

## Clinical role of Occupational Therapist and the role of Recovery Specialist in Enhanced Care

For claims with a crash date of May 1, 2021 or later, this document will assist ICBC Recovery Specialists and Occupational Therapists to differentiate and specify their respective roles.

Within ICBC's Enhanced Care model, the role of Occupational Therapist has shifted away from administrative case management to the provision of clinical assessment and treatment services.

### **Occupational Therapist:**

Occupational Therapists are regulated health care professionals who provide assessment and treatment to improve function through activity. This can occur at home, at school, at work or in the community. Occupational therapists work with clients with physical, neurological, cognitive, behavioural and mental health barriers with the focus on restoring independence in daily activities. The purpose is to provide safe and effective occupational therapy treatment, to evaluate clinical progress and/or risk, and to communicate with stakeholders about a client's progress toward functional goals. Occupational therapy assessment and treatment can include clinical communication. Clinical communication can be written or verbal. Clinical communication is undertaken to progress an OT intervention and treatment objective.

### **Recovery Specialist:**

Recovery Specialists collaborate with the customer to achieve recovery goals through evidence informed recovery decisions. They work with the customer to set recovery milestones and actively support recovery of motor vehicle accident (MVA) related barriers by monitoring progress against agreed upon milestones and goals. Recovery Specialists align the customer and health care provider(s) to ensure the recovery plan remains consistent with insurance principles and goals. They request and receive assessment and treatment information from health care providers, to support in understanding recovery needs and to determine funding and benefit requirements. They work with other stakeholders to determine priority of payer and communicate information accordingly.

**Note:** To ensure an effective partnership, ICBC expects and requires clear and timely communication between the Recovery Specialist and **all** health care providers, including Occupational Therapists. To uphold this, discussions via **phone calls** are strongly encouraged at the initiation of services and as customer’s recovery status changes.

The following table illustrates the collaboration between the Recovery Specialist and the Occupational Therapist within context.

Customer Needs	Recovery Specialist	Occupational Therapist (OT)
<p><b>Medical records collection for ICBC &amp; distribution to Health Care Providers (HCP)</b></p>	<p>Oversees the collection of records to ensure fair, objective adjudication of the claim and prompt access to ensure safe care by all providers</p> <ul style="list-style-type: none"> <li>• Obtains consent, and initiates requests to receive medical records in order to facilitate customer access to funded healthcare</li> <li>• Engage in requests from HCPs to access information</li> <li>• Ensures customer consent requirements are met prior to sharing of information</li> </ul>	<p>Reviews medical information as part of the assessment/treatment process, to facilitate safe, effective provision of OT services</p> <ul style="list-style-type: none"> <li>• Identifies medical information that is required to provide safe and effective OT treatment (e.g. current weight bearing status); this can be achieved by requesting records by ICBC and/or direct communication with the HCPs</li> <li>• Obtains customer consent to release information to ICBC and request information from ICBC</li> </ul>

		<ul style="list-style-type: none"> <li>• Communicates need for records to Recovery Specialist</li> </ul>
<p><b>Customer transportation</b></p>	<p>Obtains necessary functional information to determine customer access to transportation funds and organize that transportation, once determined</p> <ul style="list-style-type: none"> <li>• According to functionally based OT recommendation, completes paperwork and associated applications for client access to transportation (e.g. Taxi Account, Private Non-Emergency Transport)</li> </ul>	<p>OTs can assess function as it relates to the customer’s ability to resume driving, or taking public transportation or another pre-MVA mode of transportation</p> <ul style="list-style-type: none"> <li>• Using current functional assessment findings and knowledge of demands required for accessing various modes of transportation, determines customer’s transportation needs</li> <li>• May complete paper work that must be completed by an HCP (e.g. HandyDART application, parking pass)</li> <li>• Makes clinical recommendation on requirement for alternate mode of transportation and the anticipated timeframe required</li> </ul>

		<ul style="list-style-type: none"> <li>• Recommends cost-effective mode of transportation that is within the customer’s capabilities</li> <li>• Provides OT intervention to facilitate a gradual return to independence with pre-MVA transportation</li> <li>• Uses objective information to develop clinical recommendations (for temporary substitute transportation and how to regain the pre-MVA capacity for transportation)</li> </ul>
<p><b>Referrals to other health care providers, including Occupational Therapists</b></p>	<p>Coordinates health care services that are medically supported, best practices for compensable injuries and within ICBC’s authorization to maximize the customer’s function; holds HCPs accountable to their treatment plans and budgets; discontinues services when ineffective or no longer indicated</p>	<p>Provides clinical recommendations related to the inclusion of other disciplines for the purpose of addressing identified functional barriers</p> <ul style="list-style-type: none"> <li>• Based on assessment of function, communicates recommendations to ICBC and clearly indicates clinical reasoning for recommendations (prior to</li> </ul>

