

RETURN TO WORK POLICY FOR NON-OCCUPATIONAL DISABILITY¹

1 INTRODUCTION

Matrix Solutions Inc. is committed to providing a safe return-to-work program with the goal of returning employees to their regular job duties as safely and as quickly as possible, while adhering to the advice provided by a medical doctor. The following outlines the process for supporting Matrix employees in their return to work following a non-occupational leave of absence due to disability.

2 PROCESS FOR RETURNING TO WORK

Following a period of leave due to disability, the Employee's Health Care Provider must complete a *Functional Abilities Form* (FAF) prior to the employee returning to work. The FAF document will either clear the employee for a full return to pre-disability job duties and regular working schedule, or will identify reduced functional abilities that may result in a recommendation of modified work (job duties), and/or a modified work schedule (hours).

If a modified return is medically recommended, the FAF will provide necessary details on the Employee's limitations, restrictions, and capabilities, that will inform the assessment of the impact to work and consideration of potential accommodation solutions to determine whether work accommodations can be made. If accommodation is possible, a formal *Individual Accommodation Plan* (IAP) that outlines the modified work program will be developed as outlined in the next section.

3 PROCESS FOR MODIFIED WORK AND DISABILITY-RELATED ACCOMMODATION REQUESTS

Modified work may include adjustments to:

- tasks, duties, or functions
- work schedule (e.g., hours of work)
- environment or work area
- tools and equipment

¹ Please refer to Section 20 of the *Health and Safety Manual* for [Return to Work Process for Occupational Injuries](#)

Modified work needs to be:

- **Safe** – the modified work plan will not jeopardize the safety of the Employee or others
- **Achievable** – modified duties offered will reflect work capabilities and restrictions outlined by the Health Care Provider
- **Reasonable** – modified duties will respect the individual’s dignity and provide meaningful contribution to the organization

Where there is a disability that impacts the Employee’s ability to perform his or her job, the Employee should contact his or her Leader or Human Resources Business Partner (HRBP) to discuss the need for accommodation.

The Employee will be asked to have his or her treating physician complete a *Functional Abilities Form (FAF)* which will provide information regarding limitations, restrictions, and capabilities, so that applicable restrictions can be observed, and reasonable accommodation measures considered.

If accommodation is possible, a formal *Individual Accommodation Plan (IAP)* that outlines the modified work program will be developed by the HRBP, together and in consultation with the Employee’s Health Care Provider to ensure consistency with medical restrictions, Benefit Provider RBC (where applicable), the Employee, and the Leader. The [Accommodation for Employees with a Disability](#) procedure will be followed to ensure a consistent approach for developing and documenting the accommodation plan or modified work program.

Employees offered modified work through a return-to-work or disability-related accommodation request will be required to participate in the modified work plan and are expected to attend treatment, appointments, and ongoing assessment as required, or as recommended by their Health Care Provider. The IAP will be regularly monitored and evaluated. A revised IAP will be prepared by Matrix and presented to the Employee after each change to medical restrictions.

4 PRIVACY AND CONFIDENTIALITY

Employees have a right to privacy regarding their medical and personal information. Requests for medical and personal information will be restricted to information that pertains to the need for accommodation and any limitations, restrictions, or capabilities. All medical and personal information is kept in strict confidence and will only be shared with necessary persons on a need to know basis.

The requested information may include:

- restrictions, limitations, and capabilities
- prognosis and expected length of recovery
- whether treatment or medication will affect the ability to perform job duties in a safe and satisfactory manner
- re-assessment schedule

5 ROLES AND RESPONSIBILITIES

The accommodation process is a shared responsibility. The Employee, Leader, HRBP, Health Care Provider, and the Benefit Disability Provider RBC (where applicable), should cooperatively engage in the process, share information, and be open to potential accommodation solutions.

5.1 The Employee

The Employee with a disability requiring accommodation is responsible for:

- advising Matrix that a disability exists
- advising Matrix of needs pertaining to the disability
- answering questions from Matrix regarding limitations, restrictions, and capabilities
- providing sufficient medical information to facilitate the accommodation process by ensuring that his/her health provider completes relevant documentation
- cooperatively engaging and being an active participant in the accommodation process
- accepting reasonable accommodation
- attending treatment, appointments, and ongoing assessment as required
- maintaining communication throughout the accommodation period and notifying parties if capabilities change at any time

5.2 Matrix

The Human Resources Business Partner and the Leader are responsible for:

- recognizing the need for accommodation
- ensuring privacy and confidentiality is maintained to the greatest extent possible
- requesting relevant information and assessing needs to identify appropriate accommodation and employment congruent with the Employee's abilities
- developing a return-to-work *Individual Accommodation Plan* (IAP) with input from the employee's Health Care Provider, Benefit Disability Provider RBC (where applicable), and the Employee
- monitoring the plan/program and regularly following up with the Employee

5.3 Health Care Providers

Health Care Providers are responsible for:

- diagnosing and treating injuries and illnesses
- supporting the return-to-work process by providing input and completing relevant documentation that identifies limitations, restrictions, and capabilities
- providing ongoing monitoring, treatment, and support, and adjusting restrictions as the Employee's condition changes

5.4 Benefit Disability Provider Advisors

Where applicable, through the disability program/plan, RBC Advisors are responsible for:

- facilitating the return to work process by assessing and providing input on recommended treatment and accommodation plans
- providing wage loss benefits should the Employee qualify under disability plan provisions
- providing case management services to monitor the Employee's recovery and return-to-work program

6 CLOSURE

The formal IAP will be closed once the Employee is able to return to all pre-disability job duties and schedule, or transfers to an alternate position consistent with their capabilities.