CHECK OUT THE COMMUNICATIONS GUIDELINES FOR THE FIRST CONTACT CALLS FOR BEST PRACTICE TIPS.

I \IPORTANT A first contact call or secure message with the health care provider may not be ıired at the start of all claims. Often, the worker will go directly to a service ⁄ider through direct access. However, in some cases, such as when a service ⁄ider is new to you, or if you expect significant return-to-work barriers in a claim, ay be beneficial to contact the provider early in the claim.

1. STARTING YOUR CALL: INTRODUCE YOURSELF

- ✓ Introduce yourself as the case worker for the claim.
- ✓ Outline your expectations of the provider and what your responsibility is as the case worker on the claim.
- ✓ Let the provider know how to contact you.
  - Promote the use of WCB Online to complete forms and to communicate regularly online. Refer them to the website and Working to Well for more information
  - Share your phone number
  - Let the provider know if you work modified hours

SCRIPTED STATEMENTS

These are helpful prepared statements that show empathy, use plain language and help to develop a relationship with the customer.

– I want you to know we're here to help.

– You play an important role in a worker's safe and timely return to work.

– To make this happen, the whole team – WCB, the worker, the employer, and health service providers – must work closely together.

FIRST CALL GUIDE

HEALTH CARE PROVIDERS

Use this guide to plan the questions to ask during your first contact with the health care provider. You'll find a list of questions you need to ask in order to gather information about the worker and their injury. You'll also see questions to consider as part of your conversation. **Capture this information in Guidewire or your Contact Sheet.**

Introduce your return to work assistant, their role, and when they may hear from them.

If you have an upcoming absence planed, inform the provider and let them know who to contact in your absence.

2. DISCUSS PROGRESS AND RETURN TO WORK

?

Ask about the health service provider's perception of the worker's mindset and motivation to returm to work based on the provider's interactions to date.

TIP

Concerns may signal the need for an earlier case conference, work site visit or other interventions.

1. Ask the provider about how they see return-to-work plans unfolding. Do they see return to work within the Disability Duration Guideline as a reasonable goal?
2. Ask about the expected treatment plan.

This is your opportunity to align on specifics of the plan and ask clarifying questions. Ensure the plan aligns with your expectations and WCB policy. Raise any concerns you may have, or write them down to compare against the policy after the call.

3. SET EXPECTATIONS AND OUTLINE NEXT STEPS

Setting common expectations is key to good customer service. Clearly communicate reasonable and achievable expectations to help to meet and exceed customer expectations.

?

Ask the provider to ensure they notify you any time an appointment is missed.

?

Discuss whether there is a likelihood that a case conference will be required at the four-week mark. If possible, inquire about their ability to attend a case conference and indicate that you will follow up with details once you speak with the worker and employer.

TIP

Play the lead role in initiating and coordinating the case conference. This sets the expectations that you will be leading the case conference when it takes place.

1. Clearly outline what you plan to do in the next 1-2 weeks on the claim. Highlight specific actions you will take as the case worker.
2. Let them know what you expect of health care provider in the next two weeks.
3. Confirm their understanding of the next steps.
4. Thank them for their time.

CHECK OUT THE COMMUNICATIONS GUIDELINES FOR THE FIRST CONTACT CALLS FOR BEST PRACTICE TIPS.

1. STARTING YOUR CALL: INTRODUCE YOURSELF

- ✔ Introduce yourself as the case worker for the claim.
- ✔ Tell the employer that you are here to support them and the injured worker, and with everyone working together, we will help the worker to recover and return to work in a safe and timely manner.
- ✔ Explain the reason for the call: to introduce yourself, to share information, and to answer any questions they may have.
- ✔ Be mindful of busy schedules. Let the employer know how long you are planning the call to take. Ask them if it is a convenient time to speak or if they would like to schedule a different time.
- ✔ Tell the employer that they may wish to write things down and allow them to prepare to do so.

SCRIPTED STATEMENTS

These are helpful prepared statements that show empathy, use plain language and help to develop a relationship with the customer.

- I want you to know we're here to help.
- We are part of a team that includes you, your worker and the health care providers. We will all work together to get the worker back to work.
- You play an important role in supporting a worker through their recovery and return to work.

