



Transitional Return to Work (TRTW)

Responsible Official:	Assistant Vice Chancellor and Chief Human Resources Officer
Responsible Office:	Human Resources - Benefits
Issuance Date:	5/1/2024
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Summary:	The Transitional Return to Work Program provides Temporary Work Assignments for eligible employees who are temporarily unable to perform their usual and customary job duties due to an industrial or non-industrial injury or illness.
Scope:	All staff, academic, represented, and non-represented employees.

Contact:	Ali Kalmin, Director – Benefits & Leaves
Email:	akalmin@ucmerced.edu
Phone:	(209) 201-9236

I. REFERENCES AND RESOURCES

UC Policy

- [Academic Personnel Manual](#)
- [Contract Articles: Employees covered by a Collective Bargaining Agreement](#)
- [UC PPSM 2.210: Absence from Work](#)
- [UC PPSM 70: Complaint Resolution](#)
- [UC PPSM 81: Reasonable Accommodation](#)

UC Merced Procedures

- [UC Merced- Local Procedures for Reasonable Accommodation](#)

Resources

- [Human Resources - Benefits Website](#)

II. PROCEDURE SUMMARY & SCOPE

The Transitional Return to Work Program provides Temporary Work Assignments for eligible employees who are temporarily unable to perform their usual and customary job duties due to an industrial or non-industrial injury or illness. The Transitional Return to Work Program engages the department and Human Resources in the most effective manner by ensuring that employees who have injury or illness are returned to their jobs as early as medically feasible.

Effective management of health-related employee absences minimizes workforce disruption, maintains employee productivity, and various costs associated with disabilities. Early intervention, such as the identification of temporary modified work options, is likely to decrease the employee's time off from work and provides positive reinforcement of the employee's effort toward recovery and return to a productive work life.

III. DEFINITIONS

Functional/Physical Limitations: Restriction or lack of ability to perform an action or activity in the manner or within the range considered normal that results from impairment.

Temporary Work Assignment: An assignment of new or modified duties for a short duration (90 calendar days) which complies with all medical restrictions indicated by the employee's health care provider, to meet temporary organizational needs.

Transitional Return to Work Plan: Formal documentation of the Temporary Work Assignment made to allow an employee to return to work safely based on the treating health care provider's temporary restrictions.

IV. PROCEDURES

A. TRANSITIONAL RETURN TO WORK PROCESS

1. The employee informs their manager/supervisor or Benefits Analyst of the need for a Temporary Work Assignment and/or provides documentation from a health care provider listing any Functional/Physical Limitations. This Temporary Work Assignment may also be considered for employees requesting to phase out of work prior to taking any leave of absence.
2. The supervisor will review the request with the Benefits Analyst.

3. The supervisor will define the physical requirements and essential functions of the employee's position as outlined in the job description or other documentation.
4. The supervisor and Benefits Analyst will determine if a Temporary Work Assignment can be granted pending any further information gathered through the Transitional Return to Work process and/or a final determination of a Temporary Work Assignment, approved with modifications, and/or of any alternative solutions pending further review.
 - a. Any work should be consistent with the temporary medical restrictions and be assigned within the employee's department for up to 90 calendar days or until the employee is sufficiently recovered to return to their original job, whichever occurs first.
 - b. At the university's discretion, the 90-day period of time may be extended.
 - i. Note for extensions: For full-time employees whose regular work shift exceeds eight hours, 360 work hours is the maximum allowance. Part-time employees are subject to the 90-calendar-day limitation.
 - c. If an employee's home department cannot provide a Temporary Work Assignment compatible with the temporary work restrictions, an employee may be reassigned to another department for a period of up to 90 calendar days. The salary for the Temporary Work Assignment in another department shall be borne by the employee's home department. Extension of the 90-day Temporary Work Assignment in another department is at the discretion of the university.
 - d. If an employee, exempt or non-exempt, is released to a reduced work schedule, e.g., four hours per day, wages will be paid for the hours worked.
 - e. If an employee has not fully recovered at the end of the maximum period, the supervisor/manager, in consultation with the Benefits Analyst, will evaluate the employee's capacity for work. Further options will be determined at the university's discretion.
 - f. No Temporary Work Assignment described or covered under these guidelines is intended or offered as a permanent assignment.
 - g. If the Temporary Work Assignment resolution is not effective, the department and Benefits Analyst will reengage in the Transitional Return to Work process steps.

B. COMPLAINT PROCESS

1. Upon the completion of the Transitional Return to Work process, the employee may discuss their concerns with their immediate supervisor. If the concerns cannot be resolved, they may escalate their concerns as follows:
 - a. Represented employees may file a grievance pursuant to the requirements and procedures detailed in the applicable collective bargaining agreement.
 - b. Academic appointees may file a complaint pursuant to the Academic Personnel Manual.
 - c. Non-represented employees may file a complaint pursuant to PPSM 70.