	<ul style="list-style-type: none"> <li>• Contacts the referring HCP by phone call to gather information on referral rationale in order to determine benefit entitlement</li> <li>• Reviews recommended treatment for possible entitlement</li> <li>• Coordinates and supports the customer in the selection of provider</li> <li>• Engages selected OT for assessment and report</li> <li>• Approves initial assessment/visit and subsequent treatment plans as appropriate and budgets for each provider</li> <li>• Seeks updates on progress as needed by requesting a progress report, care plan meeting or discussion with the HCP</li> <li>• Facilitates inter-professional</li> </ul>	<p>discussion with the customer or other HCP(s))</p> <ul style="list-style-type: none"> <li>• Communicates to ICBC consideration for engaging other HCP with rationale if not yet engaged</li> <li>• Participates in requested care plan meetings and communicates with other HCP(s) to problem solve and ensure treatment approaches are aligned to address functional barriers because of MVA related injuries</li> </ul>
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	<p>communication by sharing documentation between approved parties as able by consent. Initiates and coordinates care plan meetings</p>	
<p><b>Coordination of entitlement and benefits with other insurers</b></p>	<p>Identifies and coordinates appropriate entitlements and benefits</p> <ul style="list-style-type: none"> <li>• Coordinates health care services with other insurer as required</li> <li>• Confirms entitlement and funding coverage and assisting customer in the understanding of this and the transition between funding sources</li> <li>• Determines what information is required to make an informed funding decision</li> <li>• Be explicit with the customer about what is required and outline the steps to meet those requirements</li> </ul>	<p>Provides clinical services with awareness of how benefits and entitlements are coordinated</p> <ul style="list-style-type: none"> <li>• Redirects customer questions and concerns to the Recovery Specialist for clarification</li> <li>• Provides clinical recommendations</li> </ul>

<p><b>Cost sharing of rehabilitation expenses</b></p>	<p>Fiscally responsible while providing quality services the customer is entitled to</p> <ul style="list-style-type: none"> <li>• Informs the customer of communication and information requirements to determine funding eligibility by ICBC.</li> <li>• Coordinates with other insurers to determine financial responsibility for payment of rehabilitation services</li> <li>• Once benefit eligibility and cost sharing is confirmed between ICBC and other insurer, inform vendor of billing implications (eg. Vendor: Ergo Chair - 50% Long Term Disability insurer funded; 50% ICBC funded)</li> </ul>	<ul style="list-style-type: none"> <li>• Advises ICBC when it is known that there is or may be another insurance funder that could be accessed to pay for treatment services or equipment (e.g. Sun Life)</li> </ul>
<p><b>Home and medical equipment</b></p>	<p>Facilitates funding for required medical equipment promptly, to ensure customer safety</p>	<p>Identifies medical equipment required for customer safety, and provide OT treatment to facilitate safe use by customer once vendor installs/delivers equipment.</p>

	<ul style="list-style-type: none"> <li>• Initiates referral to OT for hospital discharge assessment</li> <li>• Approves request for equipment which exceeds pre approval amount if eligible</li> <li>• Contacts the vendor to pick up rented equipment when the OT has deemed no longer required</li> <li>• Implement/complete CL702 aligned with Hospital Discharge Program referral</li> </ul>	<ul style="list-style-type: none"> <li>• Via OT in-home functional assessment including review of medical records and consultation with family physician, specialist or hospital, OT determines customer's equipment needs</li> <li>• Contacts Master Standing Agreement (MSA) contractor to arrange appointment at residence and/or delivery of specific equipment</li> <li>• Assesses all equipment features match clinical/functional needs</li> <li>• If MSA contractor does not have required equipment, obtain 2 quotes for equipment that meets the clinical needs of the customer</li> <li>• Assesses safety with the equipment in place to facilitate safe and appropriate set-up, and that the customer has</li> </ul>
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		<p>learned how to use it appropriately</p> <ul style="list-style-type: none"> <li>• Provides approved OT clinical treatment to promote early return to pre-MVA function</li> <li>• Provide clinical recommendation on transitioning off equipment (or to alternative equipment) and when equipment is no longer clinically required.</li> </ul>
<p><b>Functional ergonomic equipment</b></p>	<p>Funding and coordination</p> <ul style="list-style-type: none"> <li>• Reviews recommendations for possible approval based on entitlement</li> <li>• Purchases recommended items and coordinates delivery to the customer's residence (or provides budget to customer who purchases and submits receipts for reimbursement)</li> </ul>	<p>Identifies equipment needs that promote a safe and early return to function/work</p> <ul style="list-style-type: none"> <li>• Assesses function in home and work environments</li> <li>• Determines adaptive equipment required to increase safe participation in daily activities earlier, improve work abilities, promote recovery and/or reduce reliance on support services (e.g. ergonomic equipment, lighter vacuum)</li> </ul>

