Disability Return to Work - Add Record Procedure

Summary

This procedure explains how to manually create the Disability Return to Work Data Collection for submission using the Add Record procedure via Employer Access.

Steps

The procedure is as follows:

1. Navigate to the **Left-hand Tool Bar.**
   a. Click the **Business Functions** (graph) icon.
   b. Click **Data Collections**.
   c. Click **Create Data Collection**.
   d. Complete the following fields in the **1. Definition** tab:
      - **Data Type:** Determines the type of workflow (e.g., **Disability Return to Work**)
      - **Partner Code:** This field will be pre-populated for your convenience.
      - **Start Date**
      - **End Date**
      - **Data Collection Name:** For record-keeping purposes, we recommend naming the Data Collection with the following information:
        Partner #-[data collection type]_[current date] – Member first and last name – Member ID
   e. Click **Save and Continue**.

2. Click **Add Record** to create the Disability Return to Work Data Collection manually.

   a. Complete the following fields in the **2. Add Member Data** tab:
      - Items with an asterisk are mandatory.
      - Enter:
        - Member Information
          - **Social Security Number**
          - **Member Id (optional)**
          - **First Name**
          - **Last Name**

- Employment Information
  - **Return to Work Type**
    - Select applicable type:
      - Trial Work Period
      - Light Duty
      - Full release
        (See chart below)

Data Collection Code	Description	Details
TRIAL	Trial Work Period	Member has returned to work on trial basis; the member is working a reduced or modified schedule in terms of work hours or days per week.
LIGHT	Light Duty Period	Member returned to work on a light duty basis; the member is working normal/ full hours working hours but has medical restrictions.
FULL	Full Release	Full release to return to work

- **Return to Work Date** – Must be on or before today's date.

  Trial Work – **if this is selected, these fields MUST be entered. Please see additional information regarding the "Trial Work" fields at the end of this procedure.**
  - **Period Start Date**
  - **Period End Date**
  - **Hours Worked**
  - **Non-Worked Hours with Earnings**
  - **Gross Hourly Pay Rate**
  b. Click **Save**.

3. Click **Add Record** to enter your next member, repeat instructions in step 2 until all members are entered.

4. Click **Validate** to begin the validation process in the **3. Validate Member Data** tab. In this step, data is validated against formatting and business requirements. Respond to the errors and/or warnings and close the **Member Summary**. Once all exceptions have been resolved, click **Continue**.

   a. Errors will show in **RED**, and warnings will show in **ORANGE**, with the total number of issues for each member. On the right-hand side of your screen, you have the option to check the box for the specific error/warning to view the members that were impacted as such. This allows you to filter by error/warning.

   b. **To respond to an ERROR,** click the row of the member's name to highlight and open the Member Summary to the right.
      - Click **View Member Data** to make any necessary changes and corrections. After the correction is made, click **Save and Validate**.
      - Click **Postpone Member** to save the member in a Data Collection to be submitted later. In the pop-up window, enter an explanation regarding the reason why the member is being postponed, then click **Save**.
      - Click **Reject Member** to remove the member from the data collection. In the pop-up window, enter an explanation regarding the reason why the member is being rejected, then click **Save**.

   c. **To respond to a WARNING**, click the row of the member's name to highlight and open the Member Summary to the right. You then will need to complete one of the four options below to address the warning.
      - Click **View Member Data** to make any necessary changes and corrections. After the correction is made, click **Save and Validate**.
      - Click **Approve Warning.** In the pop-up window, click the drop-down arrow to indicate a reason to approve the warning. Click **Save.**
      - Click **Postpone Member** to save the member in a Data Collection to be submitted later. In the pop-up window, enter an explanation regarding the reason why the member is being postponed, then click **Save**.
      - Click **Reject Member** to remove the member from the data collection. In the pop-up window, enter an explanation regarding the reason why the member is being rejected, then click **Save**.

5. From the **4. Review & Submit** tab review the listed Data Collection, Data Entry Summary and Reports. Once review is complete, click **Submit** to finalize filing the data collection.

6. To formally close a disability claim, IMRF requests a copy of the physician's release. Most often, the release is a simple statement from the doctor written on their script notepad and includes a signature. To send IMRF a copy of the physician's release, click the envelope icon on the left toolbar to send a secure message.
   a. Select **Disability** as the topic.
   b. Provide the **member's name and member ID number**.
   c. Attach the copy of the physician's release.

This procedure is complete.

<u>TRIAL WORK PROCEDURE</u>

For members who are on disability leave and are returning to work on a Trial Work basis, employers will need to submit two data collections:

(1) At the beginning of the month up to the trial work start date – REPORT 0 hours in the "Hours Worked" field.
(2) At the end of the month, the employer will receive a member event request to submit the return-to-work hours.
   a. For example, if a member returns to work on a trial basis effective 12/13/2023, the employer will submit a data collection with the following information:
      i. Period Start Date: 12-01-2023
      ii. Period End Date: 12-12-2023
      iii. Hours Worked, Non-Worked Hours with Earnings, and Gross Hourly Pay Rate: 0.00
   b. At the end of the month, the employer will receive a return-to-work member event request and they will then submit another data collection with the following information:
      i. Period Start Date: 12-13-2023
      ii. Period End Date: 12-31-2023
      iii. Hours Worked, Non-Worked Hours with Earnings, and Gross Hourly Pay Rate: actual information should be entered in these fields
(3) Once the initial Trial Work data collection is submitted, the employer will receive a Member Event request to report subsequent hours worked. The employer will receive this following each time they submit the trial work hours until they report that the member had a Full Release to work.