

**GENERAL INSTRUCTION MANUAL**

ISSUING ORG. STAFFING SERVICES DEPARTMENT

ISSUE DATE 06/14/2011 REPLACES 04/01/2010

SUBJECT PROCEDURE FOR TERMINATION OF SERVICES OF SAUDI  
EMPLOYEES WITH CHRONIC MEDICAL CONDITIONSAPPROVAL DAE PAGE NO.  
1 OF 6**CONTENT:**

This Instruction outlines the procedures to be followed in processing termination of services of Saudi employees with Chronic Medical Conditions (CMC), and the benefits that CMC employees are entitled to receive from the Company.

The text includes:

1. Definition of CMC
2. Eligibility
3. Responsibility of Employee's Organization
4. Responsibility for Submission and Coordination
5. Processing of CMC Cases
6. Responsibility of Occupational Health Section (OHS) of SAMSO
7. CMC Review Panel
8. Termination of Services
9. CMC Benefits
10. Other Information

**1.0 Definition of CMC:**

An employee is a candidate for the CMC Program if he/she is unable to perform the major components of the duties required by his/her job due to a prolonged and continuing illness (known herein as a Chronic Medical Condition), either physical or mental, from which the employee is unlikely to significantly recover.

**2.0 Eligibility:**

- 2.1 To be eligible for termination under the CMC Program, the employee should meet all of the following conditions:
  - 2.1.1 Be a Saudi employee.
  - 2.1.2 Have at least five (5) years of continuous service with the Company and be less than 60 years of age Gregorian.
  - 2.1.3 Employee should have been submitted as a releasable employee by their line organization to Staffing Services Department (SSD).
  - 2.1.4 Employee's performance should be rated 'D' due to his/her observed medical condition.
  - 2.1.5 Should meet the CMC criteria by the OHS of SAMSO.
- 2.2 Disabled persons employed under the Vocational Rehabilitation Program as per the Labor Law requirements, will not be eligible for termination under the CMC Program, unless the new disability is caused by an unrelated condition after employment.
- 2.3 CMC is not a voluntary program. Personnel Department provides required assistance in case of employee refusal and deals with such cases in the same manner as dealing with refusal of other Company option termination cases.

**3.0 Responsibility of Employee's Organization:**

- 3.1 Employees identified for consideration under the CMC program will initially have been submitted by their line organization to the Releasable Manpower Program coordinated by the Internal Staffing Division (ISD/SSD).
- 3.2 After being informed in writing by ISD/SSD that an employee is being submitted to the CMC program, the employee's department head should take the following actions:
  - 3.2.1 Forward, but not limited to, the following documentation as requested by the ISD/SSD:
    - 1) Completed 'Physical Requirements and Working Conditions' form.
    - 2) Any medical reports submitted by the employee.
  - 3.2.2 Ensure that a Home Loan application is not processed for the employee if the employee has not previously participated in the Home Ownership Program.
  - 3.2.3 Inform the employee that he/she is being submitted to the CMC Program.
  - 3.2.4 As scheduled by ISD/SSD, direct the employee to attend the medical evaluation appointment with the OHS.

**GENERAL INSTRUCTION MANUAL**

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04/01/2010SUBJECT PROCEDURE FOR TERMINATION OF SERVICES OF SAUDI  
EMPLOYEES WITH CHRONIC MEDICAL CONDITIONSAPPROVAL  
DAEPAGE NO.  
2 OF 6**4.0 Responsibility for Submission and Coordination:**

The Administrator, Internal Staffing Division, Staffing Services Department shall be responsible to coordinate all activities related to CMC cases, with employee's department, Occupational Health Section, CMC Review Panel and any other agencies.

4.1 Releasable employees with a recent history of medical issues which have significantly affected the employee's capacity and ability to perform his/her current job assignment satisfactorily will be forwarded by ISD/SSD to OHS for a preliminary medical evaluation.

4.2 ISD will forward the following documentation to OHS to schedule the employee for a preliminary medical evaluation:

4.2.1 Preliminary Medical Review form

4.2.2 Completed 'Physical Requirements and Working Conditions' form.

4.2.3 Copy of employee's Job Description

4.2.4 Medical time record

4.2.5 Any medical reports provided by the employee or his Supervisor on his/her behalf.

4.3 If requested by OHS, ISD will initiate Medical Examination Request form 3941 and obtain an appointment from the OHS for a CMC medical evaluation of the employee.

4.4 ISD will advise the employee's department head in writing that the employee is being considered for the CMC program and request that the employee attends the scheduled OHS appointment.

4.5 If an employee, in the opinion of OHS, potentially meets the medical criteria for consideration under the CMC program, OHS will complete the Preliminary Medical Review form accordingly and forward to ISD.