FIRST CALL GUIDE
EMPLOYER

Use this guide to plan the questions to ask during your first contact with the employer. You'll find a list of questions you need to ask in order to gather information about the worker and their injury. You'll also see questions to consider as part of your conversation.

Capture this information in Guidewire or your Contact Sheet.

2. GET THE EMPLOYER'S STORY AND BUILD RAPPORT

It is important to assess the employer's understanding of the situation and the factors that led to the injury. This will help you as you review the information received from the worker and health care provider. Use empathy to achieve and convey an understanding of the employer's circumstances and motivations.

Can you tell me what happened the day of the injury?

Ask the employer about what contact they have had with the injured worker. This may include who they spoke to and what was discussed. If no contact has occurred, inquire as to why.

If appropriate to discuss at this point, ask about the worker's history with the organization.

- How long has the worker been employed with the organization?
- Is there anything about the worker's relationship to the organization that could positively or negatively impact their return to work (e.g. recent layoffs, employee under performance management, etc.).

SCRIPTED STATEMENTS

- The better I can understand what happened, the better support I can provide in helping the worker recover and get back to work.
- Helping your worker stay connected to the workplace will support their recovery and timely return to work.
- A successful return to work journey depends on teamwork. As a supervisor or manager, you are an important part of that team.

TIP This can be an important indicator of potential return-to-work barriers related to job satisfaction or workplace relationships.

3. CLAIM ACCEPTANCE AND ENTITLEMENTS

If the claim has been accepted, this is an opportunity to clearly articulate the type of benefits that have been approved and answer any questions the employer may have.

If the claim is pending, this is your opportunity to gather any additional information that you need about the incident and ensure they understand the next steps. Avoid using technical terms or jargon around claim acceptance during this time.

If the employer has never had a claim before or has limited experience with claims (this could be a small/medium employer), be sure to take extra time to explain the claims process and clearly outline the next steps.

ACCEPTED CLAIMS

- ✔ Outline the details of the benefits and the claim acceptance to the employer using plain language.
- ✔ Ask the employer if they understand or have any questions about what the claim has been accepted for.

Discuss any relevant information elements, including:

- Date of initial time loss
- Worker's employment type, wage info, work hours, duration of employment
- Whether the employer will be paying for transitional duties
- Whether the employer will continue to pay benefits
- Benefits to keeping the worker connected to work
- Case conference expectations

- ✔ Inform the employer of MyAccount, especially the use of secure message for ongoing communication about the claim.

PENDING CLAIMS

✔ If the claim is still pending, let the employer know why.

- Outline the next steps and timelines.
- Gather any additional information that is required to complete the entitlement decision.

4. RETURN TO WORK AND MODIFIED / TRANSITIONAL DUTIES

Transitional duties play a very important role in a worker's recovery process. They serve as a temporary bridge until the worker can safely return to their original duties. They become an integral part of the treatment plan. Transitional duties are meant to increase as the worker's abilities improve through their recovery. Small/medium employers will likely require more assistance in identifying transitional duties and understanding their importance.

? If the worker is already carrying out modified or transitional duties, ask the employer to describe how this is going. Ask if the employer has any concerns about the worker's ability to return to work.

TIP Concerns may signal the need for an occupational therapist to conduct an on-site visit and assessment, or to leverage Relationship Manager or Workplace Consultant services to help improve the employer's return-towork program and plans.

? If the worker has not returned to work in any capacity, discuss transitional duties with the employer and ask them to identify modified or transitional duties the worker could perform while recovering. If the employer cannot identify any, indicate that you will request a functional job analysis. Position transitional duties as the expectation, not an option.

- You may need to explain the value of transitional duties and how to identify them in the workplace. Planning transitional duties is the process of determining work tasks that can be provided to an injured worker during their recovery. The physical demands of the job tasks must be known and must not exceed the physical ability of the worker.
- Ask about other opportunities for how the worker could stay connected to the workplace.
- Be understanding that small and medium employers may find it more challenging to identify possible transitional duties.

Staying connected to the workplace is a key success factor in ensuring successful return to work. Options could include staff meetings, safety meetings, training, events, coffee breaks, lunches, etc.

? If the worker has returned to work in a modified capacity and is receiving services, note that you will follow-up with the service provider(s) associated with the claim for an update.

- Be specific. Let them know who you will follow-up with and when they can expect to receive an update.

