"will return to employment when determined medically fit to do so"**. Ask your doctor for a copy for your records. You may send documents as you get them to ASEBP.*

Date	√	Situation / Steps To Take	Notes
_____		9. Extended Disability Approval	
		ASEBP will communicate their decision directly to you. They notify Occupational Health, who informs all other departments.	
	_____	Make a copy of ED approval for your file.	
		While you are on ED you remain an employee of the CBE and are classified “on leave without pay”.	
	_____	You may request ASEBP to deposit payments directly into your bank account or have them mailed to you. Payments are made on the last day of the month. The payment receipt statement is sent through the mail and must be retained for tax purposes.	
	_____	At this time you receive a package that includes:	

- A. Personal tax credit return form that allows ASEBP to determine the amount of tax to be withheld from your ED benefit.
- B. Automatic direct deposit form.
Notice that your ATA membership is your responsibility (1-800-232-7208)
- C. Deduction of payment for CPP (Canada Pension Plan), authorizing CPP to reimburse ASEBP all monies paid in advance to applicant.
- D. Benefit payment details (what plan you are on with ASEBP and how much your payments will be).

—— CBE Employee Information Centre (1-877-353-2555) informs you what your benefits payment will be.

CBE bills every 6 months, but you can make individual arrangements.

- Supplementary Health and Vision (SunLife) 25%
- Dental (Mutual Life) 25%
- Alberta Health Care 100%

Date	√	Situation / Steps To Take	Notes
_____		<p>10. Extended Disability Rejection</p>	
		<p>If your application for ED is rejected you may submit further medical information. Medical information should describe your disabling condition, extent and severity of condition, restrictions imposed and how they prevent you from performing your occupation.</p>	<p><i>Your physician should state that you can not perform your job as a teacher and why.</i></p>
	_____	<p>If initially rejected request from your claims facilitator what medical information is missing and resubmit.</p>	<p><i>If information is acquired by phone, confirm conversation immediately in writing to your claims facilitator. Example of communication: “It is my understanding from our telephone conversation of (date)_____ that you only require further information on (details)_____. If this is not the case, please respond in writing”.</i></p>
	_____	<p>Additional information sent. File copies.</p>	
	_____	<p>If there is still a problem after additional information has been sent, contact your claims facilitator for clarification. You should also contact the ATA Southern Alberta Regional Office (SARO) and the Provincial ATA, Teacher Welfare.</p>	<p><i>ATA (SARO) Kurt Moench 265-2672 Provincial ATA - Teacher Welfare 1-800-232-7208</i></p>
	_____	<p>Be aware of the appeal procedure in the Extended Disability Handbook.</p>	
		<p>Important: If you are beyond the 90 day period and have not been granted ED, persist in your appeal, with the assistance of your physician/specialist, and the ATA. Also, extend your leave from the CBE. Under no circumstances forfeit your present teaching position at this time.</p>	

Date	√	Situation / Steps To Take	Notes
_____		11. Sick Leave Extension on Extended Disability	
		Once you have been granted ED benefits from ASEBP they inform Occupational Health who informs all other departments. If you need extended leave when not on ED contact Occupational Health.	<i>CBE will have granted you sick leave to a specific date (usually the date indicated by your doctor). It is your responsibility to request an extension before your leave expires. This should be done as early as possible in order to assist in staffing. Recognize offices are closed during holidays</i>
_____		12. Canada Pension Plan – Disability Benefits	
_____		Immediately apply for Disability Benefits under Canada Pension Plan from Health and Welfare Canada (1-800-277-9914).	<i>ASEBP will require that you apply for CPP. CPP makes an on the spot verification of documents. There is an approximate three-month response period. If rejected, appeal. CPP benefits are taxable.</i>
_____		Have your doctor complete the medical form.	
_____		Make an appointment and take completed forms, birth certificate and social insurance card to the Federal Bldg.	
_____		Your dependent children may be eligible for some benefits.	
_____		Immediately notify ASEBP with a copy of your acceptance or rejection letter from CPP.	
_____		If your application is turned down, you have 90 days to appeal. Do so.	

13. Medical Benefits

Prior to the CBE salary expiration (no more CBE sick leave left) you must make necessary changes for your medical and dental care. **Do not let coverage lapse. If you do you can NOT be reinstated.**

If you have an employed spouse you may be able to get coverage under his/her medical and dental insurance.

Date	√	Situation / Steps To Take	Notes
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Medical Benefits (cont'd)

_____ Request pay schedule for premiums from Employee Benefits.

*You should be billed if you choose to keep your medical and dental plan. It is **your***

_____ Supplementary Medical and Dental Insurance is optional and it is paid directly to CBE at group rate offered.

responsibility to ensure payments of premiums are up to date. The CBE sends out:

- *CBE Benefit Costing Worksheet/Employee Portion*
- *CBE Benefits Costing Worksheet/Employers Portion*

_____ Alberta Health Care is currently paid through your CBE Benefits Package. Check with Alberta Health Care that you are covered.

