



Center for Health

# CPP Roles and Responsibilities

Conference Forum 2016



General Board

**Pension and Health Benefits**

*Caring For Those Who Serve*

# Agenda

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- Comprehensive Protection Plan (CPP)  
Disability Application Process
- Return-to-Work (RTW) Process
- Additional Welfare Benefits

# Medical (Incapacity) Leave ≠ Disability Benefits

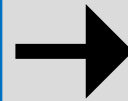
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Eligibility for medical leave *does not* equal long-term disability (LTD) claim approval

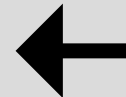
- **Medical leave:** Employment status and relationship with the annual conference
- **CPP disability:** Welfare benefit claim determination
  - Liberty Mutual determines LTD claim approval based on medical forms received

# LTD Application Process

- Participant form (*Form A*)
- Conference form (*Form C*)
- Grant form (*Form F*)



**Participant form**



Begins adjudication process

# How Can You Help?

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## **District Superintendents (DS)**

- Assist with obtaining disability forms
- Confer with Joint Committee on Clergy Medical Leave (Joint Committee)
- Submit letter to General Board and Joint Committee supporting medical leave (if applicable)

# How Can You Help?

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## Conference Benefits Officer

- Verify clergy eligibility in CPP
- Provide disability forms to clergy or district superintendent
- Complete *Form F* based on conference policy
- Submit completed paperwork to General Board

# How Can You Help?

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## Conference Board of Pensions

- Set conference grant policy
  - Amount of grant
  - Duration of grant
  - Reimbursement (if applicable)
- Establish policy regarding other benefits
  - Medical insurance
  - Moving expenses

# How Can You Help?

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## **Joint Committee on Clergy Medical Leave**

- Confer with DS on clergy status
- Make recommendations to Board of Ordained Ministry regarding status of medical leave
- Assist CBO and DS in contacting clergy to follow up on medical information
- Aid CBO and DS with transitional needs of clergy (i.e., secure housing, transportation, pastoral care)



# LTD Claim Adjudication

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**Timeline—25-day turnaround  
from date Liberty Mutual receives forms**

- Delays due to lack of medical information
- Liberty Mutual will provide written notice to claimant and CBO

# Claim Adjudication Process

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## **Proof of claim—60 days**

- Step approach in obtaining medical data from treating providers
- Determination made after 60 days based on medical data received to date

# Application Determination

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## Approvals

- Effective date is 1<sup>st</sup> of the month following last day paid
  - Plan will reimburse conference for grant
- Liberty Mutual will conduct ongoing reviews of claim

## Denials

- Appeal claim denial within 90 days
  - Initial appeal
  - Intermediate appeal
  - Final appeal

# How Can You Help?

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## **Conference Benefits Officer**

- Receive claim updates from Liberty Mutual
- Keep Joint Committee and DS apprised of change in clergy disability status

# How Can You Help?

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## Joint Committee on Clergy Medical Leave

- Provide continuing ministry to clergy and assist with maintaining fellowship with members of the conference
  - Committee members visit clergy at least once/year
  - Committee members call clergy at least twice/year
  - Identify if and when “extra” assistance is needed by clergy (i.e., transportation needs to/from doctors, pastoral care, etc.)
- Keep records of all visits and communications

# Return-to-Work Overview

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- Claimants with doctor's release for any type of part-time work
- Participant disincentive (10%) for refusal to participate in approved RTW plan
- Conference incentive (grant)
  - Up to **the lesser of** 40% of DAC\* or 50% of pre-disability compensation reimbursement credited to conference account
  - Conference to monitor participant's RTW compliance

\* DAC: Denominational average compensation

# Return-to-Work Program—Process

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<b>Step 1</b>	Participant receives medical release from own attending physician for any level of part-time work
<b>Step 2</b>	Liberty Mutual verifies participant's work restrictions and limitations ("R&Ls")
<b>Step 3</b>	Liberty Mutual notifies participant that his/her physician provided medical release for part-time work
<b>Step 4</b>	General Board and conference review participant's R&Ls <ul style="list-style-type: none"><li>• Identify potential transitional position</li></ul>

