

# What is Return-to-Work?

Return-to-Work is a proactive approach, endorsed by many health care providers, designed to help restore injured workers to their former lifestyle in the safest and most effective manner possible. A partnership among workers, union representatives, employers, and health care provider's stakeholders is developed in a collaborative effort to return the injured worker back to his or her pre-injury status.

Return-to-Work management is the simultaneous coordination of health care services, vocational rehabilitation, and claims development in a caring and cost-effective manner according to the worker's needs. A major benefit for both the injured worker and employer is the Return-to-Work focus on an earlier return to maximum work capacity than would be possible using a non-specialized treatment plan. A cooperatively developed Return-to-Work program assists the worker's recovery by making return to work part of the rehabilitation process. The development, implementation, and maintenance of your company's Return-to-Work program will also strengthen the workplace community through continued communication and one shared goal: the safe return to work of the injured worker.

As all the stakeholders fulfill their responsibilities, Return-to-Work programs can realize their full potential to:

- Reduce the financial burden on employers, on workers, and on the families of workers;
- Reduce the negative effects on workers by reducing the length of time off work;
- Allow unions to continue to protect the employment rights of their members;
- Allow the health care provider to develop more specialized treatment plans; and
- Provide support for the primary care provider in the return to work decision.

The Return-to-Work process restores a worker to the workplace as part of his or her recovery program. This maximizes treatments and minimizes long-term workers' compensation costs. The worker experiences quicker recovery and restoration of his or her lifestyle, and the employer experiences a better-managed compensation system.

The most important element in the creation of a Return-to-Work program is commitment. By consistently applying the procedures you've developed to each job-related injury or illness, you will be well on your way to saving money on your workers' compensation insurance costs.

# Why Introduce Return-to-Work Programs?

Workplace injuries, illnesses, and accidents are costly to employers, workers, and the compensation partnership. Although preventing injuries is the best way to protect workers and to control workers' compensation costs, employers and workers need a way to manage injuries if they occur. A Return-to-Work program assists in assuring that the worker obtains prompt medical care both during the initial stages of recovery, and during the subsequent return to productive employment. Workers want to maintain employment security by returning to work after an injury as quickly as possible and respond well when employers offer them an opportunity to resume job responsibilities.

A formal Return-to-Work program facilitates the development and implementation of an individualized Return-to-Work plan immediately after the occurrence of the injury/illness.

A Return-to-Work program promotes communication and establishes the roles of each participant. This enables all parties access to a documented process and to help resolve any difficulties.

Return-to-Work programs benefit all partners in the compensation system:

- Injured workers maintain employment security, seniority, and benefits and receive personalized and effective treatment;
- Employers retain experienced employees while reducing accident and workplace costs;
- Health care providers are supported in their decisions and treatment strategies;
- Unions maintain the employment rights of their members; and
- The workers' compensation system can manage rising health care costs and continue to provide high levels of benefits to injured workers and their dependents.

See: *Appendix A - Costs of Absence*  
*Appendix B - Itemized Benefits of a Return-to-Work Program by Stakeholder*

## **COSTS OF ABSENCE**

### **To Workforce:**

- Dealing with replacement workers
- Increased benefit costs
- Loss of potential income

### **To Employer:**

- Recovery of production
- Quality and hiring of replacement workers
- Lower morale
- Increased training costs
- Overtime
- Non-productive work time (associated with accident)
- Increased premiums
- Other non-recoverable costs

## **ITEMIZED BENEFITS OF A RETURN-TO-WORK PROGRAM BY STAKEHOLDER**

### **The Employer May Benefit By:**

- Reduced staff turnover and training costs by retaining experienced and knowledgeable workers.
- Ability to participate in and contribute to the rehabilitation process.
- Improved morale and employee relations by offering Return-to-Work plans for both work-related and non-work-related injury or illness.
- Minimized non-recoverable expenses such as employee benefits, the hiring and training of replacement workers, and the cost of inexperienced workers.
- Improved accident experience, which may be important for companies bidding on contracts.
- Completion of tasks that may have been delayed due to other priorities.
- Decreased the number of grievances and arbitrations.

### **Injured/Ill Worker May Benefit By:**

- Maintaining the employment relationship, which provides job security and financial independence.
- Minimizing the loss of physical fitness and muscle tone due to inactivity.
- Maintaining financial credibility. Financial institutions are uncomfortable about renewing mortgages and loans if their client is without a job.
- Maintaining in-house/company pension plans, medical benefits, dental plans, and group life insurance.
- Maintaining vacation/sick day benefits.
- Maintaining social contact and support from co-workers and friends.
- Focusing on their abilities and not their disabilities.
- Maintaining dignity and self worth by remaining productive.
- Maintaining necessary job skills.
- Alleviating feelings of dependency and lack of control.
- Being able to return earlier to a healthy and productive life.
- Reducing the amount of time for recovery.

### **Co-Workers May Benefit By:**

- Improved productivity because skilled and productive workers are kept on the job.
- Minimized accident costs, including workers' compensation costs as well as non-recoverable expenses such as employee benefits, the hiring and training of replacement workers, and the cost of inexperienced workers.
- Improved accident experience, which may be important for companies bidding on contracts.
- Completion of meaningful alternative duties that may not have otherwise been done due to other priorities.

### **The Union May Benefit By:**

- Preservation of jobs, seniority, benefits, and so on for injured/ill workers.
- Promotion of cooperative labor/management relations.
- Increased awareness that the union is there to protect workers' interests and well being.
- Decreased number of grievances and arbitrations.

### **The Health Care Professional May Benefit By:**

- Providing focused and coordinated treatment for the injured/ill worker through the Return-to-Work Program.

- Using the cooperative approach, which allows for more efficient use of health care resources, which are directed toward a specific goal - the return to work of an injured/ill worker.

**The Family May Benefit By:**

- Continued income.
- Reduced medical expense.
- Reduced impact on family relations.

**Support Networks such as Consultants, Community, and Friends May Benefit By:**

- Being able to provide more focused assistance and help.

# Steps to Creating a Safe Workplace Environment

Before developing a Return-to-Work policy, the employer needs to incorporate safety and health into all work processes. Properly conducted hazard inspections and well documented accident investigations provide employers and employees the tools necessary for potential reduction and prevention of workplace injuries and illnesses.

## **Safety Inspection**

Safety inspections examine your company's physical facilities looking for unsafe conditions, unsafe behaviors, housekeeping responsibility assignment, and the like. The purpose of this inspection is to identify workplace hazards and proactively develop safe practices for behaviors in safe and unsafe conditions *before* an injury occurs. The safety inspection also affords employers and employees the opportunity to work collaboratively to develop training and improve operations. In the spirit of cooperation, it is important to focus on fact-finding, not fault finding.

During a safety inspection, you need to pay particular attention to workplace equipment and processes and employee work practices, as well as workplace facility-wide hazards. Certain considerations for safety inspections would include making sure the individual conducting the inspection is experienced and knowledgeable with the facility and operations of your particular company; knowledgeable of relevant regulations, codes, and company policies; competent of the inspection steps; and capable of collecting, evaluating, and reporting the data.

Part of the design for the development of your safety inspection procedures should include a well-designed approach that is easily duplicated in successive inspections. Because the environment of the workplace is constantly changing, safety inspections should be regularly scheduled in specific increments throughout the year. Not only will this consistency assist with keeping safety first in the minds of employees, it will also demonstrate to staff that safety is a major priority from the highest executive down.

See: *Appendix C - General Sample Safety Rules*  
*Appendix D - General Housekeeping Rules*  
*Appendix E - Hazard Inspection Review*

**GENERAL SAMPLE SAFETY RULES**

- ◆ All accidents must be reported to your immediate supervisor.
- ◆ Any unsafe conditions must be reported to your supervisor.
- ◆ Your supervisor is responsible for having the conditions corrected.
- ◆ Safety goggles and respirators must be used or worn in designated areas or for designated activities.
- ◆ Appropriate work clothing and shoes must be worn.
- ◆ No running, horseplay, or scuffling is permitted.
- ◆ Do not stand or walk under suspended loads.
- ◆ Use of liquor or drugs is not permitted in the workplace and while performing workplace activities.
- ◆ Tripping hazards, such as air lines and electrical cords, should be moved to a safe location when not in use.
- ◆ Only authorized items, including pictures and notices, are to be placed on any wall or bulletin board.
- ◆ Do not store items on windowsills.
- ◆ Electrical controls or panels and fire extinguishers are to be kept clear at all times within all areas on, around, in front, and over.
- ◆ Keep all personal belongings in lockers or in the employee break area, not in work areas.
- ◆ Clean drinking fountains daily.
- ◆ Keep all work benches clean and clear of all personal belongings, fixtures, tools, spare parts, as well as odds and ends.
- ◆ Keep all machines clean and in proper repair and adjustment.
- ◆ Clean caution and hazard signs regularly.
- ◆ Clean and service protective face shields regularly.
- ◆ Safety glasses, hard-toed, and other types of personal protective equipment must be worn in designated hazard areas.
- ◆ Be aware of any chemicals and/or hazardous substances in the area.

## GENERAL HOUSEKEEPING RULES

- ◆ Passageways, storerooms, and service rooms must be kept clean and orderly.
- ◆ Workroom floors must be maintained in a clean and dry condition.
- ◆ Every floor, working place, and passageway must be kept free from nails, wires, holes, or loose boards.
- ◆ Store materials so that they will not fall.
- ◆ Clearances must be adequate for mechanical handling equipment in aisles, at loading docks, and through doorways.
- ◆ All permanent aisles and passageways must be clearly marked.
- ◆ Use the right tool for each job correctly.
- ◆ Keep tools in good working condition.
- ◆ Do not use damaged, worn, or defective tools.
- ◆ Do not use tools until you have been properly trained and authorized to do so.
- ◆ Do not remove machinery or equipment guards without authorization.
- ◆ Do not make repairs to tools or equipment guards without authorization.
- ◆ Inspect electrical extension cords and other wiring to be certain they are properly insulated.
- ◆ Do not use frayed or damaged cords.
- ◆ When using power tools on a scaffold or other locations where space is limited, get good footing, use both hands, keep cords clear of obstructions, and do not over-reach.
- ◆ Before changing drills, blades, or bits, or attempting repair or adjustment, make sure items are disconnected from the power source.
- ◆ Do not leave running tools unattended.

