Accommodation need identified by employee or manager.

HDMS meets
with employee
along with
manager to
discuss roles and
responsibilities
and possible
solutions.

Employee submits forms and medical documentation to SunLife Disability Case Manager.

HDMS receives and reviews assessment and recommendation(s) from SunLife Disability Case Manager.

HDMS sends letter to schedule a meeting with employee and manager if need for accommodation is confirmed OR HDMS sends letter to employee and copies manager explaining reasons for denying accommodation

and provides employee with information on appeal process.

Accommodation plan monitored by manager as appropriate.

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HDMS reviews
accommodation plan
annually (at minimum)
with employee and
manager.

Manager or employee contacts Health and Disability Management Specialist (HDMS).

HDMS sends employee
letter outlining
accommodation process
along with Plan Member
Statement and Attending
Physician's Statement
(manager copied) and
schedules time to meet
with employee and
manager.

HDMS submits
referral form and
employee job
details to SunLife
Disability Case
Manager.

HDMS sends letter to employee confirming receipt of forms and med doc and anticipated response date OR HDMS sends reminder letter to employee if forms and medical documentation remain outstanding.

HDMS meets with employee and manager to discuss accommodation measures if applicable.

HDMS creates and shares the formal accommodation plan with employee and manager after meeting.

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