*Alberta Health & Wellness
297-6411*

14. ATA Membership

_____ You are required to maintain your ATA membership.

Leave of Absence Associate Membership is approximately \$48.00 a year.

_____ Apply for Leave of Absence Associate Membership.

*Contact ATA - Sheila Rolfe
1-800-232-7208 Ext 281*

15. Teachers' Retirement Fund

Teachers in receipt of ED benefits are not required to contribute to TRF in order to continue to accrue pensionable service. **However, you must apply.**

— Apply to TRF. Request the Disability Service Accrual Application.

*TRF 1-800-661-9582
Attn: Joan Wood*

— Request ASEBP to send a copy of your approval letter to TRF. **Also request a copy for yourself.**

16. Benefits While on Extended Disability

In addition to your pension premiums being waived, you do not have to pay CPP, EI, ED or full ATA fees. You continue to receive life insurance coverage at no cost.

Date

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Situation / Steps To Take

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17. Income Tax

— Your disability payments from ASEBP are taxable income and need to be reported on your income tax form. Taxes are deducted by ASEBP from your ED payments.

It is essential to prove eligibility for certain medical aids which may be tax exempt.

— Canada Pension Plan disability payments must be reported on your income tax form as they are taxable. You receive a T4 before tax time.

— File your income tax form.

18. Disability Tax Credit Certificate

If you are eligible it will lower your income tax.

Approval/eligibility is subject to periodical Revenue Canada medical review.

Obtain application form.

*Canada Revenue
1-800-959-2221.*

Have your physician fill in his portion of the application.

Application form #T2201.

File form with your income tax.

This form is included in the Booklet, "Tax Information for People with Disabilities".

File copy.

Qualifying for Canada Pension Plan disability does not mean you qualify for tax credit. You must have impairment which is prolonged (at least 12 consecutive months) and it markedly restricts your ability to perform one or more basic activities of daily living ie speaking, hearing, walking, eliminating, feeding, dressing or mental functions.

19. Calgary Public Teachers' Support Group

Others who are on ED are willing to assist you.

Contact the ATA Local #38 for information about the support group which meets regularly.

*ATA, Local #38
262-6616*

Date

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Situation / Steps To Take

Notes

20.Rehabilitation

- _____ ASEBP will likely have a rehabilitation counselor contact you.
- _____ Rehabilitation or accommodation employment may be arranged.

You should not sign release forms giving rehabilitation counselors access to any of your medical information. You may also contact a rehabilitation officer. Don't wait until the end of the two-year period. You must receive consent from ASEBP regarding and prior to any rehabilitative work.

21.Returning to Work

If your doctor indicates that you are ready to return to full or part-time work:

- _____ Notify CBE.
- _____ Your physician must write a letter stating to what extent you are able to resume your teaching duties.
- _____ Once you have returned to work, notify TRF, CPP, CBE Benefits and any others from which you are receiving ED benefits.

CBE may require you to see their physician and meet their accommodation requirements.

Be cautious of relinquishing your present teaching status unless part of an accommodation agreement. If you accept part-time employment it will effect benefits, pension etc.

22. ED Benefits Beyond Initial Two Years

To be eligible you have to be unable to perform any occupation for which you are or may become reasonably qualified by education, training or experience.

- _____ Apply to ASEBP.
- _____ Your physician's statement must include a description of your disabling condition, extent and severity of condition, restrictions imposed, how they prevent you from performing **any** occupation.

As this is a medical decision the CBE cannot intercede on your behalf.

It is helpful if your physician states that you are unable to work. You will likely need report(s) from your specialist(s).

Date	√	Situation / Steps To Take	Notes
_____		23. CBE Sick Leave Extensions	
		Check with CBE Occupational Health as to procedure regarding extensions.	
_____		24. Employee Benefits Assistance	
	_____	Check with Employee Benefits to see if there is anything else you need to do.	<i>You must keep your benefit premiums up to date.</i>
	_____	Once you have been approved past the first two years, check annually for any changes in policy or additional things, which must be done.	

Remember

Each case is unique and the steps and procedures to be taken will vary and they are your responsibility.

This document is only intended as a guide. It has been compiled by the Calgary Public Teachers' ED Support Group.

For more information about this group and if you want to speak to someone with experience, contact the ATA, Local #38 at 262-6616.

Confidentiality will be respected.

*** ED refers to teachers on Extended Disability or previously on Long Term Disability.**