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**TOTAL ABILITIES MANAGEMENT (TAM) HANDBOOK**

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## **OUR POLICY**

The Waterloo Catholic District School Board (WCDSB) believes that both individual and organizational health are important factors affecting the ability of all employees to attend work and to fully contribute to the Board's mission.

To that end, the WCDSB has a program that combines both prevention and intervention to achieve improved organizational and individual health. This supportive program fosters collaboration between the employee, the union and the WCDSB to address barriers to workplace wellness, attendance and support successful return to works.

### **The Total Abilities Management Program (TAM)**

Absenteeism occurs when employees do not attend work when they are scheduled to do so. Absences are often unscheduled and occur for reasons beyond the employee's control. This absenteeism is called "Innocent Absenteeism." TAM is designed to address "Innocent Absenteeism" and to support employees so that they are able to attend work regularly.

This Program contrasts with the treatment of culpable or blameworthy absenteeism, which is addressed through the Board's Progressive Discipline Procedures. TAM does not affect existing benefits accorded under the various collective agreements and terms of employment. Instead, it reinforces the point that sick leave is to be used only for its intended purpose, i.e., providing wage loss replacement in the event of personal illness or injury.

The purpose of the Total Abilities Management Program (TAM) is to:

- Support employees who are unable to work due to a physical or cognitive illness, injury and/or disability by applying disability management best practice.
- Promote wellness strategies and employee well-being supports.
- Provide a positive, consistent and standardized attendance support program for all employees focussed on adopting medical and well-being supports and strategies with the goal of regular and consistent attendance. Facilitate return to work programs where applicable for employees who have been absent from work due to illness or disability.
- Develop appropriate, individualized accommodation plans that address barriers to full workplace participation while preserving the dignity of the employee, in accordance with Accessibility for Ontarians with Disability Act and the Ontario Human Rights Code.

The key components of the TAM Program are:

- I. Prevention
- II. Reporting of absences
- III. Health Information Requirements
- IV. Attendance Support
- V. Early intervention, return to work facilitation and workplace accommodation

The remainder of this manual describes the elements of TAM and how they are connected.

Definitions of terms used in this manual are found in the Appendix.



## **Section I: Prevention/Wellness/Resources**

Every employee plays a vital role in helping the Waterloo Catholic District School Board (WCDSB) reach its goals. The WCDSB believes that employees are better able to contribute if employees are healthy and supported. The following is available to support workplace wellness:

- **Employee and Family Assistance Program**  
Available to all WCDSB employees and their families to access services that support mental and physical health, wellness and crisis intervention.
- **Joint Health and Safety Committee**  
Reviews and advises on all matters related to the Occupational Health and Safety Act to ensure every reasonable precaution is taken to provide employees with a healthy and safe workplace.
- **Total Abilities Management Team**  
Management of occupational and non-occupational claims and disability management with a focus on proactive strategies and accommodations and early intervention and early return to work.
- **Wellbeing Strategy**  
Supports the cognitive, emotional, social, physical and spiritual needs of employees and students with focus on spiritual wellness, positive mental health, safe and healthy with a focus on an inclusive and equitable education.

Wellness Steering Committee: Implementation and promotion of preventative strategies to improve individual and organizational health.

## **Section II: Reporting Absences**

Employees are expected to make every reasonable effort to attend work as scheduled. The WCDSB recognizes, however, that despite this expectation there will be times when employees are unable to attend work.

In order to ensure a consistent and equitable approach throughout the Board, it is imperative that all absences are reported for all positions, not only those requiring replacement personnel.

### **Employee Responsibilities**

When employees are unable to attend work, they need to report their absences as soon as possible by following the processes established for each employee group and/or the process established at their school or worksite.

Employees will be asked to provide the following information to the dispatcher and/or school or worksite:

- Name
- General reason for the absence, e.g., sickness (a diagnosis is not required)
- Expected duration of the absence.

### **Principal/Supervisor Responsibilities**

- Being accountable for monitoring staff attendance.
- Knowing and practicing the procedures of TAM
- Ensuring accurate and timely reporting of all absences.
- Notify the Human Resources Services Officer responsible for managing employee use of sick benefits of employee absences that are likely to be five (5) consecutive working days or greater.



