

Western North Carolina 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 ¶356, *The 2016 Book of Discipline*.

The Western North Carolina Conference Joint Committee on Medical Leave (henceforth referred to as JCML), consisting of members and staff from the Conference Board of Ordained Ministry, the Board of Pensions and Health Benefits, Inc. of Western North Carolina of the United Methodist Church (henceforth subsequently known as BOP) and the Cabinet, is responsible for the process of reviewing requests for Medical Leave. Approval for Disability Benefits occurs exclusively through Wespath Benefits | Investments and Liberty Mutual, coordinated by the conference office of pension and health benefits (located within Treasury Services).

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 Western North Carolina Board of Pensions, and by a majority vote of the executive session of clergy members in full connection, a clergy member may be granted annual medical leave without losing their relationship to the annual conference.
- 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 in order 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 must submit the application for a change in relationship to his/her District Superintendent and the Board of Ordained Ministry through the director of ministerial services (conference secretary). The application is available on the conference website.
2. To request an application for disability benefits, the clergy applicant must contact his/her District Superintendent or the benefits administrator in WNC Treasury Services.
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 Wespith permission to ask for additional medical documentation.

Once these forms have been received by Wespith, a claim will be opened. 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. Once the request for medical leave is received, the Office of Ministerial Services will notify the Board of Ordained Ministry and the Joint Committee on Medical Leave.
5. The Western North Carolina Conference JCML will review the request for change in relationship to Medical Leave.
6. If the clergy applicant is granted disability income benefits, the JCML will recommend the relationship change of Medical Leave. Approval will be required by the Board of Ordained Ministry and the conference board of pensions. The executive session of the clergy will consider the relationship change at annual conference.
7. If the clergy applicant is denied disability income benefits (even as the appeal process is being pursued),

- i. The clergy applicant may continue to request medical leave, or voluntary personal leave of absence, or continue in appointment.
 - ii. The clergy applicant requesting medical leave will be interviewed by the JCML which makes a recommendation to the Board of Ordained Ministry. 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.
 - iii. Once medical leave is granted, the cabinet and clergy, in consultation with the local church, will agree upon an effective date.
8. Between sessions of the annual conference, after review by the JCML and with the approval of a majority of the district superintendents, after consultation with the executive committee of the Conference Board of Ordained Ministry and the BOP, medical leave may be granted by the bishop for the remainder of the conference year.
 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 Western North Carolina Board of Pensions and Health Benefits.

PROCESS FOR COMING OFF MEDICAL LEAVE

When approval by Wespath to continue on medical leave ends

- Approval for disability income is reviewed annually, a process administered 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, to return to an appointment, or to continue the relationship of medical leave with no disability income.

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, director of ministerial services (conference secretary), and treasury services.
- More information about retirement can be found in *The 2016 Book of Discipline* in ¶1357.

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 ¶1353.
- The process to request honorable location can be found in *The 2016 Book of Discipline* in ¶1358.
- Further information can be obtained by calling the Office of Ministerial Services (conference secretary).

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 WNC Conference Board of Ordained Ministry, providing medical evidence that the clergy person has recovered sufficiently to resume ministerial work (*The 2016 Book of Discipline*, ¶356.3). 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.

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