Staff, faculty, student employees and/or applicants for employment who believe they have been discriminated against due to a [protected category](#) may file a complaint with the [Office for Prevention of Harassment and Discrimination \(OPHD\)](#). Retaliation or harassment against a person who files a complaint of discrimination, participates in an investigation of such a complaint, or opposes an unlawful employment practice is prohibited. An employee who believes they have experienced retaliation may file a complaint with OPHD.

V. RESPONSIBILITIES

A. EMPLOYEE

1. Provide their supervisor and/or Benefits Analyst with initial and ongoing status of their capability to work, including documentation from their health care provider about Functional/Physical Limitations, approximate duration, and expected date of their return to work full duty.
2. Discuss work-related information regarding medical status with direct supervisor and/or Benefits Analyst, including any scheduled appointments.
3. Obtain additional information, as necessary, about Functional/Physical Limitations from health care provider.
4. Accept a Temporary Work Assignment when a modified/alternate job assignment is found. In the event of a work-related injury, temporary disability benefits cease if an offered assignment is turned down without good cause (e.g., not interested in the duties of the assignment).

5. Abiding by the completed Transitional Return to Work Plan agreement (Appendix 1).

B. EMPLOYEE'S SUPERVISOR

1. Provide Temporary Work Assignment within the department upon receipt of the employee's Functional/Physical Limitations or documenting the reasons why a Temporary Work Assignment is not available.
2. Notify the Benefits Analyst immediately of updated employee Functional/Physical Limitations and/or return to work status.
3. Monitor Temporary Work Assignment duration and follow up on status updates every 30 days (not to exceed 90 days unless discussed with Benefits Analyst).
4. Review and complete necessary paperwork with the employee. Upon completion, provide a copy of the signed documentation to the employee and Benefits Analyst.

C. DEPARTMENTAL SUPERVISOR OF ANY DEPARTMENT TO WHICH THE EMPLOYEE IS REASSIGNED TO WORK

1. Ensure that the work provided is consistent with the specified restrictions.
2. Notify the Benefits Analyst and primary supervisor immediately of updated employee Functional/Physical Limitations and/or Return to Work status.
3. Monitor Temporary Work Assignment duration and follow up on status updates every 30 days (not to exceed 90 days unless discussed with Benefits Analyst).
4. Review and completing necessary paperwork with the employee. Upon completion, provide a copy of the signed documentation to the employee and Benefits Analyst.

D. BENEFITS ANALYST

1. Provide Temporary Work Assignment consultation and services to all active staff, academic, and student employees with work related and non-work related incurred injuries or illnesses.
2. Provide consultation and guidance to the supervisor and employee of the process, including any status updates received directly by the Benefits Analyst.
3. Communicate work status to third party administrators (e.g. Workers' Compensation and Disability Administrators).

VI. PROCEDURE REVISION HISTORY

Date	Action/Summary of Changes
5/1/2024	Original procedure issued

APPENDICES

APPENDIX 1: TRANSITIONAL RETURN TO WORK PLAN AGREEMENT

APPENDIX 2: EMPLOYEE INFORMATION SHEET

APPENDIX 3: SUPERVISOR INFORMATION SHEET

TRANSITIONAL RETURN TO WORK PLAN AGREEMENT

As part of the Transitional Return to Work program, UC Merced provides temporary transitional return to work (TRTW) assignments for eligible employees. These assignments are for employees who are temporarily unable to perform their usual and customary job duties due to an industrial or non-industrial illness or injury and agreed upon a temporary work assignment. This TRTW plan formally documents the temporary assignment made in order to allow the employee to return to work safely based on the treating Health Care Provider's temporary restrictions. TRTW assignments may last up to 90 days. (Extension will be considered on a case-by-case basis). **Fax or scan the completed forms to the Benefits Analyst @ 866-981-7732 or benefits@ucmerced.edu.**

Employee Name:	Job Title:
Supervisor Name:	Department:
Temporary Work Assignment Start Date:	
Temporary Work Assignment End Date:	

Your health care provider has indicated the temporary work restrictions listed below:

Temporary Work Assignment – Provide details regarding duration and specifics of the temporary work assignment (attach additional sheets if necessary):

Employee's Responsibilities:

- Observe all work, attendance, and safety rules at the TRTW location.
- Work within the restrictions recommended by the Health Care Provider.
- Notify supervisor of medical and related treatment appointments three (3) days prior to the appointment and schedule appointments during non-work hours when possible.
- Contact supervisor prior to beginning of shift if unable to work for any reason.

Supervisor's Responsibilities:

- Ensure that duties assigned are within the restrictions.
- Contact the Benefits Analyst immediately in the event of performance or attendance problems.
- Contact the Benefits Analyst if employee is unable to work or leaves prior to their end of shift due to the industrial related injury.

