

**Virginia Conference
Joint Committee on Clergy Medical Leave
Process for Granting Medical Leave
Applying for Disability Benefit**

BACKGROUND:

Guidance on granting Medical Leave and applying for Disability Benefits can be found in ¶357, 2020/2024 UMC Book of Discipline.

The Virginia Conference Joint Committee on Clergy Medical Leave comprises members and staff from the Conference Board of Ordained Ministry, the Virginia United Methodist Pensions, Inc., and the Cabinet. It is responsible for overseeing the Medical Leave and Disability Benefits process.

Obtaining Medical Leave and Disability Benefits involves two decisions and has separate qualifying criteria.

- Medical Leave. Upon recommendations of the Joint Committee on Clergy Medical Leave and approval of the Conference Board of Ordained Ministry and the Virginia United Methodist Pensions, Inc. and by a majority vote of the executive session of clergy members in full connection, clergy may be granted annual Medical Leave without losing their relationship to the annual conference. Between sessions of the annual conference, Medical Leave may be granted by the bishop for the remainder of the conference year, with approval of a majority of the district superintendents, after consultation with the executive committees of the Conference Board of Ordained Ministry and the Virginia United Methodist Pensions, Inc.
- Disability Benefits. Virginia United Methodist Pensions, Inc. administers the clergy application for Disability Benefits. *However, Wespath is solely responsible for determining one's eligibility to receive Disability Benefits.*

Having made these distinctions, it is essential to know that to receive Disability Benefits from Wespath, one must be placed on Medical Leave. On the other hand, one may be placed on Medical Leave, yet not be approved to receive Disability Benefits.

PROCEDURES FOR MEDICAL LEAVE AND DISABILITY BENEFITS:

The process of applying for Medical Leave and Disability Benefits has been combined into this single document and is as follows:

1. In the event of a request for Medical Leave, the clergy applicant must request the change in status and appointment to Medical Leave by contacting their District Superintendent, the Bishop, the Office of Clergy Excellence, and the Office of Pensions and Benefits. They will attach the completed form to this email request: "Conference Relationship Request Related to Medical Disability." This form can be found at <https://vaumc.org/clergymedicalleave/>
2. If the clergy person is currently enrolled in the Comprehensive Protection Plan (CPP), the District Superintendent will request that Virginia United Methodist Pensions, Inc. forward a Disability Benefit "Claim Packet" consisting of numerous Forms required by Wespath to his or her clergy applicant.
 - a. The "Claim Packet" must be completed and the applicable forms forwarded to the appropriate entities as follows:
 - i. The clergy applicant completes the "Comprehensive Protection Plan Certification of Employee Disability Form" (included in the Claim Packet) and sends it directly to Wespath.
 - ii. The clergy applicant completes and forwards "Form A" (included in the Claim Packet) directly to Wespath.
 - iii. The clergy applicant completes the "Direct Deposit Form" (included in the Claim Packet) and sends it directly to Wespath.
 - iv. The clergy applicant completes and forwards "Form C" (included in the Claim Packet) to the District Superintendent for approval and signature.
 - v. The District Superintendent forwards "Form C" to the Virginia United Methodist Pensions, Inc. to initiate the application for Disability Benefits.
 - vi. Virginia United Methodist Pensions and Benefits, Inc. notifies the chair of the Joint Medical Committee of the Board of Ordained Ministry of the application and secures the signature of the chair of "Form C."
 - vii. The chair of the Virginia Conference Joint Committee on Clergy Medical Leave will review the request for a change in status to Medical Leave and call the clergyperson for a phone interview.

- viii. The chair of the Joint Committee on Clergy Medical Leave sends the applicant a letter outlining the available procedures and support systems. The letter will include “Disability Application Process: Tips” and a timeline for getting reports to Wespath.
 - ix. The Virginia United Methodist Pensions, Inc. forwards “Form F” to Wespath to establish an open file on behalf of the clergy applicant.
- b. A person under consideration for medical leave shall have the right to appear before the Joint Committee on Clergy Medical Leave or designate someone to meet with the committee on his or her behalf. In the event of unresolved issues, a person will be ensured fair process rights for administrative hearings in ¶362.2. Alternatively, the District Superintendent, Virginia United Methodist Pensions, Inc., the chair of the Joint Committee on Clergy Medical Leave, and the Director of Clergy Excellence may confer to determine if a face-to-face interview is needed with the applicant. If an applicant is to be interviewed in person, the Director of Clergy Excellence contacts the applicant to make arrangements for the interview.
- c. The Virginia Conference Joint Committee on Clergy Medical Leave may recommend to the Virginia Conference Board of Ordained Ministry and the Virginia United Methodist Pensions, Inc. that the clergy applicant be placed on Medical Leave.
 - i. If the clergy applicant is granted disability benefits, the Joint Committee on Clergy Medical Leave will recommend Medical Leave.
 - ii. If the clergy applicant is denied disability benefits, the clergy applicant may request Medical Leave without benefits, voluntary personal leave of absence, or an appointment.
 - iii. A clergy applicant requesting personal leave of absence will be interviewed by the Conference Relations Committee which recommends to the Board of Ordained Ministry. A clergy applicant requesting an appointment contacts his/her district superintendent.
- d. Wespath may pay Disability Benefits up to the first 90 days following the receipt of the completed “Claim Packet” while Lincoln reviews the application for long-term Disability Benefits.
- e. Information obtained by the Joint Committee on Clergy Medical Leave is held in the strictest confidence. Additionally, the Joint Committee on Clergy Medical Leave may not obtain Personal Health Information (PHI) which will be protected in accordance with The Health Insurance Portability and Accountability Act of 1996 (HIPAA) as administered by the Virginia United Methodist Pensions, Inc.
- f. Coming off of medical leave requires the applicant to complete the “Request to

come off Medical Leave Form” and an in-person interview with the Joint Medical Committee.