Remind the employer of the following if relevant:

- Physiotherapy should be done outside of work hours
- Importance of attendance
- Use of WCB website and Working to Well

SCRIPTED STATEMENTS

- The longer workers are off work, the less likely they are to return. So, when an injury does occur, it is important to begin RTW planning on Day 1. The best result for everyone is safe and timely return to work.
- It's important to understand that the worker may not be able to perform all tasks associated with their job – this is normal.
- It's important to understand that everyone heals differently and that it may take some workers longer than others to recover.

5. SET EXPECTATIONS AND OUTLINE NEXT STEPS

Setting common expectations is key to good customer service. Clearly communicate reasonable and achievable expectations to help to meet and exceed customer expectations.

- ✓ Clearly outline what you plan to do in the next 1-2 weeks on the claim. Highlight specific actions you will take as the case worker.
- ✓ Let them know what you expect of the employer in the next two weeks.
- ✓ Confirm their understanding of the next steps.
- ✓ Encourage the employer to stay in contact with the worker. Examples of ways they can do this include:
  - Maintain regular phone or email contact with the worker.
  - Reach out regularly just to see how they are doing and to offer support.
  - Given them brief updates about what is happening at the workplace.
  - Keep them aware of any work related social activities they may be able to safely participate in.

SCRIPTED STATEMENTS

- I want to make sure you have a clear understanding of what is going to happen next.
- Do you feel comfortable with the next steps?
- I encourage you to stay in touch with the worker, to keep them connected to their organization and make them feel confident and valued.

6. LET THE EMPLOYER KNOW HOW TO GET IN TOUCH

- ✓ Let the employer know how to contact you.
  - Promote the use of MyAccount and secure messaging and encourage them to sign up
  - Provide your phone number
  - Provide the 1-800 number and encourage them to call if they cannot reach you right away
  - Refer them to the website and Working to Well for more information
  - Provide your hours of work and which days you are out of the office due to modified days.
- ✓ Introduce your return to work assistant, what their role is, and when they may hear from them.
- ✓ If you have an upcoming absence planed, inform the employer and let them know who to contact in your absence.
- ✓ Let the employer know you are looking forward to working with them to help get the injured worker back to work.
  Thank them for their time.

SCRIPTED STATEMENTS

- I look forward to supporting this claim and helping the worker recover and return to work
- Please contact me if you have any questions or concerns you would like to discuss.

CHECK OUT THE COMMUNICATIONS GUIDELINES FOR THE FIRST CONTACT CALLS FOR BEST PRACTICE TIPS.

1. STARTING YOUR CALL: INTRODUCE YOURSELF

- ✓ Introduce yourself as the worker's case worker.
- ✓ Tell the worker that you are here to support them and that by working together, you will help them to recover and return to work.
- ✓ Explain the reason for your call: to introduce yourself, share some information, see how they are doing and answer any questions they may have.
- ✓ Let the worker know how long you are planning the call to take. Ask them if it is a convenient time to speak or if they would like to schedule a different time.
- ✓ Tell the worker that they may wish to write things down and allow them to prepare to do so.

SCRIPTED STATEMENTS

These are helpful prepared statements that show empathy, use plain language and help to develop a relationship with the customer.

- I'm sorry to hear you've been injured.
- I'm here to support you and help you return to work.
- I want you to know we're here to help.
- We are part of a team that includes you, your employer and your health care providers. We will all work together to help you get back to work.
- Wherever we can, we will provide support along your path to recovery and well-being.

FIRST CALL GUIDE
WORKER

WORKING TO WELL

Use this guide to plan the questions to ask during your first contact with the worker. You'll find a list of questions you need to ask in order to gather information about the worker and their injury. You'll also see questions to consider as part of your conversation. **Capture this information in Guidewire or your Contact Sheet.**

2: GET THE WORKER'S STORY AND BUILD RAPPORT

It is important to assess the worker's understanding of the situation and their injury. This will help you as you review the information received from the employer and health care provider. It is critical to demonstrate empathy during this time, as it can be very difficult for the worker to recall their injury. Use empathy to achieve and convey a deep understanding of the customer's circumstances and motivations.

? How are you feeling in general since your injury?