### **Superintendent Responsibilities**

- Being accountable for the attendance of management staff who report to the Superintendent.
- Reviewing staff attendance with supervisors.

### **Human Resources – Total Abilities Management Designate Responsibilities**

Ensuring the accuracy of the absence data.

## **Section III: Health Information Requirements**

Health/medical information is among the most sensitive information that employees provide to the Board. It is critical that it be treated with the utmost of respect. Therefore, the Board acknowledges and strictly adheres to the legislation pertaining to the Personal Health Information Act as it relates to the collection, use and disclosure of personal health information.

NOTE: Arbitration decisions and case law indicate that while employers are entitled to substantiate absences from work by determining if employees have limitations or restrictions that prevent them from working, they are not entitled to confidential health information such as diagnosis. This is stated in subsection 63(2) of the Occupational Health and Safety Act: No employer shall seek to gain access, except by an order of the court or other tribunal or in order to comply with another statute, to a health record concerning a worker without the worker's written consent.

Medical information is required for several reasons:

- To medically verify absences as outlined in the collective agreements and terms of employment.
- To staff and replace personnel appropriately.
- To provide Human Resource Services with the information necessary to ensure compliance with human rights legislation.

Where an absence is five (5) consecutive working days or greater, a Medical Certificate must be completed. The Standard Medical Certificate (SMC) has been developed to ensure that there is a consistent approach to the way such confidential information is requested, handled, and stored. There are additional contractually agreed upon forms for certain union groups. The certificate must be completed by the employee's physician (or regulated health care professional) and returned to the Total Abilities Management Team (TAM) within ten working days after the first day of absence or upon the employee's return to work (if earlier).

### **Employee Responsibility**

- Provide the WCDSB (Total Abilities Management Department) a completed Medical Certificate for all absences five consecutive working days or greater.
- The Standard Medical Certificate (SMC), OECTA Medical Certificate and OSSTF Medical Certificate can be found on [StaffNet\Human Resource Services\Total Abilities Management \(TAM\)](#)
- A separate Standard Medical Certificate is provided for absences related to surgery. The SMC-Surgery is to be provided before surgery, if possible, so appropriate staffing can be arranged; however, if the form cannot be provided until after surgery, the Board will allow for a period of five business days.
- Provide a completed Medical Certificate clearly identifying medical restrictions and limitations if a medical condition requires the employer to develop or implement a workplace accommodation or return to work plan.



### **Principal/Supervisor Responsibilities**

- Remind employees of their need to provide a completed Medical Certificate for all absences related to illness that are five consecutive working days or greater in duration.
- Contact Human Resource Services when employee is absent for five consecutive days or greater to ensure appropriate documentation has been provided.
- Ensure that neither the original or copies of any medical documentation are kept by the employee's supervisor.

### **Human Resources – Total Abilities Management Designate Responsibilities**

- Review the absence reports submitted by principals/supervisors to identify employees who are absent for five consecutive working days or greater.
- Contact employees at five consecutive days to express concern, offer support and remind them to provide a Medical Certificate and/or functional ability information.
- Cross-check to ensure that Medical Certificates are received.
- If a Medical Certificate is not received, contacting employees to inform them that a medical form is required and that access to sick leave benefits may be jeopardized if they do not provide such documentation.

## **Section IV: Attendance Support Program (ASP)**

The WCDSB has an Attendance Support Program (ASP) for addressing individual employee attendance concerns that is integrated with its Total Abilities Management Program. The ASP focuses on collaborating with employees to provide support and resources for improved personal and organizational wellness.

The intent of the ASP is to provide non-disciplinary and supportive assistance to employees who exceed the WCDSB's established absence threshold. It is not intended to find fault, blame, or discipline employees for taking personal illness days. A higher-than-average rate of sporadic absenteeism is often an indication that an employee may be experiencing barriers to regular workplace attendance and, through the ASP, the WCDSB hopes to aid employees in removing these boundaries and establishing more consistent workplace attendance.