**REMEMBER, PROPER HOUSEKEEPING IS THE  
FOUNDATION FOR A SAFE WORK ENVIRONMENT!**

<b>Hazard Inspection Review</b>			
		<b>Completed By:</b>	
		<b>Date of Inspection</b>	
Acceptable ?	Electrical Hazards		Notes
		Are electrical cords in good condition w/ ground pins?	
		Are Ground Fault Circuit Interrupters installed near potentially wet locations?	
		Are all panel circuit breakers labeled as to their function?	
		Are all electrical circuits > 50 volts properly insulated or guarded?	
		Is three foot clearance maintained in front of panels?	
		Are lockout tagout procedures written and followed for each piece of equipment in the workplace?	
		Are qualified and authorized employees properly trained in electrical hazards and protective equipment?	
		Are electrical panels and circuits protected from wet conditions, unless specifically designed to be exposed?	
		Are extension cords used for temporary applications only?	
Acceptable ?	Fire & Life Safety		Notes
		Are combustibles (paper, trash, wood) minimized in and around the structure?	
		Are fire extinguishers available, inspected monthly, and unblocked?	
		Are employees trained annually in fire extinguisher use, if they are expected to use them?	
		Are emergency exits clearly marked by illuminated signs?	
		Is there an internal alarm system to notify occupants of an emergency condition?	
		Are evacuation routes posted?	
		Exit doors are not blocked or locked and they have panic hardware and are self-closing.	
		Is an emergency plan in place and have evacuation drills been conducted every 6 months?	
		Are ignition sources controlled and separated from combustibles? (Smoking, grinding, burning)	

		Is a hot work permit system in place?	
		Are suppression and detection systems tested regularly by an authorized inspector?	
		Are heating devices serviced regularly?	
		Are there provisions for emergency lighting?	
		Are walkways marked and clear?	
	Acceptable ?	<b>Flammable and Combustible Liquids</b>	<b>Notes</b>
		Is a class B fire extinguisher within 50' of the liquid?	
		Is the liquid stored in a metal safety can with a self-closing lid and flash-arresting screen?	
		Are containers bonded when dispensing flammable liquids?	
		Are flammable and combustible liquids stored in approved safety cabinets or designed storage rooms when not in use?	
		Are quantities of flammables and combustibles "in use" minimized to 25 gallons or 1 shift's use?	
		Where vapors may be present, are appropriate electrical installations provided (Class I, Div 1, 2)?	
	Acceptable ?	<b>Personal Protective Equipment (PPE)</b>	<b>Notes</b>
		Have requirements for PPE been reviewed for each task within the facility? (This must be documented for employers covered by OSHA)	
		Are employees complying with PPE requirements?	
		Do all PPE items meet the appropriate ANSI standard? (They will be labeled or stamped).	
		Are employees trained on use of the PPE including fitting, sizing, inspection, and cleaning? (Required by OSHA).	
	Acceptable ?	<b>Respirators</b>	<b>Notes</b>
		Are all respirator users (non-voluntary use) fit-tested annually?	
		Are all respirator users (non-voluntary use) trained annually?	
		If respirators are used, is a written program available and is a qualified program administrator in charge?	
		Are non-voluntary users of negative pressure masks medically cleared to use a respirator?	
		Have industrial hygiene tests been done in the areas where respirators are required, to document that the appropriate respirator has been selected?	
		Have change-out schedules for cartridge respirators been established and are employees following them?	
		Are emergency respirators inspected monthly?	
		Are users of tight-fitting respirators clean shaven?	

Acceptable ?		Noise	Notes
		Have employees been monitored for noise exposure in areas where noise is present?	
		Are engineering controls used to reduce noise in areas with noise exposures?	
		Are employees using hearing protection devices in areas where the noise levels reach 85 dab TWA?	
		If regulated by OSHA, is the noise standard (1910.95) posted in the work areas?	
		Are employees trained annually in noise exposure issues (if 85 dBA or above)?	
		Are employees given audiometric testing annually to detect changes in hearing (if 85 dBA or above)?	
		Is appropriate follow-up and counseling of the employee occurring if a threshold shift is recorded?	
Acceptable ?		Hazardous Chemicals	Notes
		Are all containers labeled as to their contents and hazards?	
		Are employees trained on the hazards of the chemicals they are working with? (Required annually if regulated by the State R-2-K)?	
		Are Material Safety Data Sheets (MSDS's) available in the workplace?	
		Is a written program on chemicals available? (OSHA and State requirement)	
		Are non-compatible chemicals separated?	
		Are any carcinogens or long-term chemical hazards present? Have substitutes been sought?	
		Are spill controls in place?	
		Are emergency eye washes and showers available and tested weekly where corrosives may be present? (e.g. battery acid)	
Acceptable ?		Tools and Equipment	Notes
		Are all rotating and moving parts covered by a guard or device that is in place and operable?	
		Is equipment secured to the floor (by weight or positive connection)?	
		Are tools and equipment in good repair?	
		Are warning labels and operational controls labels in place and legible?	
		Are air-lines, hoses, wires placed so as to avoid tripping?	
		Are tools being used in accordance with their intended purpose?	

Acceptable ?		Powered Equipment	Notes
		Are all powered industrial truck operators trained?	
		Are operators using seatbelts?	
		Are back-up alarms operable?	
		Is operating speed controlled?	
		Are forklifts' forks kept low to the ground while traveling?	
		Do operators slow and sound horn at blind intersections and corners?	
		Are equipment inspections being done?	
		Is equipment used within its capacity?	
		Are persons tied-off in articulating, elevating lifts?	
Acceptable ?		Fall Hazards	Notes
		Are railing systems (toeboard, mid-rail, top-rail) provided where fall hazards exist? (4' or higher requires protection per OSHA).	
		Are railings 42" high (+/- 3")?	
		Are stairways provided with railings (4 or more risers)?	
		Are scaffold systems used with rails and fully planked?	
		Are trained persons using scaffolds?	
		Are floor openings 1" or greater covered or otherwise protected?	
		Are covered floor openings in good repair, not causing tripping hazard, secured and adequate for twice the load?	
		Are ladder safety devices (preferred) or cages provided for fixed ladders exceeding 20 feet?	
		Are ladders being used properly (Three points of contact at all times, not on top step, fully open)?	
		Are floor surfacings rated for 0.5 coefficient of friction / slip index?	
		Are absorbent walk-off mats available and in good condition at doors?	
		Are roof drains directed away from walkways?	
		Are provisions for ice removal in place and effective?	
		Are floors cleaned where oils and grease can build-up?	
Acceptable ?		Ergonomics Hazards	Notes

		Are employees performing repetitive tasks?	
		Are employees performing high-force tasks? (lifting > 50 lbs., pushing, pulling)	
		Are employees in awkward positions or situations?	
		Are employees exposed to cool environments while performing their work?	
		Have any ergonomics injuries been reported (back strains, repetitive motion disorders, etc.)?	
		Are lift assist devices available, used?	
		If injuries and hazards are present, are controls in place to reduce hazards and is an ergonomics task force working on the exposures?	
	Acceptable ?	<b>Compressed Gases / Compressed Air</b>	<b>Notes</b>
		Are compressed air connections properly made? (retaining pins in place)	
		Are tools operating at recommended air pressures?	
		Are pressure tanks inspected by certified inspector and is State certificate posted?	
		Are compressed gas cylinders secured in an upright position with the valve protection cap in place and marked as to contents?	
		Are oxygen cylinders (fulls and empties) separated by 20' from gas cylinders, oils, fuels, or other hydrocarbons? (alternative fire wall separation is permitted)	
		Are gas/air lines in good condition and labeled?	
		Are pressure relief valves tested on a frequent basis?	
		Compressed air is not used for blowing off clothing?	
		Compressed air pressure is reduced to 30 psi closed tip pressure when used for cleaning?	
	Acceptable ?	<b>Medical</b>	<b>Notes</b>
		Are provisions in place for treatment of an employee's medical problem within 4 minutes?	
		Are CPR and First Certifications up to date?	
		Are Automatic External Defibrillators (AED's) available in the workplace?	
		Are first aid kits properly stocked and available?	
		Are emergency procedures and phone numbers posted in the workplace?	
		Are first aid trained personnel trained annually in blood borne disease hazards?	

		Is a bloodborne disease written program in place to cover workplace first aid personnel?	
	Acceptable ?	<b>Heavy Lifting Equipment</b>	<b>Notes</b>
		Are documented inspections available?	
		Are monthly inspections of running ropes on cranes being done and documented?	
		Is all lifting equipment marked with its capacity?	
		Are proper rigging techniques used when hoisting loads?	
		Do employees know the weights of the objects they are lifting?	
		Are all slings and rigging rated and marked with a capacity tag?	
	Acceptable ?	<b>Security Issues</b>	<b>Notes</b>
		Is entry into the facility secure? Do guests and visitors have a sign-in location?	
		Do employees confront unfamiliar persons?	
		Does the company have a weapons and threat policy in place?	
		Are confidential areas secured from access?	
		Are background checks performed on employees and security personnel?	
		Are inventory and accounting procedures in place to identify loss?	
		Are alarm systems operable and in place where appropriate?	
		Are visibility mirrors used in hidden locations?	
		Are security cameras used where appropriate?	
		Has local law enforcement participated in a security assessment?	
		Is on-going training provided to employees on workplace security?	
		Are computer resources password protected and procedures in place to control access?	
		Are the facility and parking lot well lit?	
	Acceptable ?	<b>Environmental Hazards</b>	<b>Notes</b>
		Have surfaces painted prior to 1970 been tested for lead content?	
		Where lead is present, is a program in place to address the handling of lead coated surfaces?	
		Have lower areas been tested for radon gas? (> 4 pci recommends remediation)	

		Is there any asbestos containing material (ACM) or presumed ACM? Has a survey been performed to assess potential for ACM?	
		Are all facility discharges permitted? (air, water, waste)?	
		Have chemicals been surveyed for potential human carcinogenicity? If these or OSHA regulated chemicals are used (Lead, Methylene Chloride, Cadmium, Asbestos, and others), are written programs, testing and monitoring systems in place?	
	Acceptable ?	Management Elements	Notes
		Is there a certified safety committee in the workplace?	
		Is safety performance tracked?	
		Are supervisors held accountable for safety performance within their department?	
		Are detailed accident investigations conducted or accidents and near-misses documented?	
		Are employees provided with on-going safety training and awareness?	
		Are new processes and facilities designed with a safety review process?	
		Is there a chemical evaluation program that controls chemical purchasing?	
		Does upper management wear PPE and comply with safety rules?	
		Does management enforce, encourage, and demand a safe workplace?	
		Is safety performance communicated to the employees?	
	Acceptable ?	Miscellaneous	Notes
		Is there adequate lighting on all shifts in all work areas?	
		Has the facility conducted a confined space survey, to determine if confined spaces are present? If confined spaces exist, are detailed policy and procedures available and followed for entry?	
		Are HVAC systems serviced regularly? Are areas of mold growth properly assessed by an industrial hygienist and remediated as appropriate?	
		<i>This form is not intended to identify all hazardous conditions that may occur within a workplace. It is only a small sample of considerations that should be taken into account when assessing for workplace hazards. A competent inspection can be provided by insurance loss control representatives, safety and health professionals with requisite experience and education, or a qualified consultant.</i>	

## **Accident Investigation**

Even the best safety inspection cannot guarantee your workplace to be 100% accident free. So, when accidents do occur, it is essential that an accident investigation procedure be in place and staff properly trained to prevent the same incident from reoccurring.

Accident (incident) Investigation - An organized process using *written procedures* that are applied every time an accident occurs regardless of its severity.