TIP If the worker indicates that their condition has worsened since the injury (particularly if the injury is a sprain/strain that is no longer acute), this may be an indication that they are experiencing additional stress, anxiety or psychological barriers. This may help you to understand potential RTW barriers and include items in your action plan to address them, such as discussing them with the worker's health care providers.

? Can you tell me what happened the day of the incident/accident?

If appropriate to discuss at this point, ask the worker when they feel that they could return to work.

? **What is the worker's stated** return- to-work date?

TIP This can be an important indicator regarding the mindset of the worker. If the worker's return to work date drastically exceeds their DDG or other indicators, try to understand why. This will allow you to understand potential RTW barriers (e.g. family physician is suggesting long period away from work) and include items to address them in your action plan.

? Ask the worker about what contact they have had with their workplace. This may include who they spoke to and what was discussed. If no contact has occurred, inquire as to why.

If appropriate to discuss at this point, ask the worker about their job and workplace. Consider questions such as:

- I am hoping to find out a little more information about your workplace experience, some of these questions may seem strange but they are designed to help me support you.
- Would you say that you enjoy your job?
- What do you like or dislike about your workplace?
- Do you get along well with your coworkers? Do you have any good friends at work?
- How would you describe your relationship with your boss?

SCRIPTED STATEMENTS

- I understand that it can be difficult to talk about your injury.
- The better I can understand what happened and how you are doing, the better support I can provide in helping you recover and get back to work.
- Staying active, productive and connected to your workplace can help you recover faster

? Worker's workplace satisfaction?

TIP This can be an important indicator of potential return-to-work barriers related to job satisfaction or workplace relationships.

If appropriate, ask about modified or transitional duties the worker could perform while recovering. If this is not possible, encourage them to stay connected to their workplace in other ways (by phone, email, periodic visits, coffee breaks, etc.).

TIP Staying connected to the workplace is a key success factor in ensuring successful RTW. Options could include staff meetings, safety meetings, training, events, coffee breaks, lunches, etc.

3. CLAIM ACCEPTANCE AND ENTITLEMENTS

This is an opportunity to help the worker understand the status of their claim and next steps. Avoid using technical terms or jargon around claim acceptance during this time.

– If the claim has been accepted, review the scope of what's covered with the injury (compensability).

– If the claim is pending, answer any questions the worker may have about next steps to ease anxiety and ensure they have clear expectations on next steps.

ACCEPTED CLAIMS

✔ Outline the benefits and services the worker is entitled to. Be sure to use plain language.
- Ask the worker if they understand or have any questions about their benefits.
- Clarify what supports the worker may be entitled to, including physiotherapy, travel expenses, time loss benefits, etc.
- Clarify timelines for time loss benefits if applicable.

✔ Ask the worker to clarify what medical treatment they have received.
- If the worker is not being supported by a health care provider, tell them that you have made or will be making a referral to a physio clinic and that they will have access soon.

✔ Inform the worker of WCB Online and the option for direct deposit. Encourage them to use WCB Online to stay connected to you and to monitor their claim.

PENDING CLAIMS

✔ If the claim is still pending, let the employer know why.
- Outline the next steps and timelines.

TIP

Referral to a Health Care Provider

Have a conversation with the worker about convenient locations or clinics they have used in the past before referring them to an approved WCB clinic. Then, take the onus off of the worker to contact the provider by telling that worker that you will contact the clinic. By doing this, you are providing better customer service and removing a responsibility from them during a stressful time in their life.

SCRIPTED STATEMENTS

– I understand the uncertainty and anxiety, especially financially, that being off work can cause.

– I will do everything I can to help you receive timely access to the benefits you are entitled to.

– My job is to help take the worry of returning to work away by helping to look after your supports and benefits for you.

– We will help and support you as you recover so that you can focus on getting things back the way they were.

– We want to minimize the impact of your injury and get things back to the way they were, so you can enjoy the things that matter most in your life.

4. PAUSE AND ALLOW WORKER TO REFLECT

Acknowledge that you have shared a lot of information with them. Give the worker a chance to reflect and make sure they are comfortable with what has been discussed. Convey empathy and see the person first.

TIP

This can be an important indicator of potential return-to-work barriers related to the worker's support network. They may indicate that they need assistance with transportation and with getting to appointments (in which case, you could discuss options to cover taxi expenses). They may also discuss stressors in their personal life that could impact their return to work. Consider how to adjust their return-to-work plan to overcome these barriers, such as having flexibility for the timing of treatments.

