



*Occu-Med Employment Medical Evaluation Service
for ACWA-JPIA Workers' Compensation Member Districts
Step-by-Step Guide*

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Occu-Med Employment Medical Evaluation Service for ACWA-JPIA Workers' Compensation Member Districts

Executive Summary

ACWA-JPIA is proud to continue offering Occu-Med pre-placement medical evaluation and fitness-for-duty / return-to-work evaluation services to all Workers' Compensation Member Districts. Occu-Med has provided its service to public and private sector agencies, including water districts, for more than 35 years. Occu-Med's program significantly reduces worker injuries by identifying pre-existing medical conditions or physical limitations that may pre-dispose the applicant or employee to injury when performing the essential duties of the job.

The following are Occu-Med services available to ACWA-JPIA Workers' Compensation Member Districts.

Introduction

Occu-Med's *QA*² medical evaluation service (pronounced "Q-A-Too") and the Company's various ancillary services were developed in response to client need for effective post-offer / pre-placement and fitness-for-duty / return-to-work medical examinations.

I. Summary of Services & Fees

The fee for ACWA-JPIA Workers' Compensation Member Districts is included in your premium. This fee covers: a) Job Analysis for all selected job classes; b) Data analysis and the preparation of Job Profiles and Medical Examination Component Profiles for all job classes studied; c) Location and/or training of a medical clinic to provide exams (including providing the clinic with a copy of the "*Physician's Guide to the Occu-Med System*"); and, d) Client Orientation.

The scope of Occu-Med's service covers all work required for our medical examination review and reports and for our on-going consultation as listed:

- Review and evaluation of completed medical examinations with results sent to you on the same day the exam is received
- Written reports for each review undertaken for each applicant
- Employment Agreements for any employees placed with accommodations
- Additional review for applicants with medical or physical conditions requiring further testing or submission of additional information
- Explanation (by telephone and by letter) to prospective employees of additional medical information necessary for job clearance
- Submission of legally defensible hiring recommendations
- Assistance with reasonable accommodation recommendations
- Fitness-for-Duty & Return-to-Work evaluations utilizing Occu-Med's network of physicians
- RDQA services
- Consultation relative to pre-placement, return-to-work and fitness-for-duty issues
- Assistance with clinic performance issues, as needed
- Periodic reports documenting the results of Occu-Med's work, as requested
- Periodic reports documenting efficiency and timeliness of services provided by your selected medical provider, as requested

II. Medical Examination Scheduling

Simply submit a Medical Exam Requisition Form (attached) via e-mail to scheduling@occu-med.com or via fax to (800) 262-2863 and the District's applicant will be contacted for appointment availability within two (2) business hours of receipt of the referral. Your District will immediately receive an email or telephone confirmation of the appointment time and date once an appointment has been scheduled. Normally, the exam will be scheduled with your preferred medical provider; however, with your permission, exams can be scheduled at an alternative clinic nearby if the preferred clinic is booked beyond acceptable time periods. If you have any questions regarding the scheduling of a medical exam, please contact Occu-Med's Exam Scheduling Hotline at (559) 435-2800, extension 337.

III. Medical Examination Harvesting

Having scheduled the medical exam, and with knowledge of the length of time required to obtain results of the medical testing included in the exam (i.e., PPD skin test for tuberculosis takes 48 to 72 hours for results), Occu-Med contacts the medical provider to request, or "harvest," the exam results at the absolute earliest time that it should be ready for review. This service is currently saving Occu-Med clients approximately 50% in terms of turnaround time for exam results.

IV. EXAMQA

For all complete exams received by 4:00 PM, Occu-Med will provide a written recommendation and report to the potential employee's District by close of business the same day. For applicants who are deemed "CQ" (Conditionally Qualified, see Table below), an Employment Agreement will be provided with Occu-Med's report. For applicants who are deemed "RDQ" (again, see Table below), Occu-Med's RDQA process is initiated with the applicant and the District is simply notified that the process has begun. This reduces the risk of disclosure of protected personal medical information to the District that may, upon the submission of the additional medical information requested, be determined to be non-job-related and undesirable for the District to have received. For applicants who are deemed "DQ," a legally-appropriate report is submitted to the District documenting the specific justification for the disqualification and, additionally, informing the District of the requirement for it to consider Reasonable Accommodation (a process in which we encourage the District to involve Occu-Med) to determine whether there are any reasonable restrictions or accommodations that would permit the applicant to be placed. Periodic performance reports, addressing both clinic turnaround statistics and EXAMQA results, are available upon request. [Please see the Table below regarding specific recommendations.]

Details regarding Occu-Med's qualification recommendations are as follows:

Occu-Med's Qualification Recommendations

Please note that these are only recommendations and that the final placement decision remains with the District.

Medically Qualified ("MQ") – Applicant is a safe placement.

Conditionally Qualified ("CQ") – Applicant will be placed but has work restrictions or accommodations as outlined on the medical restrictions and/or reasonable accommodations page of the report. The specific restrictions or accommodations are always included as part of the Conditionally Qualified Medical Exam Summary Report.

Recommendation Delayed for Qualification (“RDQ”) – Applicant will be required to gather and provide further information regarding one or more medical conditions or physical limitations. This process is facilitated by Occu-Med via RDQA. The applicant is contacted on the day the issue is identified and informed that he/she has 10 business days to comply with the request for additional medical information (extensions of the time-frame can be granted at the District’s discretion).

Medically Disqualified (“DQ”) – Applicant has been deemed medically unsuited for the job for which they are applying. Occu-Med’s report outlining relevant issues will be attached.