The purpose of the accident investigation is to determine the direct cause of the incident and to prevent similar occurrences by documenting facts, providing cost data, and reinforcing the joint labor-management commitment to safety in the workplace. Identifying the causal or contributing factors in a workplace accident provides the opportunity for these facts to be evaluated in order that corrective actions may be taken.

*See: Appendix F - Questions to Ask*

General steps to follow in an Accident Investigation:

- Be prepared
- Survey the scene
- Emergency response for the injured
- Secure the area
- Gather the evidence - photos, interviews
- Analyze the information - write a report
- Recommend changes - implement corrective action
- Follow-up

*See: Appendix G - Accident Investigation Tips  
Appendix H - Accident Investigation Procedure  
Appendix I - Internal Accident Investigation Form  
Appendix J - Educational Safety Inspection/Accident Investigation  
PowerPoint Presentation*

## **QUESTIONS TO ASK**

There are certain key questions that will help an investigator to complete a thorough investigation. The following will work in many instances.

1. Who was involved in the accident?
2. Were there any witnesses?
3. Where and when did the accident occur (specific location and time)?
4. Was there a fatality?
5. What injuries were sustained and by whom?
6. What was the victim doing at the time of the accident?
7. Was the victim authorized and qualified to do this operation?
8. Were approved procedures being followed?
9. Was the victim familiar with the job and procedures?
10. Is the job or process new to the area?
11. Were proper tools or equipment being used?
12. Was the proper supervision being provided?
13. Had the victim received hazard potential training prior to the accident?
14. What was the location of the accident?
15. What was the physical condition of the area when the accident occurred?
16. If there were witnesses, what were they doing at the time of the accident?
17. What immediate or temporary action could have prevented the accident or minimized its effect?
18. What long-term or permanent action could have prevented the accident or minimized its effect?
19. Had corrective action been recommended in the past but not adopted?
20. What equipment or property was damaged?
21. Did the accident involve a motor vehicle?
22. Did the employee exhibit any behavioral or physical signs or symptoms of drug or alcohol impairment?

Other questions may be needed, depending on the accident.

## **ACCIDENT INVESTIGATION TIPS**

- Accident investigation should be done promptly. This will help in collecting the most accurate information before conditions change.
- Ask questions first that focus on “what” happened. By concentrating on the events that occurred which relate “details” such as time, location, and objects involved in the early questioning, there is a better chance of getting factual data.
- Concentrate fact gathering on what caused the accident to occur and not on the result (injury or illness) of the accident. The same accident could have results that may range from near miss to fatality.
- Try to talk first with witnesses on an individual basis so their opinions will not be swayed by others.
- Use open-ended questions when interviewing witnesses to avoid influencing their opinion. For example, it would be better to ask a witness to “tell me what you saw,” rather than questions such as “do you think the injured person committed an unsafe act before the accident occurred?”
- Listen! It is difficult to avoid interrupting someone when you have a question, but let people explain what they saw or know in their own words, as completely as possible, before trying to ask more questions or clarify information.
- Try to gather your information with people at the actual accident scene. This will enable a clearer picture of the events that can be obtained while trying to recall what happened from an office interview.
- Get recommendations from people who do the same job. Ask what kinds of corrective measures might prevent a similar accident.
- Look at facts obtained to determine action that will eliminate or reduce the burden of the employee trying to “remember proper actions” or “being careful.” Whenever possible, take corrective actions that design out the hazard or physically guard the employee from the hazard if it can’t be removed.
- An accident report is most useful for one thing -- to provide information that can be used to keep a similar situation from occurring. Make sure your information is objective, factual, and followed through with appropriate corrective measures.

## **ACCIDENT INVESTIGATION PROCEDURE**

When an accident occurs, the investigator must act quickly. No two situations are alike, but normally the following is correct.

- A. Attend to the injured employee.
- B. Assess accident scene to determine if it is safe to enter.
- C. Secure the accident scene.
- D. Notify your immediate supervisor.

The amount of action will depend on the severity of the accident. Follow established company procedure. Begin your investigation as soon as possible.

Be objective -- Don't let emotions or your own opinions cloud your investigation. Proceed as follows:

- A. Interview everyone who saw or was involved in the accident, including the victim (may have to be done at a later date). Use this procedure:
  - 1. Put them at ease -- explain that you are finding facts -- not fault.
  - 2. Interview "on the spot" -- if possible.
  - 3. Interview each person separately -- group interviews create confusion.
  - 4. Encourage the person to tell "what they saw."
  - 5. Ask open-ended questions: "Why? What? Where? When? Who? How?"
  - 6. Repeat the story back for confirmation.
  - 7. End on a positive note.
  - 8. Keep the pipeline open. Some people will remember important facts later.
- B. Observe the accident scene -- Look for obvious defects in equipment, tools, the object causing the injury. In some cases photos or drawings may help.
- C. Record critical information promptly -- don't delay. Use a prepared form to help remember key questions.
- D. Gather facts, not opinions. Use them to identify activities that contributed to the accident.
- E. Make conclusions based on facts and knowledge, not suppositions.
- F. Make recommendations to correct physical hazards, revise job procedures, and identify employee-training needs.

## **INTERNAL ACCIDENT INVESTIGATION FORM**

**This form is an internal accident investigation document meant to facilitate, change, and improve the work environment for your employees. The investigation process is not fault finding and should not be used as an impetus for disciplinary action.**

These steps will help you investigate an accident and fill out the form:

1. Discuss the accident with the employee involved and with any witnesses. Be sure to question the why ~ what ~ where ~ when ~ who ~ how aspects of the accident.
2. Inspect the equipment or materials involved for conditions that could be made safer.
3. Study the job set-up and process of doing work. Could it be improved?
4. Is the employee involved suited for the job he/she is doing? Did he/she receive adequate training? Are there any other contributing factors/problems? (i.e. use of drugs or alcohol, or emotional problems)
5. Recommendations to correct the problem must be practical. Be sure your recommendations will not create other situations, which could result in injury to employees.
6. Use the form to organize information gathered from your observations and interviews.
7. Complete your investigation report no later than the next working day after the accident.

**Accidents Don't Have to Happen!**

ACCIDENT INVESTIGATION FORM

Employee Involved \_\_\_\_\_ Dept. \_\_\_\_\_  
Employee # \_\_\_\_\_ Employment Status P/T F/T Temporary Shift \_\_\_\_\_  
Date of Accident \_\_\_/\_\_\_/\_\_\_ Time \_\_\_\_\_ am or pm Location \_\_\_\_\_  
Job \_\_\_\_\_ Activity at Time of Accident \_\_\_\_\_

DESCRIPTION OF ACCIDENT: What happened at the time of the accident?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Witnesses: \_\_\_\_\_

WHAT WAS THE CAUSE OF THE ACCIDENT?

Determine the cause by analyzing all the contributing factors if either a person, machine, or other physical condition was involved. Find out **HOW** and **WHY**.

Use the form to organize information gathered from your observations and interviews.

A. Describe any **UNSAFE** acts:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

B. Describe any **UNSAFE** conditions:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

C. Describe the **FUNDAMENTAL ACCIDENT CAUSE**:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

WHAT CORRECTIVE ACTIONS WILL BE TAKEN?

What have you done or what do you recommend to change or modify to prevent recurrence of a similar accident?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Has it been done? Yes No If Not, Why? (Explain)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



## Objectives of Hazard Identification

- List basic reasons for conducting safety inspections
- Describe what to inspect
- Identify guidelines & considerations for conducting an inspection
- Define Job Safety Analysis
- List the steps in a Job Safety Analysis

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## Safety Inspections? Inspection vs. Audit

Are you AUDITING or INSPECTING?

- Safety Inspections examines physical facilities - looking for unsafe conditions, safe behavior, housekeeping responsibilities....
- Safety Audits examines procedures & policies

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## Safety Inspections WHAT?

- Equipment and Processes
- Employee Work Practices
- Workplace Facility-Wide Hazards



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## Safety Inspections WHY?

- Identify:
    - hazards
    - safe practices,
    - behavior & conditions that are safe and unsafe
  - Get employees involved & trained
  - Improve operations
- Focus on **Fact Finding** NOT Fault Finding



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## Considerations for Safety Inspections

- **Individual conducting the inspection:**
- Experienced with the facility & operation
- Knowledgeable of relevant regulations, codes, & company policies
- Competent of the inspection steps
- Capable of collecting, evaluating, & reporting the data

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## Safety Inspections HOW?

### Guidelines for Conducting Safety Inspections

- Decide what to inspect
  - Gather needed supplies
- Remember your “people skills”
- Record observations
- Handle emergencies

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## Job Safety Analysis

- Definition:

Process used to:

- Review Task Methods
- Identify Hazards
- Develop & Specify Control Measures

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## Job Safety Analysis

### WHY?

- Improve job methods
- Reduce costs
- Improve worker health & safety
- Leads to recommended action or procedure to perform the job safely

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## Job Safety Analysis

### HOW?

Four Basic Steps:

1. Sequencing of Basic Job Steps
2. Identifying Potential Hazards
3. Prioritizing the Hazards
4. Recommending Action(s) or Procedure(s)

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## Learning Activity

Focus on Hazards  
Complete a  
Job Safety Analysis



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### Accident (Incident) Investigation Objectives:

After training, the participants will be able to:

- List the **benefits** of conducting the investigation
- Explain the **purpose** of investigating ALL incidents and near-misses

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### Accident (Incident) Investigation Objectives:

- List the **steps** in conducting an incident investigation
- List the **tools** needed to properly conduct an investigation
- Explain the **responsibility** of the investigator

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## Accident (Incident) Investigation Objectives:

- Describe the proper interview techniques to gather information from the witness(es)



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## Accident (Incident) Investigation Definition:

- Organized process using written procedures that are **applied every time an incident occurs** regardless of its severity.



Who - What - When - Where - How & Why

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## Accident (Incident) Investigation Purpose:

- Determine Direct Causes (root cause)
- Prevent Similar Occurrences
- Document Facts
- Provide Cost Data
- Reinforce Commitment to Safety

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## Accident (Incident) Investigation Procedure:

!!Fact finding NOT fault finding!!

- ✓ Identify causal factors (contributing)
- ✓ Evaluate causal factors & other hazards
- ✓ Select Corrective Actions



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## Accident Investigation

- ✓ Tools
- ✓ Investigator responsibilities?



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## Accident (Incident) Investigation

Steps to follow:

1. Be Prepared
2. Survey the scene
3. Emergency response for the injured
4. Secure the area
5. Gather the evidence – photos, interview
6. Analyze the information- write report

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## Accident (Incident) Investigation

7. Recommend changes
  - implement corrective action
8. Follow up

And remember:

**!!Fact Finding NOT Fault Finding!!**

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There is no absolute in the prevention of workplace accidents and injuries. Even with the most comprehensive safety program in place, accidents and injuries can only, at best, be minimized. So, when injuries or illnesses do occur, management is then responsible to do everything possible to provide prompt medical care and to assist the injured worker in returning to full, productive employment.