By signing this agreement, the employee and supervisor acknowledge their responsibilities and agree to follow the restrictions listed. The purpose of the temporary work assignment is to provide UC Merced employees the opportunity to continue to work while recovering from an injury or an illness. The Transitional Return Work Plan does not represent a permanent change in the employee's job description. If any problems develop during the period of this agreement, it is important to address them through open and supportive communication. If assistance is needed contact the Benefits Analyst at <PHONE NUMBER>.

Employee Signature

Date

Supervisor Signature

Date

Transitional Return to Work Program - Employee Information Sheet

UC Merced values its employees and their contributions; and therefore, strives to provide an injured, ill, or disabled employee the opportunity to return to temporary or transitional work as soon as their condition permits. Transitional work allows an employee with temporary work restrictions to work in a modified, alternative, or reduced-hours capacity, for a defined period of time, while recuperating from an injury or illness. In most cases, transitional work has a positive impact on an employee's recovery, while transitioning back to regular work.

In your case, your treating health care provider has released you to transitional work. You and your supervisor will review whether your restrictions can be accommodated, and if so, the details of the temporary work assignment will be written into a Transitional Return to Work Plan agreement, so you will both have a clear understanding of your job duties and/or work restrictions. Depending on the nature of your work restrictions, your transitional work may not be that different from your regular job. Please remember that this is not a permanent position; it is only temporary.

If your temporary work assignment is full-time, you will receive your regular pay and benefits. If you have been released to work only on a part-time basis, your pay, benefits, and hours will be adjusted accordingly. A Benefits Analyst can help you determine how your pay and benefits will be affected if you return to work on a part-time basis.

To ensure a successful transitional return to work, your cooperation is vital. You need to be an active participant in this process to make it work. Therefore, the following provides some guidelines for you to follow:

- Follow the work restrictions recommended by your health care provider. If asked to perform a task that exceeds your restrictions or you feel unable to perform a task, it is your responsibility to immediately notify your supervisor.
- Follow all work and safety rules at the location of your temporary work assignment.
- Total working hours are not to exceed health care provider recommendations or pre-injury appointment.
- Notify your supervisor if unable to report to work for any reason.
- Attempt to schedule appointments at a time when you are not scheduled to work. If you must leave work, you must receive prior approval from your supervisor.
- Perform your temporary work assignment in a professional and responsible manner.
- Notify your supervisor immediately, and provide documentation, if your health care provider:
 - Takes you off work
 - Changes your work restrictions
 - Releases you to regular work without work restrictions

If you have questions or concerns about the Transitional Return to Work Program, please contact your supervisor or the Benefits team at benefits@ucmerced.edu.

Transitional Return to Work Program – Supervisor Information Sheet

The supervisor plays a very important role in the recovery of an injured/ill/disabled employee. One proven way of increasing an injured/ill/disabled employee's recovery time is allowing them to return to work with temporary restrictions. A quicker recovery period often results in earlier return to regular job duties, which benefits both the employee and department.

The process in which to accomplish this return to work is UC Merced's Transitional Return to Work Program. This program allows an employee with temporary work restrictions to work in a transitional position, for a defined period of time (up to 90 days), while recovering from an injury or illness. Transitional work can be:

- **Modified Work:** Changing or eliminating specific job duties within the employee's regular job to meet the temporary work restrictions.
- **Alternative Work:** Offering the employee a position other than their regular job to meet the temporary work restrictions.
- **Reduced Hours Work Schedule:** Offering less than full-time work to meet the temporary work restrictions.

The success of a Transitional Return to Work Program relies on the collaborative efforts between the employee and supervisor. Both parties need to be a part of this process to ensure success. The following is representative of the Transitional Return to Work process:

- Treating health care provider releases employee to transitional/temporary work.
- Treating health care provider provides work restrictions in writing to the employee.
- Employee provides work restrictions to supervisor.
- Supervisor and employee engage in an interactive dialogue to discuss possible temporary job modifications, alternative work, and/or reduced hours work schedule.
- Supervisor and employee discuss the plan with a Benefits Analyst as required to develop a temporary work assignment, to include a start date.
- Transitional Return to Work Plan Agreement is completed once the details of temporary work assignment have been agreed upon.
- Supervisor reviews Transitional Return to Work Plan Agreement with employee.
- Supervisor reviews Employee Information Sheet with employee.
- Supervisor and employee sign and date the Transitional Return to Work Plan Agreement. A copy should be retained by each. A signed copy must be sent to Benefits Analyst for recordkeeping.
- Employee starts the temporary work assignment as agreed upon.
- Supervisor monitors and documents the status of the employee's return to work.
- Supervisor reviews the progress of the temporary work assignment with employee at an agreed upon date and advises the Benefits Analyst.