	<ul style="list-style-type: none"> <li>• Ensure adherence to the medical equipment MSA (if applicable)</li> </ul>	<ul style="list-style-type: none"> <li>• Advises Recovery Specialist of recommendations, with specific required features (including model numbers if necessary)</li> <li>• If MSA contractor does not have required equipment, obtain 2 quotes for equipment that meets the clinical needs of the customer</li> </ul>
<p><b>Return to Work</b></p>	<p>Ensures that the team is focused on return to work (RTW); coordinating appropriate supports and funding during the RTW process. Overseeing implementation of RTW plan and accountable for the successful implementation of the plan.</p> <ul style="list-style-type: none"> <li>• Determines job attachment status, job title and work schedule and employer contact information, and provides to OT and health care providers as appropriate</li> </ul>	<p>As requested, assess job demands and whether the customer's current functional abilities match those demands; provide clinical recommendation on RTW progression before and/or during RTW, anticipated return to work date and pertinent safety requirements that apply.</p> <p>May include:</p> <ul style="list-style-type: none"> <li>• Conducts assessment of critical job demands to confirm clinically relevant job requirements</li> </ul>

	<ul style="list-style-type: none"> <li>• Determine if there is appropriate functional, job demand and employment information to understand the customer's RTW Plan</li> <li>• Request a Job Demands Analysis if this information is not available/not complete from the employer</li> <li>• Request functional and job match information</li> <li>• Understand the forecasted RTW timeline and ensure case management focus towards that goal</li> <li>• Determine if the customer's treatment team has the knowledge, capacity and willingness to assist with RTW planning. If not, determine the most appropriate HCP to collaborate with</li> <li>• Coordinates with other active insurers and/or employer regarding</li> </ul>	<ul style="list-style-type: none"> <li>• Completes an OT Work Capacity Assessment addressing physical, cognitive and interpersonal abilities and barriers to work, as related to the compensable injuries, and identifies barriers to RTW</li> <li>• In communication with ICBC, formulates a clinically relevant work plan including recommendations for active rehabilitation, equipment, access to other HCPs and Graduated RTW design and implementation</li> <li>• Involved in care plan meetings with other stakeholders</li> <li>• In communication with ICBC, facilitates the customer's progress throughout the plan, including functional reassessments at the workplace, job coaching, education, and reassurance. Obtains collateral (functional)</li> </ul>
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	<p>Income Replacement Benefit entitlement during the Graduated Return to Work Plan (i.e. who will pay/will it be shared and if so how)</p> <ul style="list-style-type: none"> <li>• In the presence of complex employment situations: consider an OT referral when the customer is struggling to reach RTW to full duties, has a complex employment situation (i.e. safety sensitive position, past failed RTW plan etc.), has cognitive or behavioural challenges (pre or post MVA) or is encountering or anticipates challenges on a GRTW resulting in the inability to RTW to full duties.</li> <li>• Coordinates and collaborates with appropriate stakeholders to ensure a cohesive and aligned RTW plan is achieved and represent</li> </ul>	<p>information from the employer and HCPs as related to work abilities.</p> <ul style="list-style-type: none"> <li>• Provides relevant OT interventions to facilitate a successful and durable return to work (e.g. coaching on active symptom management strategies, education on adapted methods for task completion, recommendations for adaptive equipment)</li> </ul>
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	<p>ICBC during the design process</p> <ul style="list-style-type: none"> <li>• Organize care plan meetings with stakeholders to inform and obtain comprehensive feedback and recommendations on the RTW process</li> <li>• Coordinate with involved HCPs to monitor customer's progress through a RTW plan and engage stakeholders as required through a care plan meeting</li> </ul>	
<p><b>Determining Income Replacement Benefits</b></p>	<p>Determine eligibility for wage loss payments, and paying same</p> <ul style="list-style-type: none"> <li>• Gathers financial records as required and calculates wage loss eligibility</li> <li>• Communicates decisions and rationale for same to customer</li> </ul>	<p>Not applicable</p>
<p><b>Personal Care Attendant</b></p>	<p>Determines eligibility for attendant care funding, using functional information from</p>	<p>Assesses customer function in the home to determine what personal care and home</p>

	<p>the Personal Care Assistance (PCA) report</p> <ul style="list-style-type: none"> <li>• Engage selected OT for PCA and review of findings/ recommendations</li> <li>• Explains eligibility and how to source attendant care and/ or home support services to the customer</li> <li>• Reimburses customer for personal care services (as required)</li> <li>• Consult health care providers and customer to determine if/when services are no longer needed</li> <li>• Makes the referral for a repeat PCA if needed to ensure services are not provided longer than necessary if no other functional information is available</li> </ul>	<p>management tasks can safely be performed without assistance, and what cannot as a result of the MVA related injuries</p> <ul style="list-style-type: none"> <li>• Completes and scores the PCA Assessment</li> <li>• Communicates with the Recovery Specialist by phone if there are any urgent safety considerations that require attention or if there treatment recommendations</li> </ul>
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<b>Access to Caregiver Benefit</b>	<p>Determines eligibility for Caregiver Benefit based on OT assessment report</p> <ul style="list-style-type: none"><li>• OT referral for functional assessment and review of findings/recommendations</li><li>• Advises customer of their eligibility and how to access services, as well as limitations of same.</li></ul>	<p>Determines functional abilities related to childcare requirements</p> <ul style="list-style-type: none"><li>• Completes in-home assessment of abilities related to childcare</li><li>• Documents abilities and inabilities in the assessment report and highlights to the Recovery Specialist</li><li>• Provides treatment recommendations to facilitate resuming all pre-MVA caregiving duties</li></ul>
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