## **STEP 1      Formation of Return-to-Work Committee (or Team)**

The first step to beginning a Return-to-Work program for your company is to develop the committee (or team). The committee will not only establish the workplace policy but also guide and monitor the program's administration. The Return-to-Work team will be involved in all aspects of case management. Its collective goal is to direct the injured worker's recovery toward a return to productive employment. Each injury requires personal attention. To be successful, you will need to continually fine-tune your program to meet the ongoing needs of your employees and your company.

Each company's team will vary depending on the size and resources of the company. Each member of the team is either assigned a specific role or provides important information and support during the treatment and rehabilitation of the injured worker.

After an injury occurs, the information gathered during the Return-to-Work process allows for the evaluation of job positions and work sites and the improvement of loss prevention and safety process. The assigned personnel will also be able to identify questionable incidents and unsafe work conditions through aggressive investigation and management.

It is essential, if you work in a union shop, to have union representation on your Committee. One of the greatest benefits afforded to your workplace through establishing a Return-to-Work program is the spirit of collaboration that occurs when employees and representatives from all areas come together with the mutual goal of returning injured workers to the workplace. A Return-to-Work program depends on joint Labor/ Management cooperation.

Additionally, any and all information relative to the employee's medical history and/or condition needs to be kept confidential and should be handled only by your Human Resources committee representative who can serve as a case manager. Ensuring this high level of confidentiality will bolster your employees' confidence in program participation.

### **Management and Worker Representatives**

It is essential to make sure there are representatives from both management and the workforce serving on your Return-to-Work committee.

A firm commitment from top management to the necessity of the program and its benefits are demonstrated best by representation on the committee. Part of management's role on the committee will be to develop a strategy to communicate support and commitment throughout the organization

The worker representative might be a union member or, in non-unionized workplaces, an employee representative. This person(s) serves to provide information about the union requirements of modified duties, monitors and assists in the creation of temporary accommodation positions, and acts responsibly on behalf of the worker in matters of seniority and job assignments. Worker representation will also serve to benefit the entire workplace community by acting as a liaison to the workforce by keeping co-workers and staff informed on the progress of the Committee.

### **Suggested HR and Provider Representatives**

Depending on the size and needs of your organization, you may want to include a representative from your company's HR Department and/or a representative from the medical community on your Return-to-Work Committee.

An HR representative (or a staff safety employee) may serve on the committee to direct the company's case management activities. This member would maintain contact with the health care provider and the worker while maintaining a record-keeping and reporting system. This committee member would require a thorough knowledge of workers' compensation operations, have the ability to allocate resources to modify tasks or work sites, and have the responsibility of coordinating the final arrangements for alternative work assignments and of monitoring of the injured worker's progress. As stated earlier, the HR committee representative will be a member of the Return-to-Work team who should handle confidential medical information.

Additionally, your company may want to include a health care representative. You may already have a provider or occupational health nurse on staff, or the possibility may exist to obtain a volunteer from your company's workers' compensation panel. A direct medical representative would be an immense asset to your team as you prepare to interact with the medical community. This advisor can assist you with suggestions on form format, questions to ask, and follow-up advice. Additionally, if your company does not already have a provider's panel, these representatives can make suggestions on potential practitioners to consider during the development of your panel.

## **STEP 2      Develop a Return-to-Work Policy Statement**

The Return-to-Work policy statement is a joint labor/management directive offering an introduction to the workforce of your company's Return-to-Work program. Your company's policy statement will be a point of reference throughout the entire development and maintenance of your Return-to-Work program as it sets the general scope and guideline for your program.

As the first tool that will be used to inform the workforce of your company's new Return-to-Work policy, a great deal of care should go into its development. Critical to the success of this approach with your workforce are the suggestions and guidance of a diverse Return-to-Work committee. Use your initial committee meetings as a forum opportunity to discuss ideas, concerns, and all the pertinent aspects of your program that need to be addressed in your policy statement.

Develop a Return-to-Work philosophy based on the following principles:

- Involve the work force (management, supervisors, and workers).
- Establish a joint employee/management committee.
- Always treat an injured or ill worker with dignity, consideration, and respect.
- Make a commitment to support the injured worker's medical treatment.
- Focus on a person's capabilities, not their disabilities.
- Make a commitment to endeavor to return injured workers to their original jobs as effectively as possible.
- Mandatory participation by both labor and management.

Please refer to the appendixes listed below containing samples to help guide your committee in the creation of your company's Return-to-Work policy.

*See:    Appendix K - Sample Philosophy of a Return-to-Work Program  
      Appendix L - Key Decision Points in Transitional Employment  
      Appendix M - Return-to-Work Policy Statement Example  
      Appendix N - Return-to-Work Policy Statement Example  
      Appendix O - Return-to-Work Policy Statement Example*

## SAMPLE PHILOSOPHY OF A RETURN-TO-WORK PROGRAM

### EMPLOYEES ARE OUR MOST IMPORTANT ASSETS!

(Name of company) Return-To-Work Program is based on the assumption that there is nothing more important than our employees. When an employee loses time from his or her job, or is unable to return to work, everyone loses.

- The employee loses contact with his/her friends, relationships with coworkers, income, benefits and, most importantly, self-esteem, which is often so closely tied to employment.
- Our company loses a valuable employee.

### OUR PROGRAM

To meet our goal of enabling employees to return to productive employment as rapidly as possible, our company takes the following steps:

- We try to meet with the treating provider at the employee's first medical appointment to discuss the physical demands of the employee's regular job, or the demands of alternative temporary tasks. Every effort is made to enable the employee to return to work either immediately or in the very near future.
- We staff the employee's case internally on a regular basis, contacting you regularly to see if an enhanced release can be obtained or whether alternate tasks or additional hours of duty can be approved safely.
- We meet with you immediately if permanent limitations of any kind are projected to determine if these will, in any way, affect the employee's ability to return to his or her regular job or to determine whether we need to consider permanent modifications or other alternatives.

*Because everyone loses when an employee must be temporarily or permanently off the job, it stands to reason that everyone wins when employees are returned to work as quickly as medically possible and become productive, in even a small way, as soon as possible after injury.*

### YOUR ROLE

To achieve the goals of our Return-To-Work Program, we need you as our partner. We will communicate with you regularly. We will provide you with the best possible information about the physical demands of transitional duties available. We will let you know how the employee is doing on the job. We need timely information and communication from you. We need to know as quickly as possible the physical limitations you will be establishing for a safe return to work. We will utilize those restrictions in our Transitional Employment Plan. We need your comments about our company's Return-to-Work program that we provide to you. If there are permanent restrictions, we need your help to evaluate the employee's ability to return to his/her regular job or to evaluate modifications or alternate employment.

Should you have a question about (name of company) Return-To-Work Program, or concerning one of our employees, please call \_\_\_\_\_ (Name) at \_\_\_\_\_ (Telephone Number).

We look forward to working with you.

Sincerely,

## KEY DECISION POINTS IN TRANSITIONAL EMPLOYMENT

The goal of the Return-To-Work Program is the safe, rapid return of our injured employees to transitional or regular employment. We believe that our employees' needs and the needs of (name of company) are best served when our employees are able to maintain some form of medically appropriate employment from the time they are injured until they are able to return to regular employment.

To achieve our goals, we must work together to ensure frequent communication and regular sharing of information. There are key junctures or decision points in what we call the "Transitional Employment" process when we need special input from you. These decision points are described below:

- 1. Day of Injury:** We aim to meet or contact you within 24 hours of the time one of our employees has a significant injury. In many cases, we hope to accompany our injured employees to the first medical appointment following injury. Our goal at that point will be to provide you with an analysis of your patient's regular job so you can make an informed decision about whether the employee can return to the position safely. Other alternatives may be discussed at the time, including temporary modifications to the employee's regular job if feasible, including reduced hours or changes in duties. If suitable alternate work is available--even if it is only for a couple of hours per day--we will attempt to provide it. Your ability to evaluate these opportunities at the time of the initial medical treatment is essential for successful management of each employee's injury and smooth return to productive employment.
- 2. Points of Medical Improvement:** During Transitional Employment we will evaluate every injured employee's case on a regular basis and considering all information provided regarding the employee's physical abilities. We will evaluate this information in terms of opportunities for return to regular or modified work.
- 3. When Permanent or Long-Term Limitations are Projected:** At some point, an employee will reach a time where you are able to project whether he/she is likely to have permanent or long-term limitations. At that point, even if an employee is not yet medically stable, we will consider the feasibility of permanent or long-term reasonable accommodations.
- 4. Point at Which Maximum Medical Improvement is Reached:** This is the point at which the employee has recovered as fully as possible. At this point, we will consider any permanent or long-term limitations and their impact on the employee's ability to return to his/her regular job.

If necessary, we will consider accommodations, including modification to the regular job or placement in suitable alternative vacant employment. Should the employee be unable to be accommodated, this would also be the point where we would consider such possibilities as vocational rehabilitation.

Your contact person for \_\_\_\_\_ is \_\_\_\_\_  
Agency or Site Location Name, Title, Phone

Please call with any questions or concerns.

## RETURN-TO-WORK POLICY STATEMENT EXAMPLE

### Policy Statement Example

In fulfilling this company's commitment to provide a safe and healthy working environment, a Return-to-Work Program has been established for employees who have sustained an injury/illness.

**(Name of Company)** undertakes to accommodate the injured/ill employee through an early rehabilitation and placement where possible, to the benefit of both parties. This program provides gradual and consistent rehabilitation for employees.

**(Name of Company)** will work toward facilitating the injured/ill employee to an appropriate and timely return to work in the original position where they were employed at the same time of the injury/illness. If the original department is unable to place an employee in a suitable position, the company will try to identify an appropriate position in another department. All attempts to place the employee in another area must be done in cooperation with managers, workers, union representatives, and the employee.

Signature \_\_\_\_\_ Date \_\_\_\_\_

**RETURN-TO-WORK POLICY STATEMENT EXAMPLE**

**(Name of Company)** shall make every reasonable effort to provide suitable employment to any employee unable to perform his or her duties as a result of an injury or illness. This may include a modification to the employee's original position or providing an alternative position, depending on the employee's medical restrictions, providing that this does not create an undue hardship to the company. Only work that is considered to be meaningful and productive shall be considered for use in the Return-to-Work Program. Participants placed on the Return-to-Work plans will be expected to provide feedback in order to improve the program. All employees, regardless of injury or illness, will be considered for placement through the Return-to-Work Program.

**Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**RETURN-TO-WORK POLICY STATEMENT EXAMPLE**

It is the company's policy to make every reasonable effort to provide suitable alternative employment to an employee who is unable to perform his or her normal duties as a consequence of injury or illness.

Each department will attempt to accommodate employees who cannot perform the basic duties of their former positions. Where this is not possible, all departments will cooperate in meeting the company's policy of trying to locate suitable alternative employment.

**Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

### Step 3      **Develop Your Company's Provider Panel**

#### **Provider Panel Defined:**

The PA Workers' Compensation Act gives employers the right to establish a list of designated health care providers. When the list is properly posted, injured workers must seek treatment for the work injury or illness with one of the designated providers for 90 days from the date of the first visit. There are some specifics provided in the rules and regulations found in title 34 of the Pennsylvania Code for these lists.

If a designated list is established, the employer must provide a clearly written notice to an injured employee of the employee's rights and responsibilities. Section 127.755 of 34 Pa. Code provides specific instructions concerning when and how the notice is to be provided to the employee.

Employers may not require treatment with any one specific provider on the list, nor may the employer restrict the employee from switching from one designated provider to another designated provider. The employee is free to choose any provider on the list.

If there is an emergency situation, the employee is not required to obtain emergency treatment from a listed provider. However, once the emergency condition no longer exists, the injured employee shall seek treatment with a listed provider.

If an employer chooses not to establish a list of designated providers, the employee has the right to seek medical treatment from any provider of his or her choice.

Further details on the list of designated providers and its correct use are contained in Subchapter D, 34 Pa. Code Sections 127.751 through 127.755 of the rules and regulations found on page 196 of the Workers' Compensation Act as revised and reprinted in 1999.

#### **Designated List of Health Care Providers**

- the list must contain at least six providers
- three of the six providers must be physicians
- no more than four providers may be coordinated care organizations
- each provider's name, address, telephone number and area of medical specialty must be included on the list
- listed providers must be geographically accessible and their specialties appropriate for the anticipated work-related medical problems of the employees

## Step 4 Conduct Job Task Analysis

Task analysis can be used to assess workstation and job design. In the Return-to-Work process, task analysis serves two functions:

- **Loss prevention:**
  - ✓ Analyze jobs and work stations to minimize or eliminate hazards that may cause injuries or illness;
  - ✓ Identify jobs and tasks that are particularly risky and make their redesign a priority; and
  - ✓ Avoid the accident before it happens.
  
- **Identification of alternate work assignments:**
  - ✓ Managers and workers will review existing job descriptions and perform task analysis on each using the task analysis checklist.

### Task Analysis Checklist

Task analysis allows Return-to-Work team members to:

- ✓ Identify the root cause of unsafe conditions in the workplace;
- ✓ Prioritize workplace hazards so the worst problems can be addressed first;
- ✓ Make hazard prevention a part of new workplace design;
- ✓ Provide information to the health care provider treating the injured worker; and
- ✓ Determine the job modifications required to enable the worker to carry out job activities based on information provided by the health care provider.

### Questions to be Included During a Job Task Analysis

- ✓ What activities are involved?
- ✓ What are the physical functions required?
- ✓ How frequently are they performed?
- ✓ What is the duration?
- ✓ What is a typical daily schedule?
- ✓ What equipment and tools are required?
- ✓ How are tools used?
- ✓ What postures are involved?
- ✓ What skills are required?
- ✓ What weights are lifted?
- ✓ How often are they lifted?

It is important that workers, as the people closest to day-to-day operations, participate in the preparation of task lists on their own jobs, and it is helpful if all members of the Return-to-Work team are familiar with the work environment. If feasible, conduct tests to quantify the force and exertion required to perform the duties of the job.

Additionally, the best time to conduct job analyses in your company is before a workplace injury or illness occurs. When a new employee is hired, or once a job task analysis is drafted for a current employee, have the employee sign off on the job task analysis before the injury occurs. This not only aids in the accuracy and consistency of the document but it also eases the burden of participating in a job analysis on the injured or ill employee during what could otherwise be a very difficult and confusing time.

An important thing to keep in mind is that your Job Task Analyses need to be kept up to date as the positions within your company change. It is very important to constantly review and update your records to ensure that they are accurate should you require them.

*Appendix P - Job Description - Essential Functions*

*Appendix Q - Provider Examination Report*

*Appendix R - Return-to-Work Program Provider Form*

**JOB DESCRIPTION - ESSENTIAL FUNCTIONS**

**Job Title:**

**Essential Functions of the Job:**

**Physical Demand Classification:**

**PHYSICAL REQUIREMENTS**

<b>REQUIREMENTS</b>	<b>% OF TIME</b>	<b>FORCES/ WEIGHT</b>	<b>REPETITIONS</b>	<b>DISTANCE/ HEIGHT</b>	<b>ITEMS</b>	<b>COMMENTS</b>
	Occasional 0-33 Frequent 34-66 Cont. 67-100		Occasional 0-32 Frequent 33-200 Cont. 200			
Standing						
Sitting						
Driving						
Walking						
Lifting						
Carrying						
Pushing						
Pulling						
Squatting/Stooping						
Crawling						
Climbing ▪ Stairs ▪ Ladders						
Reaching ▪ Overhead ▪ Below						
Kneeling						
Bending ▪ Knees ▪ Elbows ▪ Torso/Back						
Hand Function ▪ Close Grasp ▪ Pinch ▪ Fine Manipulation						

**WORK CONDITIONS**

NOISE LEVEL	INSIDE	OUTSIDE	TEMPERATURE CHANGES:
WORKING HAZARDS:			EXPOSURE TO DUST, FUMES, GASES:
TOOLS USED FOR THE JOB:			
ACCOMMODATION AVAILABLE:			

## PROVIDER EXAMINATION REPORT

Name: \_\_\_\_\_ Date of Exam: \_\_\_\_\_

Date of Injury: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Employer: \_\_\_\_\_ Occupation: \_\_\_\_\_

History as Related by Patient:

Are your findings consistent with history and type of injury?	Yes	No	Unsure
Is the injury work related?	Yes	No	Unsure
Are there any current conditions that may affect recovery?	Yes	No	Unsure

Please Explain: \_\_\_\_\_

Diagnosis: \_\_\_\_\_

Treatment Plan: \_\_\_\_\_

Patient Status:  Return to work with restrictions (see below)  
 May return to full duty work  
 Unable to return to work

If unable to return to work full duty, anticipated date of return to full duty: \_\_\_\_\_

**Work Status:** (Circle the level of limitation if applicable)

Lifting:

<input type="checkbox"/> Sedentary	<10 lbs occasionally and up to 5 lbs frequently		
<input type="checkbox"/> Light	10-20 lbs occasionally and up to 10 lbs frequently		
<input type="checkbox"/> Medium	20-50 lbs occasionally and up to 20 lbs frequently		
<input type="checkbox"/> Heavy	50-100 lbs occasionally and up to 50 lbs frequently		
<input type="checkbox"/> Very Heavy	>100 lbs occasionally and up to 100 lbs frequently		

Bending	None	Occasional	Frequent	Constant
Squatting	None	Occasional	Frequent	Constant
Kneeling	None	Occasional	Frequent	Constant
Climbing	No fixed stairs	No Ladders		
Reach	Not with Right	Not with Left		
Grasping	Not with Right	Not with Left		
Pushing/Pulling	Not with Right	Not with Left		
Sit	None	Occasional	Frequent	Constant
Stand	None	Occasional	Frequent	Constant
Walk	None	Occasional	Frequent	Constant
Drive	None	Occasional	Frequent	Constant

Other: \_\_\_\_\_

Next Appointment Date and Time: \_\_\_\_\_

Health Care Provider Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**RETURN-TO-WORK PROGRAM  
PROVIDER FORM**

**To:** Health Care Provider

**Subject:** Employee: \_\_\_\_\_

**From:** Company Name

**SS#:** \_\_\_\_\_

We want to assist our employee and your patient to return to work as soon as possible and assist him/her in performing essential job functions at this institution. The information you provide on this form is vital and will be used for the following considerations:

- Allowing the employee to work without risk of further injury;
- Revision of a temporary assignment if necessary that meets the employee's needs and the needs of this institution.
- Provision of any temporary reasonable accommodations to aid the employee in performing his/her duties.

The employee's job description is attached for your consideration:

\_\_\_\_ Regular Job Description                      \_\_\_\_ Temporary Assignment Job Description

If you have any questions regarding the information requested on this form, please contact:

Name & Title of Hosting Department Supervisor	Telephone Number
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**TO BE COMPLETED BY HEALTH CARE PROVIDER**

Considering this employee's job duties and health condition, this employee may perform work in the following manner:

\_\_\_\_ Full Duty (no restrictions)  
    \_\_\_\_ Regular Job Description                      Beginning: \_\_\_\_\_

\_\_\_\_ Less than Full Duty (some restrictions)                      Beginning: \_\_\_\_\_  
    \_\_\_\_ Temporary Assignment Job Description

Additional Restrictions to Temporary Assignment Job Description should be noted on the Temporary Assignment Job Description.

\_\_\_\_ Off Work until Re-evaluated by Provider Beginning: \_\_\_\_\_  
    Next Office Visit Scheduled: \_\_\_\_\_

\_\_\_\_\_  
Health Care Provider's Signature

\_\_\_\_\_  
Date

## **Step 5      Develop Suitable Alternative Work Assignments**

Completed task analyses are used to identify jobs for returning injured workers. Work activities are designed to accommodate limitations such as restricted lifting, standing, walking, or sitting. Alternate work activity can be a modified version of the injured worker's original job, the same job with reduced hours, or a combination of tasks from other positions. It can be full or part time, but should be a time-limited assignment that is directed toward the injured worker's full return to his or her pre-accident job. The work must be productive and suitable to maintain the worker's sense of worth.

To identify alternate assignments, determine:

- What necessary tasks could the injured worker perform?
- What tasks, now performed occasionally, need to be done more frequently?
- What tasks could be assigned to someone else?

Be certain to know the physical and other demands of the alternate jobs or assignments that your company develops. It is essential that they match the limitations as prescribed by the injured worker's health care provider to ensure prevention of re-injury and the full rehabilitation of the employee.

During recovery, injured workers need their capabilities emphasized rather than their limitations. It is best to consult the employee's treating health care provider on what temporary work assignment would be best suited to the employee's needs and most beneficial to the rehabilitation process.

*See: Appendix S - Examples of Accommodations*

## **THE FOLLOWING LIST WILL HELP YOU IDENTIFY WAYS IN WHICH AN INJURED WORKER MIGHT BE ACCOMMODATED**

### **Temporary Accommodation**

**Light Duties:** Demand less physical exertion than pre-injury job. Worker's duties are limited according to the recommendations of the health care provider.

**Lesser Duties:** The worker performs reduced duties at a slower pace.

**Alternate Duties/Tasks:** Although the worker may be unable to perform regular duties, he or she may be able to perform other duties within his or her limitations. The worker must have the necessary skills and abilities to perform these duties competently and safely. A short-term skill development-training program to upgrade skills may be required.

**Reduced Hours:** The number of work hours may be reduced to match the worker's tolerance level.

**Temporary Accommodation as Treatment:** The employer may be asked by the health care provider to make certain additional modifications to the worker's job to accommodate the treatment process. These modifications include work hardening, extended therapy, and graduated duties.

**Work Hardening:** Work duties may be used as part of a conditioning and strengthening process. The work is designed to progressively increase the worker's physical ability until he or she is able to perform his or her regular duties.