### **Operating Procedures**

An employee may receive a letter when their level of absences due to personal illness and personal medical appointments are greater than the established threshold over a 12 month rolling calendar year.

The ASP threshold is:

- 12 occurrences for 10 month employees
- 14 occurrences for 12 month employees

The threshold will be reviewed annually or biennially by the WCDSB. Unions will be notified by September 1st of any changes to the threshold prior to the start of the school year. When an employee's absences have exceeded the threshold, the ASP process will be initiated. Entry into any level of the multi-level process is applied consistently to all employees. The WCDSB reserves the ability to apply discretion in individual cases when the circumstances support doing so.

### **The Attendance Support Program Process**

The Attendance Support Program includes a Preliminary Level that occurs prior to an employee being entered into the official Program. The Preliminary Level is intended to provide the employee with awareness of their absenteeism and advise them of supports available to them that may assist in improving their attendance. The official Attendance Support Program has 4 distinct components: Level 1 - Coaching, Level 2 - Coaching, Level 3 - Coaching, and a Level 4 – Attendance Review Meeting.

**Preliminary Level - Awareness:** An employee will receive an Attendance Awareness and Support Letter when their level of absence due to Code 00 – Personal Illness and Code 00AP- Medical Appointment exceeds the established threshold. If an employee who received a Preliminary Level – Awareness letter has extenuating circumstances that they feel precludes them from participating in the program, instructions for contact will be



provided. Upon receiving the letter, employees are provided with an absence goal within a 90-day working period. Employees who meet the absence goal will not be entered into the ASP.

**Level 1 - Coaching:** If an employee exceeds the Preliminary Level goal, they will enter Level 1 of the ASP and receive a follow-up letter via WCDSB email outlining the absence dates captured within the specified period. The employee will receive an attendance goal for the next 90-day working period. As part of the entry into the Program the employee may be scheduled to attend a Coaching Meeting. The meeting will include the employee, their Principal/Supervisor, and the Human Resources Designate from the Total Abilities Management Team. Union representation is not required; however an employee may invite their union representative to attend. During this meeting, the circumstances contributing to the employee's absenteeism will be reviewed and specified support and resources will be offered.

**Level 2 - Coaching:** If an employee exceeds the Level 1 goal, they will enter Level 2 of the ASP and receive a follow-up letter via WCDSB email outlining the absence dates captured within the specified period. The employee will receive an attendance goal for the next 90-day working period. A Coaching Meeting will be scheduled at this Level. The meeting will include the employee, their Principal/Supervisor, and the Human Resources Designate from the Total Abilities Management Team. Union representation is not required however, an employee may invite their union representative to attend. During this meeting, the circumstances contributing to the employee's absenteeism will be reviewed and specified support and resources will be offered.

**Level 3 - Coaching:** If an employee exceeds the Level 2 goal, they will enter Level 3 of the ASP and receive a follow-up letter via WCDSB email outlining the absence dates captured within the specified period. The employee will receive an attendance goal for the next 90-day working period. A Coaching Meeting will be scheduled at this level. The meeting will include the employee, their Principal/Supervisor, the employee's union representative, and the Human Resources Designate from the Total Abilities Management Team. During this meeting, the circumstances contributing to the employee's absenteeism will be reviewed and specified supports and resources will be offered. The employee will be advised if their attendance continues to exceed the prescribed goal, they will advance to Level 4, and their file will be transferred to the Manager of Labour Relations. After Level 4, a termination of employment may be a potential outcome if they are unsuccessful in the ASP.

**Level 4 – Attendance Review Meeting:** If an employee exceeds the Level 3 goal, they will enter Level 4 of the Program and receive a follow-up letter via WCDSB email outlining the absence dates captured within the specified period. The employee will receive an attendance goal for the next 90-day working period. The employee will be scheduled to attend a meeting to review the overall attendance concerns. The meeting will include the employee, their Principal/Supervisor, the Manager of Labour Relations, the employee's union representative, and the Human Resources Officer from the Total Abilities Management Team. During this meeting, there will be a review of the employee's absenteeism, and the supports offered at each level of the Program. The employee will be advised that a termination of employment may be a potential outcome if they are unsuccessful in reaching their Level 4 attendance goal for the next 90-day working period.