- ✔ Ask the worker if they have any question at this point and provide a response. If you don't know the answer, let them know exactly when you will get back to them with a response, setting a reasonable expectation that you can meet or exceed.
- ✔ Address any concerns or barriers that they raise about return to work or beginning treatment.

? Ask the worker if they have a support network (e.g. friends, family, neighbours) that can help them during the recovery process. For example, do they have a way to get to appointments if they are unable to drive?

:

SCRIPTED STATEMENTS

- I understand that this is a lot of information. Don't worry about remembering everything or writing it down.
- You will receive a letter shortly that will include a lot of the information we have discussed. I can attach the letter to an online message if that works for you.
- If you ever have a question, you can call me but the quickest way to reach me is by sending a message online. If I'm not available, there are other people at WCB who are able to help you as well.
- There is also a lot of great information available on our website to help you understand what this process will be like.

5: SET EXPECTATIONS AND OUTLINE NEXT STEPS

Setting common expectations is key to good customer service. Clearly communicate reasonable and achievable expectations to help to meet and exceed customer expectations.

- ✔ Clearly outline what you plan to do in the next 1-2 weeks on their claim. Highlight specific actions you will take as their case worker.
- ✔ Let them know what you expect of the worker in the next two weeks.
- ✔ Confirm their understanding of the next steps.

SCRIPTED STATEMENTS

- I want to make sure you have a clear understanding of what is going to happen next.
- Do you feel comfortable with the next steps?
- Early and active participation in your treatment plan will help you heal and get back to your regular routines sooner.
- Please keep me informed of any changes to your plan, for example, if you happen to cancel or miss an appointment or if anything impacts your plans to return to work, such as a change at your workplace.

6. LET THE WORKER KNOW HOW TO GET IN TOUCH

- ✔ Let the worker know how to contact you.
  - Promote the use of WCB Online and secure messaging and encourage them to sign up.
  - Provide your phone number.
  - Provide the 1-800 number and encourage them to call if they cannot reach you right away.
  - Refer them to the website and Working to Well for more information.
  - Provide your hours of work and which days you are out of the office due to modified days.
- ✔ Introduce your return to work assistant, what their role is, and when the worker may hear from them.
- ✔ If you have an upcoming absence planned, inform the worker and let them know who to contact in your absence.
- ✔ Tell the worker you are looking forward to helping them in their recovery and getting back to work. Thank them for their time.

SCRIPTED STATEMENTS

- I look forward to supporting you as you recover.
- Please contact me if you have any questions or concerns you would like to discuss.

WORKING TO WELL

COMMUNICATION GUIDELINES

FIRST CONTACT CALLS

1. PREPARE AND PLAN FOR YOUR FIRST CONTACT CALL.

This is your opportunity to start building a relationship with the worker and employer involved in the claim. Review all information available on the claim file before making contact, and review the checklists for first contact to plan your call. Be sure to set aside enough time for the discussion, which will allow you to verify information on the file without feeling rushed, and shows the worker/employer that you care.

2. STAY COMPOSED AND REMEMBER THE CONTEXT.

This is can be an emotionally charged time for all involved – particularly the person who has been injured. Your role is to establish a relationship with the worker, demonstrate that WCB is here to help, educate and inform them about the process, and capture key information. You may be asked a question you are unable to answer: that's okay, just explain the steps you will take to find an answer and follow through on your commitment.

It's important to keep in mind the perspective of the worker and how they may be feeling: fearful, in pain, worried, and even angry. Expression of these emotions may make it challenging for you to facilitate a productive conversation. If this happens, be empathetic. Using a few empathetic statements can allow the worker to feel heard and enable you to move the conversation back towards your objectives. If this is not successful, document the conversation, and schedule another time in the near future (within the next two days if possible) to finish the discussion. Make sure your intentions of following up are clear to the caller and provide a timeline to help them understand when they can expect to hear from you again.

3. BE AN ACTIVE LISTENER.

Workers and employers should feel heard. Be an active listener. Acknowledge or repeat back what you are hearing and ask questions to confirm understanding, even if what's being said conflicts with information you have read on the claim file. This approach reflects that you are listening. It also helps you to validate and clarify information as you proceed and may help to identify return to work risk factors. Take notes, but ensure this doesn't cause long gaps or dead air in the conversation. If you need a minute, simply say, "Sorry if I'm silent for a few seconds, I'm just taking some notes while we talk."