**Extended Therapy Program:** The health care provider designs a treatment program incorporating actual work duties in a work setting. Under supervision, the worker's usual work duties are gradually added. This ensures that the duties are performed correctly and are within the worker's ability.

**Graduated Return-to-Work Program:** Work accommodations are made to allow the worker to return to work as soon as medically able and to gradually resume regular duties as recovery allows.

### **Permanent Accommodation**

If it is determined that the injured worker is unable to return to his or her pre-accident duties, a permanent accommodation may be required. The employer may be asked to participate in identifying an appropriate job change. This may include training on the job and work assessment.

**Training on the Job:** The work site may be used to train an injured worker in a new job. Work is performed under the supervision of a qualified worker and the program is intended as preparation for a specific job. This program is most effective if a job is available with the training employer following the training period.

**Work Assessment:** The worker performs the job under supervision to evaluate if he or she has the ability to perform their job duties. This may be required prior to training on the job or enrolling in academic or technical training programs.

## **Step 6      Develop a Provider Form**

A Provider form needs to be developed so that injured/ill workers can inform the treating provider of your company's Return-to-Work program and so the company can gather relevant information to find a suitable temporary job assignment for the employee.

Crucial in your consideration of provider forms is to first identify the information necessary to your needs. Once you know exactly what that information is, selection of the proper form, style, and content should follow.

Additionally, remember to consult medical community representatives that may be present on your Return-to-Work Committee or provider panel for their advice and counsel. The first-hand knowledge and experiences that these individuals bring to the table will truly ease the provider form creation process.

See:    *Appendix T - Letter to Health Care Provider About Return-to-Work*  
         *Appendix U - Return-to-Work Program Temporary Assignment Job*  
         *Description*

LETTER TO HEALTH CARE PROVIDER ABOUT RETURN-TO-WORK

Dear \_\_\_\_\_:

(Name of Company) is committed to returning injured or ill employees to work within their capabilities. We believe that an employee who returns to work as soon as medically appropriate, and within his or her work restrictions, regains economic security, physical strength and flexibility, and has improved psychological well-being.

I am writing to ask for your opinion concerning Mr./Ms. \_\_\_\_\_'s ability to return to work at this time. Enclosed is an analysis of Mr./Ms. \_\_\_\_\_'s regular job (and/or proposed Transitional Employment Plan). Based on your review of the enclosed Return-to-Work Program (and/or proposed transitional employment plan) and your examination of Mr./Ms. \_\_\_\_\_, please choose one or more of the following:

I release the employee to the job as described in the Return-to-Work Program (or proposed Transitional Employment Plan) effective \_\_\_\_\_.

I release the employee to the activities as described under the following conditions:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I cannot release the employee to any part of the duties described at this time.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

An appointment to review the employee's condition further is scheduled for \_\_\_\_\_.

Provider's Name \_\_\_\_\_ Date \_\_\_\_\_

Please feel free to provide any additional comments you have concerning Mr./Ms. \_\_\_\_\_'s ability to work.

Thank you for your assistance with this matter.

Sincerely,

Enclosure (Your Company name) Return-to-Work Program Details (and/or other attachments)

**RETURN-TO-WORK PROGRAM  
TEMPORARY ASSIGNMENT JOB DESCRIPTION**

**Employee Name:** \_\_\_\_\_ **Hosting Department/Location:** \_\_\_\_\_  
**Position Name:** \_\_\_\_\_ **Effective Date:** \_\_\_\_\_

**Essential Functions:** (*Health Care Provider:* Indicate if the employee can/cannot perform the essential function listed by circling yes or no. *Supervisor:* List essential job functions.)

_____	Yes	No

**Physical Requirements:** (*Supervisor:* Check those that apply to job described above. *Health Care Provider:* Check yes or no)

<u>Requirement:</u>	<u>Yes</u>	<u>No</u>	<u>Requirement:</u>	<u>Yes</u>	<u>No</u>
___ Lifting			___ Walking		
___ Moderate (15-45 lbs)			___ Standing		
___ Light (up to 15 lbs)			___ Sitting		
___ Carrying			___ Crawling		
___ Heavy (45 lbs and up)			___ Twisting		
___ Moderate (15-45 lbs)			___ Pushing		
___ Light (up to 15 lbs)			___ Stooping		
___ Reaching above shoulders			___ Kneeling		
___ Straight pulling			___ Ability to read		
___ Pulling hand over hand			___ Ability to type		
___ Dual simultaneous grasping			___ Ability to write		
___ Operating mechanical equipment			___ Hearing		
Specify _____			___ Speaking		
___ Operating office equipment			___ Climbing stairs		
Specify _____			___ Simple grasp		
___ Operating a motor vehicle			___ Repeated bending		
___ Other: _____					

**Additional Recommendations/Restrictions:** (*Health Care Provider:* List if applicable)

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Health Care Provider Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_  
**Health Care Provider Printed Name:** \_\_\_\_\_  
**Approval of Hosting Department:** \_\_\_\_\_ **Date:** \_\_\_\_\_

## **STEP 7      Communicate Policy to Workforce**

It is strongly suggested that all employees be notified of every new policy in writing. The policy statement should then be signed and dated by the employee and filed into the corresponding personnel file. This is not only a good practice for the Return-to-Work program, but also for every personnel transaction, policy change, or creation. Having all employees sign and date all changes and additions serves to reinforce that all employees are aware of workplace policies, practices, and procedures.

Additionally, if you work in a union environment, you must first remember to confer with the union before posting the new policy. This is another aspect where the importance of having union representation on your Return-to-Work Committee is so pivotal as to how your policy will be received by the workforce.

Once the policy has been formally introduced, it should be posted in a visible area of the workplace. Posting the policy will serve not only as a reminder but also as reinforcement of management's commitment to the program. It will also allow for the policy to be easily and conveniently referenced should the need arise.

## Step 8 Educate The Workforce

The key to the success of a Return-to-Work program is partnership among workers, employers, and health care providers, and a shared commitment to the goal of returning injured workers to employment.

Proper education of your workforce will:

- Make everyone in the workplace aware of the principles and practice of the Return-to-Work program.
- Educate supervisors and workers about the needs of injured co-workers returning to the work environment.
- Make everyone aware of the benefits of a Return-to-Work program. This can be achieved by:
  - ✓ Providing employee orientation to introduce the Return-to-Work program and explaining how the company will respond if a worker is injured;
  - ✓ Providing ongoing education;
  - ✓ Displaying posters of the mission statement or policy;
  - ✓ Putting information about the Return-to-Work program in the employee newsletter;
  - ✓ Providing sensitivity training to help co-workers generally understand the needs of injured co-workers;
  - ✓ Providing support and education to the injured worker's family;
  - ✓ And finally, the Return-to-Work team should educate injured workers on their new tasks or modified jobs, and explain the importance of staying within the provider's guidelines.

See: *Appendix V - Return-to-Work for Stakeholders PowerPoint Presentation*  
*Appendix W - Return-to-Work for Management PowerPoint Presentation*  
*Appendix X - Return-to-Work for Employees PowerPoint Presentation*



# Return-to-Work

Stakeholders

For Pennsylvania  
Business and  
Industry



## What is Return-to-Work?

Return-to-Work is the proactive approach, endorsed by many health care providers, designed to help restore injured workers to their former lifestyle in the safest and most effective manner possible.

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## Return-to-Work Management

The simultaneous coordination of:

- Health Care Services
- Vocational Rehabilitation
- Claims Development

In the most caring and cost effective manner possible.

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## Why Introduce Return-to-Work?

- Workplace injuries, illnesses, and accidents are costly to employers, workers, and the compensation partnership
- R-T-W promotes communication and establishes the role of each participant
- R-T-W programs benefit all partners in the compensation system

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## Costs of Absences

### To Workforce:

- Dealing with replacement workers
- Increased benefit costs
- Loss of potential income

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## Costs of Absences

### To Employer:

- Recovery of production
- Quality and hiring of replacement workers
- Lower morale
- Increased training costs
- Overtime
- Non-productive work time
- Increased premiums
- Other non-recoverable costs

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## Return-to-Work Outcomes

- Reduce financial burdens on employers, workers, and workers' families
- Reduce workers' length of time off work
- Assists unions in protecting employment rights of members
- Allows health care staff to develop more specialized treatment plans
- Provides opportunity for all parties to participate in the Return-to-Work decision

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## Employer Benefits By:

- Reducing staff turnover and training costs
- Retaining experienced and knowledgeable workers
- Minimizing non-recoverable expenses
- Improving accident experience
- Decreasing the number of grievances and arbitrations
- Improving morale and employee relations

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## Worker Benefits by:

- Maintaining the employment relationship
- Maintaining vacation and sick leave
- Maintaining social contact and support from co-workers
- Reducing the amount of time for recovery
- Maintaining financial credibility
- Focusing on their abilities, not disabilities
- Maintaining necessary job skills

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## Union Benefits by:

- Preserving jobs, seniority, and benefits for injured workers
- Promoting cooperative labor/management relations
- Increasing awareness that the union is there to protect workers' interest and well being
- Decreasing the number of grievances and arbitrations

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## Health Care Professionals Benefit by:

- Providing focused and coordinated treatment for the injured/ill worker
- Using the cooperative approach, which allows for more efficient use of health care resources directed towards a specific goal . . .

The return to work of an injured/ill worker!

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## Benefits to All Stakeholders

- Restores employee to workplace as part of his or her recovery program
- R-T-W maximizes treatments
- Injured employee experiences quicker recovery
- Minimizes long-term workers' compensation costs

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## So Begin Plans for Your Return-to-Work Program Today!

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The End

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# Return-to-Work Management

For Pennsylvania  
Business and  
Industry



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## Management Responsibilities

(prior to incident)

- Keep subordinates informed on the development of your company's Return-to-Work program
- Participate with R-T-W Committee on Job Task Analysis
- Answer questions and make referrals on R-T-W inquiries

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## Management Responsibilities

Immediately upon the report of an accident or injury.

- Seek medical attention
- If necessary, get injured or ill worker to the hospital
- Remain calm and in control

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## Management Responsibilities (Continued)

- Notify personnel (and all other necessary departments) of the incident
- Notify workers' compensation carrier
- Conduct accident investigation
- Take necessary actions to prevent recurrence of the incident
- Maintain communication with employee and his or her family

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- Retaining experienced and knowledgeable workers
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## Union Benefits by:

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## Benefits to All Stakeholders

- Restores employees to workplace as part of his or her recovery program
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So Begin Plans  
for Your  
Return-to-Work  
Program  
Today!

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The End

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# Return-to-Work

Employee

For Pennsylvania  
Business and  
Industry



## What is Return-to-Work?

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## Return-to-Work Management

The simultaneous coordination of:

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In the most caring and effective manner possible.