V. Clinic Invoice Review

Occu-Med has evaluated more than 425,000 clinic invoices for pre-placement exams, and we have been absolutely appalled at our findings: a) more than 75% of invoices were initially submitted with inaccuracies (charges for tests not performed, wrong charges for testing performed, duplicate billings); and, b) nearly all of the incorrect invoices were inaccurate in favor of the clinic. Occu-Med requires the submission of an accurate invoice for payment, at which point we submit payment within our normal billing terms. Clients have informed us that this service alone has literally saved days of staff time. Another client, upon learning of this billing trend, audited the previous year’s invoices and was able to obtain a refund of more than \$3,000 for exams incorrectly billed during that period. For Members who elect to have Occu-Med schedule the examination with a clinic in our Preferred Network of over 5000 clinics, Occu-Med will submit to the District a monthly invoice for all medical examinations scheduled pursuant to a negotiated fee schedule that will show one cost for each exam. This invoicing is usually substantially discounted due to our National contract pricing and is a major improvement to the typical clinic invoice that shows an array of pricing for the medical components that comprise the medical exam for a particular job class. Occu-Med’s Clinic Bill Review service fee is free of charge to your District if Occu-Med schedules your District’s exams within our Provider Network.

VI. Additional Occu-Med Services

Fitness-for-Duty & Return-to-Work Evaluations

Fitness-for-Duty / Return-to-Work Evaluations of current employees have become a significant aspect of Occu-Med’s service to ACWA/JPIA member districts. We evaluate the employee’s specific situation to allow for an appropriate and legally defensible determination of his/her ability to continue performing the job or to return to the job – at either full or modified duty.

Occu-Med’s fitness-for-duty evaluation begins with an assessment of the factors that have resulted in the need for the evaluation. In most cases, a Job Profile for the job in question has been developed previously, so there is a thorough understanding of the specific essential duties of the job in question. Occu-Med then prepares a letter, to be made available to the appropriate physician or physicians, requesting specific, appropriate medical information that will be necessary to determine whether the employee continues to be an appropriate placement in the job, with or without accommodation. Occu-Med will assess whether to obtain necessary medical information from physicians previously treating the employee or to locate an independent physician or specialist to perform an Independent Medical Evaluation on the District’s behalf. [Please note that the medical review performed by Occu-Med physicians is covered through your membership with ACWA/JPIA. The cost for any necessary independent evaluation by outside specialists or sub-specialists is billed as a pass-through cost to the District.]

When the medical information requested by Occu-Med is received, Occu-Med's physicians evaluate it in conjunction with the requirements of the job to make a recommendation to the District. If the recommendation is that the employee be retained or returned to the job with work restrictions or accommodations, Occu-Med will prepare an Employment Agreement to be signed by the employee setting forth specific job restrictions with which the employee must comply. Thousands of such fitness-for-duty recommendations have been made to our clients, allowing for the efficient and appropriate transition of employees back into the workplace and resulting in a significant savings in workers' compensation and lost time costs for those clients.

To initiate a Fitness-for-Duty Evaluation simply submit an Evaluation Requisition Form (enclosed) to ffd@occu-med.com or via fax to (800) 262-2863. If you would like to discuss the specifics of a potential evaluation, please call Thomas Kanesaki at (559) 435-2800, extension 121.

Reasonable Accommodation Assistance

In Accordance with the Americans with Disabilities Act Amendments Act of 2008 and comparable state regulations, any employee who is found to be unable to continue working in his or her present position after undergoing a Fitness-for-Duty or Return-to-Work Evaluation must be provided with reasonable accommodation assistance from their employer. If after completion of a Fitness-for-Duty or Return-to-Work evaluation it is determined that the employee cannot safely return to his or her current job, Occu-Med can assist the District in analyzing possible alternative placement opportunities in a different job class. Occu-Med will work with the District to determine: a) essential job requirements; b) environmental factors of the job; c) effectiveness of possible accommodations; d) feasibility and reasonableness of possible effective accommodations; and, e) if desired, participation in Interactive Conferences with the employee.

Out-of-Area Testing

More and more Districts are looking at recruitment opportunities outside of their immediate area in order to expand their potential pool of candidates. In the past this meant that if a prospective employee was to be screened as part of the post-offer, pre-employment physical evaluation process, he or she would either have to use a relatively unknown physician in his or her local area or make an appointment with the District's preferred medical provider. Now, thanks to Occu-Med's Network of Medical Providers, this is no longer the only option your District has. Upon notification of an out-of-area applicant, Occu-Med will obtain approval for the exam cost from the District and advise the selected Medical Provider of the exam protocols and guidelines to ensure that the exam is conducted appropriately and efficiently. Upon receipt of the out-of-area medical exam, Occu-Med's EXAMQA evaluation is conducted.

Annual OSHA Respirator Questionnaire Review

If your District requires its employees to wear a respirator, compliance with the Occupational Safety & Health Administration (OSHA) annual respiratory questionnaire requirements is mandatory and must be reviewed by a physician or licensed healthcare professional. A medical evaluation is only required initially and can be conducted at the same time as the pre-placement medical evaluation. In subsequent years a questionnaire can be reviewed by Occu-Med which will assist the District in saving time and money from having to send employees to physicians and paying for otherwise unnecessary testing or evaluation. If additional testing is recommended by Occu-Med due to a positive finding on the questionnaire, Occu-Med will directly correspond with your employee to ensure confidential medical information is not submitted to the District. Occu-Med will work with your District regarding accommodations in cases where a medical condition places an employee's health at increased risk from wearing a respirator.



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Occu-Med Contact Information

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3. Fitness-For-Duty / Return-to-Work Evaluations
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4. Medical Network Management
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