Senior Managers Response to Workload Committee Proposal

SSRS Workload Balance

The Enhanced Care leadership team takes concerns regarding workload distribution seriously and continues to assess SSRS capacity and staffing using multiple operational indicators. While claim pending is one data point, it is not, on its own, a reliable measure of workload or work effort.

Response to Question 1

"When and how will workload balance be instituted? How much longer are SSRS expected to wait?"

We do not plan to redistribute caseloads for the purpose of equalizing all SSRS pending to a fixed numerical average.

Article 5.09 requires the Corporation to make *reasonable efforts* to distribute workload evenly within the same job classification, not to equalize visible pending counts without regard to work effort, activity frequency, and volume. Workload balance must be assessed based on total work effort, not solely the number of active claims assigned to an employee.

In the existing process, work is distributed evenly using the Round Robin function on ClaimCenter and the Segmentation Workflow tool for files being transitioned between segments. Both methods account for vacations and leaves and ensure equitable distribution amongst employees in the same job grade.

In addition, the current SSRS operating model reflects the following realities:

- SSRS in the 0–4 month segment are managing:
    - A high volume of contact points (customers, HCP, employers etc)
    - Front-loaded early intervention activities, including employer engagement, RTW planning, and IRB information gathering needed for calculation.
    - High re-segmentation rates both to and from other areas and work effort associated with setting up and reviewing new claims
    - A high volume of early return to work focused activities
- These work effort drivers are not accurately represented by pending statistics.

We will continue to review workload balance through:

- Activity volumes
- Transfer rates and recovery outcomes
- Case management expectations in both groups
- The ClaimCenter Round Robin distribution system and the segmentation workflow, which equitably distribute files across role while accounting for vacations and leaves

This approach reflects our ongoing efforts to manage work effort and capacity from an operational and service-delivery perspective.

Response to Question 2

"Why are workloads outside the SPOC 0-4 month group not being analyzed and communicated?"

Workloads for all SSRS, including those outside the 0-4 month segment, are continuously monitored and analyzed on a much more holistic basis than solely through pending counts.

Analysis of SSRS workload includes, but is not limited to:

- Type and frequency of required case activities
- External dependencies (e.g., medical updates, employer response times)
- Activity volumes
- Transfer rates and recovery outcomes
- Case management expectations in both groups

Ongoing analysis will continue in efforts to refine case management standards across the full lifecycle of a claim. That work includes:

- Continued development of case management standards throughout the lifecycle of a claim
- Review of work effort expectations associated with defined activities
- Continued monitoring of staffing and capacity impacts

This work is operational in nature and will inform future refinements.

Response to Question 3

“Can the Corporation provide statistics showing claims distribution by Area?”

A combined area summary was recently shared in townhalls this past December. Claims distribution, characteristics and makeup are consistently being monitored and analyzed across areas, segments, and roles. This analysis leads to process changes and enhancements whenever it is operationally appropriate and necessary

It is important to emphasize that aggregate claims distribution statistics by Area do not, on their own, demonstrate workload inequity without appropriate context regarding:

- Claim lifecycle phase
- Activity expectations
- Transfer rates and recovery outcomes
- Work intensity variability

Summary Position

- The Corporation **does not agree** that equalizing pending caseloads to a single numerical average represents fair or reasonable workload distribution
- The 0-4 month SSRS model is based on work effort and case management standards and requirements, not preferential treatment
- Pending count is an incomplete measure of required work effort and does not reflect the complexities, time or effort required to manage claims effectively at different stages of the claim's life cycle
- The Corporation continues to meet its obligations under Article 5.09 through ongoing operational review and staffing oversight

The Corporation is committed to equitable, efficient, and sustainable workload distribution by continuously monitoring work effort across case management segments and making necessary adjustments to ensure effective service delivery, employee well-being, and positive recovery outcomes.