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## Employee Responsibilities

- Notify Employer / Supervisor at time of injury
- Make arrangements for medical care with a Panel Provider, if necessary
- Communicate with Supervisor on your progress and needs

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## Employee Responsibilities (Continued)

- Work with Return-to-Work Committee and your treating health care provider on R-T-W plan
- Participate in Alternative Work Assignment
- Maintain a positive outlook
- Return to pre-injury status
- Schedule and attend regular appointments

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## Worker Benefits by:

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- Maintaining financial credibility
- Focusing on their abilities, not disabilities
- Maintaining necessary job skills

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## Injured Worker's Family Benefits by:

- Continuing income
- Reducing medical expenses
- Reducing impact on family relations

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## Co-Workers Benefit by:

- Improving productivity by keeping skilled and productive workers on the job
- Improving accident experience
- Benefiting from opportunity to have meaningful alternative duties completed that might otherwise not have been completed

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## Union Benefits by:

- Preserving jobs, seniority, benefits for injured workers
- Promoting cooperative labor/management relations
- Increasing awareness that the union is there to protect workers' interest and well being
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## Benefits to All

- Restores employees to workplace as part of his or her recovery program
- R-T-W maximizes treatments
- Injured employees experience quicker recoveries
- Minimizes long-term workers' compensation costs

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## Consequences to Employees

Potential consequences to employees opting not to participate in your company's Return-to-Work Program include:

- Increased medical expenses associated with increased time out of the workplace
- Time away from work
- Inability to keep up with necessary job skills in a competitive market
- Loss of socialization with co-workers

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So Begin Plans To Join Your Company's Return-to-Work Program Today!

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The End

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## **Step 9 Inform Stakeholders of Responsibilities**

The next steps in a Return-to-Work Program take place after an injury has occurred and involve developing and managing an individual Return-to-Work plan.

After an injury occurs, all the partners in the Return-to-Work process are responsible for the Return-to-Work of the injured worker. The breakdown of responsibilities is as follows.

### **Employer**

- Provide immediate support to the injured worker and family;
- Maintain fact finding only – not fault finding – when conducting the accident investigation and documenting circumstances surrounding the injury;
- Review the accident investigation report and address any job related issues;
- Develop a Return-to-Work plan with the injured worker and the health care provider;
- Communicate early with the health care provider and the injured worker about return-to-work opportunities;
- Provide a concise and accurate task list to the health care provider to assess the worker's suitability for a position;
- Maintain communication with the injured worker and the health care provider about the progress of the individual;
- Provide detailed job descriptions and make temporary and permanent accommodations for injured workers; and
- Monitor the injured worker's progress both during treatment and during his or her return to work.

### **Health Care Providers**

- Operate from a team approach and treat all the effects of the injury, recognizing the possible psychological impact of the injury, where related;
- Make an initial diagnosis, identify appropriate treatment strategies and make a realistic prognosis about when the worker will be able to return to work;
- Focus on the injured worker's recovery and advise the worker and the employer when a return to work is medically appropriate;
- Contribute medical knowledge to the Return-to-Work plan;
- Identify other factors that may inhibit the injured worker's return to work. Communicate any potential work place risks that may effect the injured employee's return to work developing and fostering open communication between all partners. Make certain to follow-up with appropriate and prompt intervention ; and
- Tailor each treatment plan so it is medically appropriate.

### **Injured Worker**

- Obtain medical treatment;
- Provide information and influence the design of the individual plan;
- Follow the treatment plan as closely as possible; and
- Keep in regular contact with employer to communicate about progress and needs.

### **Union or Worker Representative**

- Participate with the employer and the injured worker to develop an appropriate work plan. One that is sensitive to the needs of the injured worker; and
- Represent the injured worker in matters of job security, appropriate treatment, and re-employment assignments.

In a global economy Health & Safety and Return-to-Work programs not only help employers to remain competitive, but also help workers to remain employed.

## Return-to-Work Program Samples

A Return-to-Work program may be introduced in large or small organizations. Large companies may be able to devote more resources to the program, but smaller companies can customize many of the features to meet their needs.

### Essential Elements for All Return-to-Work Programs

- Set up a list of clear steps to follow after an injury has occurred;
- Set up lines of communication among health care providers, management, and the union;
- Set up a contact schedule to monitor the progress and needs of the injured worker;
- Evaluate and enhance the Return-to-Work program on a regular basis;
- Present the Return-to-Work program as part of a benefit package;
- Identify some Return-to-Work opportunities before they are needed;
- Be positive and flexible: focus on capabilities rather than disabilities;
- Use videos in job modification, workplace redesign, rehabilitation efforts, and other reasonable accommodation procedures;
- Promote a cooperative environment;
- Maintain contact with all partners;
- Make sure the Return-to-Work tasks are appropriate for the injured worker's capabilities; and
- Have the injured worker assist in identifying suitable work.
- Included in the Return-to-Work model are several sample programs that were generously shared with us by several employers. These are in-place, working programs from companies large and small and in various types of businesses and industries. The programs are included as examples that may provide some ideas that may be appropriate to your company.

See: *Appendix Y – Comprehensive Return-to-Work Model*  
*Appendix Z– Return to Work Model Program*  
*Appendix AA – Return to Work Model Program*  
*Appendix BB – Return to Work Model Program*

## **Return to Work Program**

This program is to minimize the production lost by the company and wages lost by the employee as a result of temporary partial incapacity resulting from on the job injury. It is the express intent to provide modified duty within the employee's restrictions whenever possible and to facilitate the employees full rehabilitation as rapidly as possible.

The Human Resources Director is primarily responsible for administration of this procedure.

- I. Notification of Restriction
  - A. Human Resources will be notified that an employee has been injured.
  - B. Copy of completed Treatment Report will be furnished to Human Resources immediately after treatment; if after office hours, a copy will be left in the Supervisor's office and furnished to Human Resources the next business morning.
  - C. In the event the injured employee cannot return to the facility due to hospitalization or similarly severe prescribed restriction, Human Resources will obtain required information directly from the medical resources.
  - D. The Treatment Report is the primary document to capture the treating physician's restrictions. Additional clarification or modification of restriction may be provided on other documents; however, a Treatment Report will be taken by the employee to all medical appointments (except physical therapy).
  - E. Restrictions addressed by this policy must be identified by a medical doctor or other state licensed practitioner of the healing arts.
- II. Identification of Modified Duty Job Assignment(s)
  - A. In cases where an employee's restrictions preclude performing his pre-injury job (or particular aspect of the job), every reasonable effort will be made to identify or create a productive job assignment which will accommodate temporary restrictions as identified by the treating physician.
    1. This accommodation may include providing intermittent assistance or relief in dealing with one or more elements of the employees "regular" (pre-injury) job.
    2. Accommodation may also include arrangements for less than an eight hour work day (in such cases, hours not worked will be accumulated and submitted to the worker's compensation insurance carrier).
    3. Every effort will be made to place the employee in the most productive assignment available; direct labor categories will be preferred over indirect.
    4. The modified duty job assignment will be made by the Human Resources Director after consultation with production management.
  - B. The modified duty job assignments will be recorded on the Restricted Job Description, to be completed by Human Resources prior to or coincidental with the employee's return to work.
    1. The Description will be acknowledged by the employee, supervisor, union representative and the Human Resources Director. Each will be provided a copy of the completed document.
    2. The Description may be revised or reissued based on change in the employee's restrictions. The Description will expire 90 days after last authorization or when employee is released without restrictions.

3. It is the Supervisor's explicit responsibility not to assign any work to the employee which is contrary to the identified restrictions. The employee has an explicit responsibility not to attempt any task which may exceed his identified restrictions. Any difficulties experienced by the employee within his restrictions will be reported to Human Resources for review with treating physician.
4. Any questions or controversy as to an employee being restricted from performing specific task(s) will be brought to the immediate attention of the Human Resources Director for resolution.
5. The Human Resources Director will notify all parties when the employee has been fully released for unrestricted duty.

C. Wages and Related Considerations

1. The employee will continue to receive his/her pre-injury wage, plus any general increases, for all hours worked in a restricted capacity.
2. The employee will be paid per C.1 for hours less than his/her scheduled shift lost due to company arranged examinations, treatment and therapy.
3. The employee may not bid on any posted job openings while in a restricted capacity.
4. The employee will be shown on the weekly schedule as "restricted."
5. Since he will "follow the work" within restrictions, normal shift scheduling practices may not be possible.

## RESTRICTED DUTY JOB DESCRIPTION

**Position: Modified Duty** \_\_\_\_\_

Supervisor: \_\_\_\_\_

**General Description:** Performs restricted duty assignments within the weight and/or physical limitations prescribed by a provider. Employee must be eligible to receive workers' compensation benefits and must have medical release for restricted duty.

**Responsibilities/Examples of Work:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Special Limitations:** The provider's release attached is made a part of this light duty job description, and is to be strictly followed. Failure to follow any portion of these descriptions will be considered a violation of work rules and may result in disciplinary action. Any questions regarding the appropriateness of a work assignment must be brought to the immediate attention of Human Resources.

**Specific Restrictions:**

1. \_\_\_\_\_ lb. lifting restriction
- 2.
- 3.
- 4.

**Time Limit:** The **Restricted Duty** job description is effective until the employee's next visit to the provider. It may be extended based on the provider's report, however extensions may not exceed ninety (90) days without authorization by Human Resources.

I have read and understand the terms and conditions of the Restricted Duty Job Description. If I have questions I will ask my Supervisor; any differences in interpretation will be brought to the attention of Human Resources.

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

Employee: \_\_\_\_\_  
Supervisor: \_\_\_\_\_  
Union: \_\_\_\_\_  
Human Resources: \_\_\_\_\_

Dr. Appointment: \_\_\_\_\_

With: \_\_\_\_\_

## Return to Work Policy

It is the purpose of this policy to provide guidelines for administering a modified duty program. This program is necessary to limit the amount of lost workdays an injured or ill employee may incur by providing meaningful work of a restricted or limited nature. The program objectives should prevent the unnecessary loss of work time for valuable employees and help maintain continuity of departmental operations to the maximum extent possible.

### Definitions:

#### Restricted Duty

Duties assigned to an injured or industrially ill employee which enable the employee to retain his/her current status with some limited restrictions and with the company being able to make a reasonable accommodation of full duties.

#### Alternate Duty

Duties assigned to an injured or industrially ill employee which require the employee to transfer to another job position or department on a temporary basis.

#### Work Related

Any injury or illness which occurs while performing assigned job duties.

### Responsibilities:

#### Injured Employee

1. Have any or all specific job-related restrictions approved by company designated physicians, as necessary.
2. Report all job-related restrictions to the Safety Director and your immediate Supervisor.
3. Keep both the Safety Director and immediate Supervisor informed of any change in job-related restrictions.
4. Adhere to all medical advice and directives as prescribed by your treating physician, nurse, or other medically qualified professional.
5. Question any medical directives which you may not understand.
6. Do NOT perform any activity which is not in accord with your job-related restrictions, both on and off the job.
7. Employees must be re-evaluated by a company designated physician within 30 days of their last examination to determine whether their modified duty status should be continued.

NOTE: Failure to adhere to any work-related restrictions may result in disciplinary action.