4. DON'T UNDERESTIMATE THE POWER OF POSITIVE LANGUAGE

Using positive language can help relieve tension, especially when delivering news that may be perceived as negative.

- Avoid using "unfortunately"
- Avoid saying "it's not our responsibility to" instead try "I can direct you to the right resources for…"
- Use "What I can do is" instead of "I can't"
- Use "Here are your options" instead of "We don't do that"

5. ALWAYS MONITOR YOUR TONE.

It's important to control how you come across in any given conversation. What you say and how you say it matters. Tone helps to provide added emphasis, intent and emotion behind the words you are saying. If the topic is about a conflict or has the potential to be misunderstood, use your judgment in seeking peer or manager input if required. You may even want to practice your delivery of information with a peer or manager before you call the person to feel confident you are approaching the situation appropriately.

6. USE EMPATHETIC STATEMENTS WHERE APPROPRIATE.

Using empathic statements that reflect understanding and concern help customers feel heard. Try using variations of these:

- "I'm sorry to hear that"
- "I appreciate your patience"
- "I would be asking the same questions you are"
- "Thank you for remaining so positive"
- "Thank you for taking the time to speak with me today"
- "I think you will find it easier if you do x"
- "Thank you for sharing that information with me."
- "I can understand how you thought that"

7. TAKE CARE WITH INTERNAL JARGON AND ACRONYMS.

Don't use acronyms and avoid internal jargon to support clear, concise, courteous dialogue. Use plain language descriptions instead of internal terms whenever possible.

8. REFLECT, DOCUMENT, AND PLAN FURTHER.

Take a few minutes **immediately following the discussion** to finish your notes while the information is top-of-mind and to reflect on what you have heard. This is a good opportunity to compare what you have just heard with any information on the file, or any information gathered through other points of contact. Document key information and make your action plan.

CASE WORKER TRANSITION CHECKLIST

OUTGOING CASE WORKER

Use this document to help successfully transition one or multiple claims to another case worker. This checklist will help ensure the transition is consistent for workers and case workers, and will help ensure there is a consistent experience for all workers. The checklist should be reviewed by the case worker who is transitioning out of the claim file. It's meant to support your existing knowledge of the worker and the claim.

A SUCCESSFUL TRANSITION OF A CLAIM.

- ☑ Ensure documentation is current and accurate.
- ☑ Contact the worker.
- ☑ Communicate with incoming case worker.

1. ENSURE THE DOCUMENTATION IS CURRENT AND ACCURATE

☑ For **approved claims,** ensure the following is current and accurate

- **Scope of compensability** (Entitlement Decision)
- **TERB and Medical Aid** benefit details
- **Job Site Analysis** or **Job Description** (if no JSA, note in Action Plan)
- **Reason for transition** of the claim
- **Next steps** for the worker and claim
- Additional **biopsychosocial flags** that are relevant to the claim and RTW

☑ Ensure **all outstanding decisions** on the claim have been completed, documented and communicated to the worker and employer

☑ For **non-approved (pending, follow-up, shadow, etc.)** claims, ensure the following is current and accurate

☑ • Details in **Action Plan** outlining **next steps** to gather additional information required

☑ If transitioning to **LTB**, complete the EBU-LTB File Transfer Form

Add **follow-ups** in AS400 for incoming case worker indicating new claim and dates of any upcoming TERB payments

2. CONTACT THE WORKER

FOR TRANSITION OF A SINGLE CLAIM

☑ Contact the worker **by phone** to inform them of the change (refer to Case Worker Transition Q&As for messaging)

☑ Distribute **Case Worker Transition letter** through OLC or mail

☑ Ensure that letter is **attached to claim** to inform incoming Case Worker

- If you know who the incoming Case Worker will be, provide his/her name
- If the new Case Worker is not assigned, let the worker know that their new Case Worker will be identified soon
- In both cases, let the worker know that they can contact the 1-800 number at any time if they have questions or need support