4.6 If an employee, in the opinion of OHS, does not meet the medical criteria for consideration under the CMC program, OHS will indicate on the Preliminary Medical Review form accordingly and return the form to ISD, summarizing the reasons why the employee does not meet the CMC criteria and highlighting any medical limitations, if any, that should be considered by ISD/SSD in the redeployment of the employee.

**5.0 Processing of CMC Cases:**

5.1 Following receipt of the Preliminary Medical Review form from OHS indicating that an employee potentially meets the medical criteria for consideration under the CMC program, ISD will prepare the following documentation and forward to OHS:

5.1.1 Formal letter requesting OHS for medical assessment and confirmation or otherwise of the employee's eligibility for termination under the CMC Program.

5.1.2 Completed 'Physical Requirements and Working Conditions' form.

5.1.3 Completed Medical Examination Request form SA3941

5.1.4 Copy of employee's Job Description

5.1.5 Sickness and attendance record

5.1.6 Any medical reports submitted by the employee or his/her Supervisor

5.2 If requested by OHS, ISD will schedule an appointment with the OHS for a CMC medical evaluation of the employee. ISD will advise the employee's department head in writing that the employee is being considered for the CMC program and request that the employee attends the scheduled OHS appointment.

5.3 If an employee, in the opinion of OHS, does not meet the medical criteria for consideration under the CMC program, OHS will advise ISD in writing, summarizing the reasons for the employee not meeting the CMC

**GENERAL INSTRUCTION MANUAL**

ISSUING ORG. STAFFING SERVICES DEPARTMENT

ISSUE DATE 06/14/2011  
REPLACES 04/01/2010SUBJECT PROCEDURE FOR TERMINATION OF SERVICES OF SAUDI  
EMPLOYEES WITH CHRONIC MEDICAL CONDITIONSAPPROVAL DAE  
PAGE NO. 3 OF 6

criteria and highlighting medical limitations if any, that should be considered by ISD in the redeployment of the employee. ISD/SSD will advise the employee's department head in writing of OHS' decision.

5.4 If the OHS declares in writing that an employee meets the medical criteria for consideration under the CMC program, the Administrator, Internal Staffing Division will take the following actions:

- 5.4.1 Review the documents and verify the data to ensure that the employee meets the CMC eligibility criteria.
- 5.4.2 ISD will advise the employee's department head in writing that the employee has been submitted to the OHS for consideration under the CMC program and that the OHS has declared that an employee meets the medical criteria for consideration under the CMC program.
- 5.4.3 Request a CMC profile for the employee for compliance verification.
- 5.4.4 Register the employee information in the CMC data base.
- 5.4.5 Schedule the case for review by the CMC Review Panel.
- 5.4.6 Schedule each employee case for review by the CMC Review Panel based on the date the case is received by ISD from OHS.
- 5.4.7 Prepare a brief summary on each employee for each member of the CMC Review Panel indicating an employee's job title, grade code, performance category, date of last promotion, M-time statistics and home loan balance prior to the meeting.

5.5 If the CMC Review Panel declares that the employee's case is accepted for CMC termination, ISD will request the employee's department head to submit the termination documents; Personnel Separation Request (SA Form 1180-C), on-line Departure Clearance and write-in time card for the last working month to the Personnel HR Service Center.

5.6 Retirement Advisor will counsel the employee and explain the benefits he/she is entitled to receive under the CMC program.

5.7 Termination of services of an employee, who is approved by the CMC Panel, should be actioned on the last day of the month following the month in which the CMC Review Panel approved the case. A minimum of 30 days termination notification will be given to the employee.

5.8 If the employee is found to have met the medical criteria for CMC termination by the OHS but later the case is rejected by the CMC Review Panel, ISD will inform the employee's department head in writing of the decision. In this situation, the employee's case can be resubmitted for re-review by the CMC Review Panel after two (2) years from the date of the CMC Review Panel decision or a shorter period to be designated at the discretion of the Director, Staffing Services Department.

5.9 Internal Staffing will provide Admin Areas and Business Lines with the CMC status reports for their respective organizations on a quarterly basis.

**6.0 Responsibility of Occupational Health Section of SAMSO:**

6.1 A minimum of three Occupational Medicine Specialists (OMS) are involved in the process of assessing a CMC candidate:

- 6.1.1 The selection of the first Occupational Medicine Specialist (OMS1) depends on the particular Occupational Medicine Specialist who is scheduled to see patients in the particular clinic on that day.
- 6.1.2 The assignment of the second Occupational Medicine Specialist (OMS2) and the third Occupational Medicine Specialist (OMS3) depends on the availability of the OHS and are determined generally by the OHS CMC Coordinator.
- 6.1.3 Each OMS is required to make an independent assessment on whether the CMC criteria are met and shall not be permitted to see the other OMS opinions. The outcome will be based on a scoring of three opinions i.e. 2 out of 3 meets/does not meet the criteria. This provides objectivity in the assessment process.

