

# South Georgia 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 South Georgia Conference Joint Committee on Medical Leave (JCML) consists of members and staff from the Conference Board of Ordained Ministry (BOM), the Conference Board of Pensions and Health Benefits (CBOP) and the Cabinet. The JCML is responsible for the process of reviewing requests for Medical Leave.

Approval for Disability Benefits occurs through the General Board of Pension and Health Benefits (GBOPHB) and LIBERTY MUTUAL, coordinated by the Office of Administrative Services and the conference benefits officer. (LIBERTY MUTUAL, as a third-party vendor, is used to prevent a conflict of interest, thereby protecting the applicant's interests.)

Obtaining Medical Leave and Disability Income Benefits involve two separate decisions, and have separate qualifying criteria.

- Medical Leave. A clergy may be granted annual medical leave without losing their relationship to the annual conference. It is granted upon recommendation of the Joint Committee on Medical Leave, and approval by the Conference Board of Ordained Ministry and the Conference Board of Pensions, and by a majority vote of the executive session of clergy members in full connection.
- Disability Income Benefits. The Conference Benefits Officer is responsible for administering the clergy application for Disability Income Benefits. *However, the General Board of Pension and Health Benefits is solely responsible for determining one's eligibility to receive Disability Income Benefits, as determined by their third-party vendor to prevent a conflict of interest.*

Having made these distinctions, a clergy person who receives Disability Income Benefits from the General Board of Pension and Health Benefits also is placed on Medical Leave. On the other hand, one may be placed on Medical Leave, yet not be approved to receive Disability Income Benefits.

Medical Leave is a relationship that may be initiated by the clergy member or the cabinet. It may be initiated with or without the consent of the clergy member. When medical leave is given without the clergy member's consent, the clergy person shall have the right to appear before the JCML. In the event of unresolved issues, the clergy person shall be afforded his or her rights under the fair process provisions of Par. 361.2. All reasonable accommodations should be made to enable qualified clergy with disabilities to serve in ministry settings compatible with their gifts and graces.

## 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 Assistant to the Bishop for Ministerial Services. 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 Officer in South Georgia Office of Administrative Services.
3. Once the request for disability benefits has been received, the Benefits Officer will send a claim packet and instructions to the clergy member. The packet will include:

**Form A: Applicant Information for Long-Term Disability Benefits** – This form is information that you will need to complete and remit back to the Conference office.

**LIBERTY MUTUAL – Medical Release Authorizations** – These forms are a medical release giving LIBERTY MUTUAL permission to ask for additional documentation from your physicians.

**Form C: Clergy Disability Benefits Application:** This is the actual application form for the disability/incapacity leave. You will need to obtain your district superintendent's signature and remit to the Conference Benefits Officer. The Benefits Officer will obtain the other two signatures required on the form. The form includes a medical release giving the General Board of Pension permission to ask for additional medical documentation.

**Form 3106: Depository Agreement For Payments:** This form authorizes the GBOP to directly deposit your benefits (if approved) into your bank account.

**Disability Loan Agreement:** The Conference Board of Pension may authorize a loan to provide salary support to the clergy applicant during the process of applying for disability. This loan will come in the form of a grant administered by the General Board of Pensions. If disability is approved, this loan will be repaid from the initial "retroactive" funds provided by disability. If disability is not approved, this loan must be repaid.

Once these forms have been received by the General Board of Pension and Health Benefits, the General Board will open the claim. A typical claim takes 30 – 45 days for approval. If LIBERTY MUTUAL needs additional information, then LIBERTY MUTUAL will contact the medical provider directly. You will receive notification from LIBERTY MUTUAL and/or the General Board of Pension if additional information is needed. If you receive an additional information letter from LIBERTY MUTUAL, then it is highly recommended for you to contact your medical provider to help expedite the process. Otherwise, the medical 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 South Georgia 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 automatically recommend the relationship change of Medical Leave if it has not done so already. Approval by the Board of Ordained Ministry and the Conference Board of Pensions will be required. The executive session of the clergy will consider the relationship change at annual conference. The date of the Medical Leave may be dated back to the time the clergy took leave from pastoral responsibilities.
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 and the conference benefits officer, will agree upon an effective date.
8. Between sessions of the annual conference, medical leave may be granted by the bishop for the remainder of the conference year, after review by the JCML and with the approval of a majority of the district superintendents, and after consultation with the executive committee of the Conference Board of Ordained Ministry and the BOP.
9. Information obtained by the JCML is held in the strictest confidence. Additionally, the JCML may not obtain medical information unless the applicant signs an authorization for release of information for the benefit of the JCML in its decision-making process.

## **PROCESS FOR COMING OFF MEDICAL LEAVE**

### When approval by the General Board of Pensions to continue on medical leave ends

- Approval for disability income is reviewed annually. This is a process administered by The General Board of Pension and Health Benefits through its third party vendor (LIBERTY MUTUAL).
- When eligibility for continued disability income ends, the clergy person will need to make a choice to request a change of relationship to one of the following: retirement, voluntary leave of absence, honorable location, return to an appointment, or continue the relationship of medical leave with no disability income.

### To request a change of relationship to retirement

- The clergy person requesting the retired relationship with the annual conference should make it in writing to the bishop and copied to the district superintendent, the Assistant to the Bishop for Ministerial Services, and the Director of Administrative Services.
- More information about retirement can be found in *The 2016 Book of Discipline* in ¶357.

#### 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 ¶353.
- The process to request honorable location can be found in *The 2016 Book of Discipline* in ¶358.
- Further information can be obtained by calling the Office of Ministerial Services.

#### To continue the Relationship of medical leave with no disability income

- Clergy person must make a request for continued medical leave through the JCML.

#### 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 Officer.
- The clergy person should send a letter to the Bishop, with a copy to the district superintendent and the Office of Ministerial Services, 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 Office of Ministerial Services, 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 votes whether or not to confirm the recommendation regarding conference relationship.
- Finally, the executive session of clergy votes whether or not to confirm the recommendation regarding change in conference relationship.
- The effective date of terminating medical 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.