# Return-to-Work Program—Process

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<b>Step 5</b>	Conference sends transitional position recommendation to General Board and Liberty Mutual
<b>Step 6</b>	<p>Liberty Mutual reviews recommended transitional position and duties</p> <ul style="list-style-type: none"><li>• Ensures position aligns with participant's R&amp;Ls</li><li>• Completes Transitional Position Plan Form</li></ul>
<b>Step 7</b>	Liberty Mutual notifies participant, presents RTW plan
<b>Step 8</b>	Conference monitors participant's progress and compliance with the RTW plan



# Return-to-Work Program— Liberty Mutual

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<b>Step 7a</b>	If a transitional position is <i>not</i> identified by the conference, Liberty Mutual will begin process of identifying a transitional position outside the Church
<b>Step 8a</b>	Liberty Mutual will create and present RTW Transitional Plan
<b>Step 9a</b>	Liberty Mutual will monitor participant's compliance

**Note: The conference will not be reimbursed for any salary paid for a position identified by Liberty Mutual**

# Return-to-Work Program—Process

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<b>Step 10</b>	Conference notifies Liberty Mutual every 3 months of any compensation (salary or wages) paid <ul style="list-style-type: none"><li>• Via e-mail or with paystubs</li></ul>
<b>Step 11</b>	RTW program <ul style="list-style-type: none"><li>• Maximum: 12 months</li></ul>

## Next Step

### Attending physician recommendation:

- Release participant to full-time work, or
- Keep participant on CPP disability

Function	Reduced Hours	Reduced Stress	Limited Standing	Limited Walking	Limited Lifting	Limited Driving
Hospital visitation	✓		✓	✓	✓	
Nursing home visits	✓		✓	✓	✓	
Telephone calls to shut ins	✓	✓	✓	✓	✓	✓
Send cards to shut ins	✓	✓	✓	✓	✓	✓
Update church websites	✓	✓	✓	✓	✓	✓
Review church policies/procedures	✓	✓	✓	✓	✓	✓
Assist with bulletin/newsletter	✓	✓	✓	✓	✓	✓
Assist with church office work	✓	✓	✓	✓	✓	✓
Grief/pre-marital counseling	✓		✓	✓	✓	✓*
Teach Bible study	✓	✓	✓	✓	✓	✓*
Tutoring/mentoring	✓	✓	✓	✓	✓	✓*
Food bank volunteer	✓	✓	✓	✓	✓	✓*
Homeless shelter volunteer	✓		✓	✓	✓	✓*
Nursing home volunteer	✓	✓	✓	✓	✓	✓*
After school program assistance	✓	✓	✓	✓	✓	✓*
Halfway house volunteer	✓		✓	✓	✓	✓*
Hospice volunteer	✓		✓	✓	✓	✓*
YMCA after school program	✓	✓	✓	✓	✓	✓*
Speaker—church groups/auxiliary	✓	✓	✓	✓	✓	✓*
Speaker—community groups	✓	✓	✓	✓	✓	✓*
Interfaith hospitality network	✓	✓	✓	✓	✓	✓*

\* Limited; may be required to reach location of work

# How Can You Help?

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## District Superintendent

- Identify and outline specific duties for transitional position within clergy's restrictions and limitations (R&Ls)
  - Start/stop times, number of hours per week, work days, etc.
- Monitor clergy for compliance with transitional position; document any non-compliance
- Submit hours worked and compensation paid (if any) to CBO

# How Can You Help?

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## **Conference Benefits Officer**

- Participate in roundtable discussion with General Board and Liberty Mutual Return-to-Work (RTW) coordinator
- Act as liaison between General Board and DS
- Assist DS in coordination of transitional position

# How Can You Help?

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## Conference Benefits Officer

- Submit clergy's hours and paid compensation (if any) to General Board and Liberty Mutual
- Assist in documentation of any clergy non-compliance with the RTW Program
- Submit documentation for the Conference Grant

# How Can You Help?

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## **Joint Committee on Clergy Medical Leave**

- Assist DS and CBO in identifying and coordinating transitional position
- Aid clergy with transition back to work (i.e., assistance with accommodations, transportation needs, etc.)
- At end of RTW: evaluate medical leave status and make necessary recommendations to conference Board of Ordained Ministry



General Board

## **Pension and Health Benefits**

**Wespath**   
Investment Management