FOR TRANSITION OF MULTIPLE CLAIMS OR ENTIRE CASELOAD, PRIORITIZE WHICH WORKERS WILL RECEIVE CALLS

- ☑ Consider calls for claims with **TERB, complex claims** (e.g. those requiring weekly communication) and others as deemed fit (e.g. strong relationship and rapport with worker
- ☑ For those not receiving calls, notify using a secure message through **OLC**
- ☑ Distribute **Case Worker Transition letter** through OLC or mail
- ☑ Ensure that letter is **attached to claim** to inform incoming Case Worker
- ☑ **Contact employer(s) and health service provider(s) through WCB Online securing messaging** (or phone if the employer does not use WCB Online) to notify them about the change in case worker and include Case Worker Transition letter

3. COMMUNICATE WITH INCOMING CASE WORKER

- ☑ Notify incoming Case Worker of any scheduled **Case Conferences**
- ☑ Share information about **Special Investigations Unit involvement in-person**
  - If transitioning to a **vacant** case load, **inform SIU**

CASE WORKER TRANSITION CHECKLIST

INCOMING CASE WORKER

Use this document to help successfully transition one or multiple claims to another case worker. This checklist will help ensure the transition is consistent for workers and case workers, and will help ensure there is a consistent experience for all workers. The checklist should be reviewed by the case worker new to the claim file. It's meant to support your existing knowledge of the worker and the claim.

A SUCCESSFUL TRANSITION OF A CLAIM.

- ☑ Review relevant documentation on claim.
- ☑ Contact the worker.
- ☑ Communicate with outgoing case worker.

1. ENSURE THE DOCUMENTATION IS CURRENT AND ACCURATE

For **approved claims**, review the following to understand claim

- **Scope of compensability** (Entitlement Decision)
- **TERB and Medical Aid** benefit details
- **Next steps** for the worker and the claim
- **Reason for the transition** of claim

☑ For **non-approved (pending, follow-up, shadow, etc.)** claims, review:

- Details in **Action Plan** outlining **next steps** to gather additional information required

2. CONTACT THE WORKER

☑ Contact the worker **by phone** for an introduction within five business day of receiving the claim

- For transition of multiple claims or entire **caseload, prioritize** which workers will receive calls first. Consider calls for claims with **TERB** or **complex claims** first.
- Introduce yourself as the worker's case worker and explain why you will be taking over the claim (refer to Q&As)
- Explain that you are working to get up to speed on their file. Acknowledge that they may find themselves having to occasionally repeat information they have already shared, but reinforce that you are committed to getting familiar with their claim as quickly as possible and have full access to all of the information their previous case worker gathered.
- Ask the worker for clarification on their injury, explaining that it's for your benefit. **"I know you've already discussed this with your previous case worker, but for my benefit, can you tell me what happened the day of the injury?"**
- If case conferences will be part of the RTW plan, explain to the worker that you will be having case conferences while you are supporting them
- Clearly outline what you plan to do in the next 1-2 weeks on their claim. Highlight specific actions you will take as their case worker.
- Let them know what you expect of them in the next two weeks.

- Confirm their understanding of the next steps.
- Let the worker know how to contact you.
  - Promote the use of WCB Online and secure messaging and encourage them to sign up
  - Provide your phone number, your hours of work and which days you are out of the office due to modified days.
  - Provide the 1-800 number and encourage them to call if they cannot reach you right away
  - Refer them to the website and Working to Well for more information
  - Introduce your return to work assistant, what their role is, and when they may hear from them.
- If you have an upcoming absence planned, inform the worker and let them know who to contact in your absence.
- Tell the worker you are looking forward to helping them in their recovery and getting back to work. Thank them for their time.

☑ **Contact employer(s) and health service provider(s) through WCB Online securing messaging** (or phone if the employer does not use WCB Online) to notify them about the change in case worker within five business days of receiving the claim

3. COMMUNICATE WITH OUTGOING CASE WORKER

☑ Inquire with outgoing Case Worker about any scheduled **Case Conferences**

☑ If transitioning into **entire caseload in an IST**, meet with the **Relationship Manager**

☑ Share information about **Special Investigations Unit involvement in-person**

- If transitioning into a previously **vacant** case load, inquire with **Manager or SIU**

PREPARATION CHECKLIST FOR CASE CONFERENCE

This checklist will help case workers prepare for the facilitation of a case conference. It's meant to support your existing knowledge of the worker and the claim.