### **Exiting the Attendance Support Program**

When attendance goals have been met within one of the ASP Levels, the employee enters a Review Period of 12 months with a set goal of absences to maintain. If the employee exceeds the goal within the 12-month Review Period, they may re-enter the ASP at the Level they most recently exited. Employees who do not exceed the goal in the Review Period will exit from the ASP after the 12-month period has passed.

### **Codes Considered in Program**

Code 00 – Personal Illness, not including approved medical leaves

Code 00U – Personal Illness Unpaid, not including approved medical leaves

Code 00AP – Personal Medical Appointment, not including exempted Personal Medical Appointment dates

### **Employee Responsibilities:**

- Maintain regular attendance and follow absence reporting procedures.
- Engage in the ASP process and cooperate with attendance goals.



- Address health concerns affecting attendance.
- Involve union representation if desired and provide necessary documentation.

**Principal/Supervisor Responsibilities:**

- Communicate attendance expectations and identify absenteeism patterns.
- Collaborate with the Total Abilities Management Team.
- Support employees with resources (e.g., EFAP).
- Foster a positive work environment and participate in ASP meetings.

**Human Resources – Total Abilities Management Designate Responsibilities:**

- Support supervisors and employees in managing absenteeism.
- Ensure fair application of ASP and facilitate Levels 1–3 meetings.
- Refer to Disability Management when needed.
- Develop individualized attendance goals and follow up on meetings.

**Labour Relations Manager Responsibilities:**

- Facilitate Level 4 ASP meetings.
- Review cases of employees not meeting goals.
- Support ASP implementation and monitor meeting outcomes.

**Human Resource Services Superintendent Responsibilities:**

- Act as executive sponsor to promote ASP within leadership.

**Union Responsibilities:**

- Attend ASP meetings (Levels 1–2 by request, Levels 3–4 mandatory).
- Support employees and participate in ASP committee feedback.

## **Section V: Early Assistance, Return to Work and Workplace Accommodation**

There are many reasons for employers to provide early assistance, return-to-work and workplace accommodation to employees who have disabilities.

- Employers benefit when employees are able to attend work.
- Employers are in compliance with the Ontario Human Rights Code and the Workplace Safety and Insurance Act when they provide disabled employees with the necessary accommodations to enable them to stay-at-work/return-to-work.
- Occupational specialists recommend that attending work is beneficial to employees in terms of their physical and emotional health, not just their financial well-being.

The WCDSB endorses the idea that work is an important aspect of employee health, and therefore is committed to supporting stay-at-work and early return-to-work initiatives. Delivery of services to assist employees in remaining at work or returning to work after an illness or injury is led by the Total Abilities Management Team. Research tells us that the most effective programs include the employee's supervisor in the process of developing stay-at-work or return-to-work plans. For this reason, we require that principals/supervisors participate in the stay-at-work/return-to-work processes as outlined in the disability management operating procedures.

Where necessary, the Board reserves the right to have an independent medical practitioner consult with the employee's physician or regulated health care professional to clarify and identify restrictions and/or limitations to determine suitable workplace accommodations, return to work plans or eligibility for sick leave benefits.



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### **Employee Responsibility**

- Assist in identifying the barriers to regular attendance at work and cooperate to overcome these barriers.
- Consent to the release of medical and/or functional information from the appropriate health care practitioners to assist with obtaining necessary information in regard to restrictions and/or limitations.
- Attend medical or functional examinations at the employer's request to assist in determining suitable return to work or eligibility for sick benefits.

### **Principal/ Supervisor Responsibilities**

- Inform employees of the Board's commitment to assist them in staying-at-work/returning- to-work.
- Actively participate in the identification of accommodations that will enable employees to stay-at-work/return-to-work.
- Support employees when they stay-at-work/return-to-work.
- Meet responsibilities as identified in the disability management operating procedures.