**GENERAL INSTRUCTION MANUAL**

ISSUING ORG. STAFFING SERVICES DEPARTMENT

ISSUE DATE 06/14/2011 REPLACES 04/01/2010

SUBJECT PROCEDURE FOR TERMINATION OF SERVICES OF SAUDI  
EMPLOYEES WITH CHRONIC MEDICAL CONDITIONSAPPROVAL DAE PAGE NO.  
4 OF 6

- 6.2 Before a case is submitted to the OHS for assessment, the OHS CMC Coordinator will review all information and ensure that contemporaneous medical reports are available from the treating specialist(s).
- 6.3 The OMS1 reviews the medical file, interviews the examinee and documents his examination findings and pertinent medical history. The OMS1 completes a CMC Summary Sheet with an opinion on CMC Criteria and returns the file to the OHS CMC Coordinator.
- 6.4 The CMC Coordinator removes the OHS CMC opinion given by OMS1 from the file and attaches a blank CMC Summary Sheet to the file. The OHS CMC Coordinator passes the file and blank Summary Sheet to OMS2.
- 6.5 The OMS2 reviews the examinee's medical documentations and renders an opinion whether the employee meets the CMC medical criteria, or the decision may be deferred pending the attainment of maximal medical improvement (MMI). The OMS2 may elect to refer the case back to OMS1 for additional medical information. The OMS2 completes a CMC Summary Sheet with an opinion on CMC Criteria and returns the file to the OHS CMC Coordinator.
- 6.6 The OHS CMC Coordinator removes the CMC opinion given by the OMS2 from the file and attaches a blank CMC Summary Sheet to the file. The OHS CMC Coordinator passes the file and blank Summary Sheet to OHS3.
- 6.7 The OMS3 reviews the examiner's medical documentation and renders an opinion on whether the employee meets the CMC medical criteria.
- 6.8 The OHS CMC Coordinator compiles all three summary sheets and passes the file to the Lead CMC Medicine Specialist who will be appointed by the Head of OHS. The Lead CMC OHS shall prepare a report approving a CMC application for inclusion in the submission to the CMC Review Panel. In the case of rejection, OHS will prepare a report to assist ISD determine the redeployment potential of an employee.
- 6.9 All CMC candidates should be screened for potential PTD claims by the Occupational Medicine Specialists prior to sending the final decision to Internal Staffing Division.
- 6.10 An OHS may re-submit the case, on behalf of a CMC candidate who was previously found to have not met the CMC criteria for medical termination and whose medical status has deteriorated, to the Occupational Health Section.
- 6.11 The CMC OHS, in exceptional cases, will contact Internal Staffing Division to suggest that an employee is considered for PTD when there is compelling medical evidence supporting permanent incapacity.
- 6.12 OHS should report any refusals for medical treatment or CMC evaluation to Internal Staffing Division and threats from CMC candidates to Industrial Security. ISD will report the refusals to employee's respective organization.
- 6.13 OHS should report the results of the medical evaluation of an employee to the Administrator, Internal Staffing Division, indicating in writing that an employee meets or does not meet the medical criteria for consideration under the CMC program.

**7.0 CMC Review Panel:****7.1 Objective:**

The objective of the Review Panel is to ensure that the program is administered fairly and in accordance with established guidelines and eligibility criteria.

**GENERAL INSTRUCTION MANUAL**

ISSUING ORG. STAFFING SERVICES DEPARTMENT

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04/01/2010SUBJECT PROCEDURE FOR TERMINATION OF SERVICES OF SAUDI  
EMPLOYEES WITH CHRONIC MEDICAL CONDITIONSAPPROVAL  
DAEPAGE NO.  
5 OF 6**7.2 Membership:**

The CMC Review Panel consists of permanent and observing members.