A SUCCESSFUL CASE CONFERENCE

- ☑ **Consider the experience of the worker.** Help the customer understand what to expect, ensure everyone's voice is heard.
- ☑ **Be prepared.** Know the claim facts, and understand your objectives and desired outcomes.
- ☑ **Plan for the meeting.** An effective agenda will help ensure a smooth conference meeting.

1. PREPARE FOR THE MEETING AND GAIN UNDERSTANDING OF CUSTOMERS PERSPECTIVE.

☑ Review the file to understand the worker's experience and the claim, including:

- What has happened to date?
- What are the RTW barriers and plan to address? Are there compliance issues to address?
- Where could the worker's recovery potentially go from here (e.g. full return to work, tiered assessment, PMI, EERB, etc.)? What would the next steps look like to reach those outcomes?
- What do you hope to achieve from the case conference?

ASSESSING THE RIGHT FORMAT

IN PERSON

- An initial T3 meeting
- When there are many participants
- If there is a potential for conflict, resistance or other barriers
- If the meeting involves an external third party (worker advocate, OEA, OWC, etc.)

ON THE PHONE

- The need for a meeting to happen quickly.
- If there is alignment on the return to work plan already and it is progressing
- Travel is a consideration

☑ Decide who needs to attend.

- In addition to the worker, employer and primary health service provider, this may include a union representative, psychologist, family physician, etc.

☑ Determine the format: In person of over the phone.

- You may change the format once you contact the participants.

2. CONTACT THE CASE CONFERENCE PARTICIPANTS

✔ Contact the health service provider (HSP) by telephone or WCB Online.

- If you've had consistent communication with the HSP and are aligned on the return-to-work plan, online communication would be sufficient. If not, consider calling the HSP.
- Explain the objective, ask if there is anything else they would like to discuss and determine who will attend. Receive an update on any return-to-work barriers noted in the claim file.
- Request that all relevant outstanding documents be shared at least two days prior to the case conference, or discuss any recommendations from upcoming documents
- Ensure that the team lead(s) for the worker's treatment will be in attendance (e.g., the Physiotherapist leading the plan, in addition to the Kinesiologist administering the FCE).
- Indicate the RTWA from WCB may be in touch to schedule the case conference
- Document a record of the conversation

✔ Contact the employer by telephone ✔ If this is the worker's first case conference, explain the format and

- Explain the objective of the case conference, purpose, attempt to demystify the process and put the worker at ease, if there is anything else they would like to discuss, explain your role and theirs, answer any questions they may have about determine who will be attending, and ask for an the case conference and refer them to Working to Well for more context update on any return-to-work barrier noted in the and information claim file
- If appropriate, inquire about transitional duties, accommodation and other supports available for the worker
- Indicate the RTWA from WCB may contact to schedule the case conference
- Document a record of the conversation

✔ Contact the worker by phone

✔ Help the worker understand how the case conference is designed to support them

- Explain the objective of the case conference, ask if there is anything else they would like to discuss, and ask for an update on any return-to-work barriers noted in the claim file
- Discuss who will be attending the case conference
- Suggest that they write down any questions they want to raise in advance
- Indicate the RTWA from WCB may be in touch to schedule the case conference
- Document a record of the conversation

3. DEVELOP YOUR PLAN

✔ Document the objective(s) using the **Case Conference Template**

- Make a list of all outstanding questions, issues and return-to-work barriers you want to discuss as part of the meeting. This will help you facilitate the discussion. Remember,

CONFERENCE CHECK IN

1. Do you have the right format (in person/telephone)?
2. How much time will you need?
3. The location: If the meeting is in person, consider opportunities to hold it at the worker's workplace, particularly if the worker is working full-time or completing transitional duties
4. Schedule the case conference, with the assistance of the RTWA.

during the case conference from the meeting participants.

- How would you address these or respond?
- What documents do you need to gather in advance to be prepared (e.g. Worker's Activity Report)?

✔ Engage a Coach or your Manager for review of your case conference objective and plan in advance of the meeting

- Consider seeking assistance if you are concerned about the case conference, if you feel unprepared for any reason, or if you are engaging with an external third party (e.g. worker advocate, OEA, OWC, etc.) for the first time.

your role as the Case Worker is to act as leader of the meeting, to coach the employer and to be supportive of the worker.

- ✔ Consider other discussion points that may arise