### **Human Resources – Total Abilities Management Designate Responsibilities**

- Contact employees upon receipt of medical documentation to remind them of the Board's commitment to provide necessary accommodations.
- Identify, with employees, the barriers to their stay-at-work/return-to-work.
- Develop, coordinate, and implement plans for removing the barriers to employees' stay-at-work/ return-to-work.
- Collaborate with employees and supervisors in identifying accommodations, if required, to enable employees to stay-at-work/return-to-work.
- Formalize modified work programs and monitor employee's progress.
- Meet responsibilities as identified in the disability management operating procedures.

## **APPENDIX**

### **Definitions**

**Accommodations:** Modifications provided to enable a disabled employee to remain at work or return to work. The Ontario Human Rights Code outlines responsibilities of employers, employees and unions with respect to accommodation in the workplace.

**Active Working Months:** the normal months that an employee is scheduled to actively be at work (i.e., not on an approved Leave of Absence, or some other form of approved leave).

**Attendance Support Process:** The process of providing an employee with formal support to enable them to regularly attend work.

**Attendance Goals:** An individualized work attendance objective set with an employee who is in the Attendance Support Process. The goal is set in consultation with his/her principal/supervisor and with the Human Resources Services Officer. After determining the barriers to regular attendance, the employee and the Human Resources Services Officer will set a goal that is specific (i.e. for the next ninety working days), measurable, attainable, realistic and timely.

**Barrier:** Anything – including physical (environmental), architectural, technological (informational), or attitudinal that is based on information or communications or anything that is the result of a policy or a practice – that hinders the full and equitable participation in society of persons with an impairment, including a physical, mental, intellectual, cognitive, learning, communication or sensory impairments or a functional limitation (Accessible Canada Act, 2022).

**Culpable/Blameworthy Absenteeism:** Absences for which the employee should be held responsible because they are within their control, example: lateness/leave early, failure to notify, absent without leave, abuse of leave. This issue is addressed through the Progressive Discipline Procedures.



**Equity:** A condition or state in which access to opportunities and resources are distributed fairly, justly, and equitably. Equity involves treating some people differently, or giving them what they need, so they may meet the same outcomes as others.

**Extenuating Circumstances:** The WCDSB (“the Board”) may exercise its discretion with regard to a variety of factors, including, the employee’s history of absenteeism, the nature of the problem identified as contributing to the absenteeism, the co-operation of the employee in any support or medical programs and whether any absences were claimed as emergency leave in accordance with the Employment Standards Act.

It is understood that before making any of the above decisions, the Board will take into account any obligations that it may have under law and/or the collective agreements and terms of employment and in that regard, recognizes that the “duty to accommodate” may have application in any employee’s particular circumstances”.

**Functional Ability Form:** A standardized form to be completed by a physician (or in some instances, a health care practitioner as recognized by Health Canada) outlining an employee’s abilities, restrictions, and/or limitations. With this information, the employer is able to determine whether or not workplace accommodation is appropriate.

**Innocent Absenteeism:** Also referred to as blameless absenteeism. Absences incurred by an employee as a result of circumstances beyond their control, example: illness or injury.

**Occurrence:** An absence occurring on the date, day or shift that an employee is scheduled to attend work.

**Return to Work Program:** A plan created to assist an employee to return to work after an illness or injury in a manner that is early and safe.

**Review Period:** After successful completion of goals that may be established for the 90 day period in Coaching Levels 1-4, the employee enters a Review Period that allows the employee to demonstrate their ability to sustain the absence threshold pursuant to the ASP. If they are unable to sustain the threshold during the Review Period, they return to the Coaching Level they completed or may move to the next Coaching Level.

**Standard Medical Certificate:** A standardized form for medical absences of 5 consecutive working days or greater to be completed by a physician to substantiate an employee’s absence due to illness or injury. In some cases, a Standard Medical Certificate will provide documentation of an employee’s ability to return to work and/or regular duties, or provide substantiation for medical conditions/circumstances that may require workplace accommodation.

**Threshold:** The identified number of absence dates that, when reached, prompts the Total Abilities Management Designate (and/or Principal/Supervisor) to meet with an individual to discuss absences.

**Transitional Work Program/Plan:** A temporary time-defined program created to assist employees to make the transition back into the regular duties of their assignment/position.