**7.2.1 The Permanent Members are:**

Director, Staffing Services Department, Member and Chairman  
 Director, Personnel Department or his representative, Member  
 Chief, Preventive Medicine Services Division or his representative, Member  
 Manager, Mechanical Services Shops Department or his representative, Member  
 Manager, Juaymah Gas Plant Department or his representative, Member  
 Administrator, Internal Staffing Division (Secretary - no voting rights)  
 Occupational Health Section CMC Coordinator (no voting rights)  
 Internal Staffing CMC Coordinator (no voting rights)

**7.2.2 The Observing Members:**

The Chairman of the CMC Review Panel, based on the Panel Secretary's recommendations, may invite up to three additional department heads as observing members at one or more of the CMC panel meetings. These department heads should come from organizations with employees lined up for review at the given CMC Panel meeting. The Chairman of the CMC Review Panel should write to concerned Admin Area(s) requesting a nomination two to three weeks prior to the CMC Review Panel meeting. These members have no voting power. However, they may answer questions related to job functions and tasks pertinent to their organizations.

**7.3 Functions:**

7.3.1 Reviews all cases in which an employee is declared as meeting the medical criteria for CMC termination by Occupational Health Section and referred to the CMC Review Panel under the CMC Program.

7.3.2 Reviews employee's work history, job description, performance category, promotion and other relevant information to determine whether the employee meets the eligibility criteria for termination under the CMC Program.

7.3.3 Deliberates on each case, requests additional information if needed, and approves the termination of services of those who meet the eligibility requirements.

7.3.4 Refers to SAMSO cases that may qualify for PTD.

7.3.5 Meets whenever requested by the Chairman of the Panel (Director, Staffing Services Department).

7.3.6 Panel's decision is based on a majority vote and is final.

**8.0 Termination of Services:**

8.1 When the CMC Review Panel approves the termination of services of an employee under the CMC program, Internal Staffing Division will initiate the termination process by requesting the employee's department head in writing to initiate termination proceedings.

8.2 Termination processing of all CMC employees is handled by the Personnel HR Services Center as follows:

8.2.1 Upon receipt of termination documents from the employee's department, the Retirement Advisor shall review the termination documents to ensure the correctness of data.

8.2.2 Inform the Social Services & Workmen's Compensation Unit about the CMC employee's status and request them to finalize his Workmen's Compensation claims, if any. 8.2.3 Review the employee's records to ensure that the employee does not have a Police/Court Stop letter or change of birth date.

**GENERAL INSTRUCTION MANUAL**

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ISSUE DATE  
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04/01/2010SUBJECT  
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EMPLOYEES WITH CHRONIC MEDICAL CONDITIONSAPPROVAL  
DAEPAGE NO.  
6 OF 6

- 8.2.4 Calculate employee's entitlements, deductions, etc. and process them through the SAP Final Settlement System (SAP-HR FSS).
- 8.2.5 Review and approve termination record from SAP-HR FSS and coordinate with Payroll Division for final settlement.
- 8.2.6 Contact Home Ownership & Community Development Division and Treasurer's Operations Division for forgiveness of Home Loan balance and surrender of house deeds for employees with home loans.
- 8.2.7 Direct the CMC employee to his/her Area Payroll office to collect final settlement checks and Saudi Riyal Thrift Plan checks after finalizing all requirements for the on-line departure clearance, explain the entitlements and deductions to CMC employee, update the Annuity Master File and update the Personnel File.

**9.0 CMC Benefits:**

Employees whose services are terminated under the CMC Program are entitled to the following benefits:

- 9.1 Supplemental monthly annuity to bring the monthly income up to 65% of his/her final monthly base salary, after taking into account primary Social Insurance annuity, if any, and the monthly annuity value of any industrial or non-industrial disability payments.
- 10.2 The greater of early retirement annuity or CMC annuity, if the employee is eligible for early retirement.
- 9.2 Forgiveness of any outstanding home loan balance.
- 9.3 Medical care for a period of one year after the termination of service to CMC annuitant and all his/her registered dependents will be provided at the same medical facility at which they were registered prior to termination. After the expiration of one year, medical coverage will be limited to the CMC annuitant and to his/her spouse(s) on record at the time of termination. Medical coverage will be for life at Medical Designated Facilities. The CMC annuitant has the same established rights to changing an MDF as that recognized for regular employees.
- 10.5 Full Severance Award in accordance with the Labor Law.
- 9.4 Company annuity stops upon the death of CMC annuitant, except for those who were eligible for early Retirement Benefits at the time of termination, in which case his/her dependents will be entitled to receive post retirement death benefits from the Company.

**10.0 Other Information:**

- 10.1 Employees terminated under the Chronic Medical Conditions (CMC) Termination Program will be issued ID cards and vehicles stickers as per related policies and procedures.
- 10.2 Employees terminated under the CMC Termination Program should not be re-employed by the Company as regular and/or contractor employees.
- \*\* 10.3 Organizations will not be required to relinquish the budget slots for employees terminated under the CMC Termination Program.

Approved: \_\_\_\_\_

Date: \_\_\_\_\_

**DEYA A. ELYAS**, Director  
Staffing Services Department