#### Supervisors

1. Insure all employees with job-related restrictions are adhering to their restrictions as noted on the modified duty form.
2. Assign employees with job-related restrictions to jobs which can accommodate their restrictions. If no jobs are available within your department, contact the Human Resources Department and/or the Safety Director to discuss options or arrange for departmental transfer.
3. Compile and maintain a list of departmental job duties that meet light duty requirements. List to be given to Human Resource/Safety Department.

#### Human Resources/ Safety Department

1. Arrange for temporary work assignment of modified duty employees where no work is available within the employee's regular department.
2. Contact all Company designated physicians and inform them of our modified duty policy. Provide periodic updates and any change of status relating to the modified duty program.
3. Schedule all employees re-evaluations as noted in the "Injured Employees Responsibilities" number seven.

## Guidelines

1. Restricted duty employees will be compensated at their designated base rate for a period not to exceed 4 weeks for work-related injuries. For non-work related injuries, the employee will be compensated at the rate of pay, by contract, for the job he/she is performing. After 4 weeks, the Human Resources/Safety Department will determine the rate of pay for the job being performed. At no time will the rate of pay be less than labor rate per contract.
2. Alternate duty employees, with a work related injury, will be compensated at their designated base rate for a period not to exceed 4 weeks. For non-work related injury, the employee will be compensated at labor rate per contract. After 4 weeks, the Human Resources/ Safety Department will determine the rate of pay for the job being performed. At no time will the rate of pay be less than labor rate per contract.
3. Job availability for work related injuries will take precedence over non-work related injuries.
4. The company shall make every effort to bring people back to work as long as this person can not cause any harm to themselves, others, or company property.
5. A non-work related injured employee may continue on a modified duty job for a period 4 weeks. After this time, they may be placed on or returned to sick leave at the company's discretion.
6. Whether an employee should be continued on modified duty due to a work related injury or illness shall be at the discretion of the company.
7. NO alternate duty employee will be permitted to work overtime.
8. People on modified duty may be assigned to work on any shift at the discretion of the company.
9. Any person who is unable to report for work due to an injury or industrial illness must check in with the company at least once per week. This person shall contact the Human Resources/Safety Department to verify there has or has not been a change in their status as to coming back to work.  
  
Non Work related injury/illness - Human Resources  
Work related injury/illness - Safety Director
10. The company maintains the right to assign employees on modified duty to any job, within the plant, that will not exceed their restrictions and they are capable of doing.

## **Return to Work Policy**

ABC company has implemented a Return to Work Modified Duty Work Program for employees injured at work. The purpose of this program is to return an injured employee to work as soon as possible following an injury. This keeps the employee in their normal routine of working and allows the employee to be productive in some manner. Ideally an injured employee can gradually progress back to their full time position.

Modified duty job tasks are determined by the restrictions placed on an employee by their physician. To avoid re-injury only those tasks within the limitations must be performed by the injured employee.

Panel physicians are made aware of our programs and are encouraged to cooperate with ABC Company, for a smooth and safe return to work. Non-panel physicians treating employees with work related injuries shall be notified by mail to define our Return to Work Modified Duty Policy.

Upon returning to work a conference should be held with the Safety Manager, the employee's immediate supervisor, and the injured employee. The purpose of this conference is to ensure all parties involved are aware and understand the modified duties to be performed. A "Modified Duty Job Description" form shall be signed by all attending the conference and posted as a result. Also a daily "Modified Duty Sign-off" form will be provided to the employee. The injured employee shall be asked to sign the form following their daily shift in order to ensure ABC Company has provided a modified duty job and the employee has followed his/her physician's restrictions.

## Modified Duty Job Description

Position: Modified Duty \_\_\_\_\_  
Location: \_\_\_\_\_  
Supervisor: \_\_\_\_\_

### General Description

Perform modified duty assignments within the weight and/or physical limitations prescribed by a physician, for a limited period of time. Employee must be eligible to receive Workers Compensation and must have a medical release for light duty work.

### Responsibility/Examples of Work

### Special Limitations

The Physician's Return to Work Evaluation, attached, is made a part of this light duty job description and is to be strictly followed. Failure to follow any portion of this light duty job description will be considered a violation of work rules and may result in disciplinary action.

### Special Restrictions

1. \_\_\_\_\_lb. Lifting restriction
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

### Time Limit

This Modified Duty job description is effective until the employee's next visit to the physician. It may be extended based on the physician's report, however, extensions may not exceed ninety (90) days without authorization by \_\_\_\_\_. Upon expiration of the time limit, the employee must have a medical release before returning to regular duties.

I have read and understand the terms and conditions of this Light Duty Job Description. If I have questions I will ask my Supervisor.

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

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

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

### Light Duty Approved Until Next Doctor's Examination:

Next Dr. Appointment: \_\_\_\_\_ With: \_\_\_\_\_

Next Dr. Appointment: \_\_\_\_\_ With: \_\_\_\_\_

Next Dr. Appointment: \_\_\_\_\_ With: \_\_\_\_\_

### Modified Duty Sign Off Sheet

My signature acknowledges that all restrictions concerning the modified duty job I have been working have been adhered to by myself and ABC Company.



## **Return to Work Program**

**Purpose:** To provide temporary, modified-duty for members who are partially disabled due to work-related injuries. Every effort will be made to assist the member to return to his/her former position. We will cooperate with the member, the physician, the therapist and any rehabilitation personnel involved in the case.

Scope: XYZ Company will provide **temporary transitional duty** whenever possible for a period of 120 calendar days to determine the degree of improvement. An extension in excess of 120 days may be allowed on a case-by-case basis, when recovery is incomplete. Such extensions will be reviewed every 30 calendar days thereafter and modified work may continue to be provided in cases where improvement continues.

If a member does not demonstrate progress in their recovery through the modified duty program, the program will be reevaluated utilizing the team approach and possibly discontinued as with any other ineffective medical treatment.

Program Coordinator. The Health/Safety Manager will coordinate the return-to-work modified duties with the injured worker, the supervisor and other team members.

### **OBJECTIVES**

1. To allow the member to remain in the work force and resume productive employment as soon as possible in his/her normal classification.
2. To enable the worker to gradually overcome his/her limitations through a transitional period of modified-duty, work reconditioning assignments.

### **TYPE OF WORK**

1. All departments at XYZ Company will cooperate in every way possible to provide regular duties on a limited basis, modified duty and/or special assignments for the disabled member. Whenever possible, attempts will be made to allow the member to remain in his/her classification with modified duties.
2. Some of the following special assignments and/or modified duties in addition to regular duties might include:
  - Rework (sort rejected parts)
  - Clerical work
  - Visitor escort
  - Label and file samples
  - Errands in company vehicle
  - Light janitorial duties
  - Engage in physical reconditioning program
  - Inventory recorder
  - Log and maintain quality records
  - Painting tools
  - Library filing
  - Operate photocopy machine
3. The XYZ Company Occupational Health Nurse will supervise all members undergoing rehabilitation and/or modified duty. When these members are assigned to their regular departments, they will report to the supervisor in that department under the direction of the Occupational Health Nurse. Members undergoing rehabilitation who are not working in their regular departments will be given assignments by the Occupational Nurse.
4. On evening, night shifts and weekends, modification of job duties may be made at any time by the supervisor of a member who has reported an injury, until the member sees the Occupational Health Nurse or sees a practitioner on the Workers Compensation panel of providers.

### **SUPERVISION**

Unless on a specific errand, members undergoing rehabilitation will have the same obligation to remain at their designated work station as any other member.

#### DOCTOR'S APPOINTMENTS

1. The XYZ Company notification policy regarding doctor's appointments will also apply to members undergoing rehabilitation. If the member requires follow-up treatment or a doctor's appointment which cannot be scheduled during his/her non-working time, the Company shall compensate the member for any straight-time lost from work due to said treatment or appointment; provided that the member must have given the Company prompt prior notice that such treatment or appointment could not be scheduled during non-working time, in which case the Company shall have the right to attempt to change the member's treatment or appointment to non-working time and, if able to do so, the member shall not be entitled to compensation if the employee chooses nevertheless to keep the treatment or appointment on working time.
2. The provisions of the agreement between I.U.E. Local 631 and XYZ Company apply to all modified duty and/or rehabilitation assignments.

# Suggestions for Effective Communication with the Medical Community

## Communication is Crucial

Your ability to communicate effectively with your medical community is crucial to the success of the Return-To-Work Program. For your program to be successful, the following goals must be achieved:

- **Immediate Return of Injured Employees to Transitional or Regular Employment:** Nationally, millions of dollars each year are wasted by employers paying time lost to employees who could actually go back to transitional or even regular duty within 24 hours of injury. This money could be saved if, at the time of injury, the medical provider was given a detailed description of the injured employee's job, or alternate tasks the employee could perform while recovering.
- **Rapid Progression from Transitional to Regular or Other Permanent Employment:** Time-lost and related expenses can be dramatically reduced when frequent, ongoing provider contact moves injured employees as quickly as possible through transitional employment to regular or permanently modified employment.
- **Efficient Determination of Reasonable Accommodation Alternatives:** If an employee will not be able to return to regular employment due to permanent or long-lasting limitations, significant dollars can be saved by quickly evaluating and (when appropriate) implementing permanent job accommodations, including internal transfers when feasible.

## The Key to Working With The Medical Community

To achieve good communication with providers and to ensure the rapid return to work of your employees, you need to provide providers with good information about your Transitional Employment work assignments.

### How Can You Get Your Medical Community To Cooperate With Your Return-To-Work Program?

The success of your Return-To-Work Program can only be ensured when your medical community:

- **Understands** your commitment to facilitating rapid return of injured employees to transitional and/or permanent employment;
- **Understands** that your commitment is to your employees, not just to dollar savings;  
**Understands** exactly how each step of your plan works; and
- **Anticipates** your active participation in the recovery and return to work of each of your injured employees.

The Key Elements To Provider Cooperation Are:

1. **Education** of the medical community; and
2. **Frequent contact** with its members.

See: *Appendix CC: Steps for Obtaining Cooperation From The Employee's Medical Provider*  
*Appendix DD: Troubleshooting Guide*

## STEPS FOR OBTAINING COOPERATION FROM THE EMPLOYEE'S MEDICAL PROVIDER

### STEP 1      **Create and prioritize a list of all key providers in your medical community:**

- List all providers who have treated your employees over the past 3 to 5 years.
- Prioritize this list according to the total number of employees treated by each provider during this time.
- Utilize your Workers' Compensation Provider Panel.

### STEP 2      **Develop and Implement an Education Strategy for Each Key Health Care Provider:**

At this point you should, if possible, devise a specific strategy to develop a relationship with and educate each health care provider. You may use the same strategy for all practitioners or you may develop different strategies for each key health care provider. Consider the following:

- **Face-To-Face Meetings:** Schedule individual face-to-face meetings with practitioners to (a) develop relationships, (b) dispel any previous negative impressions, and (c) discuss and/or drop off materials summarizing your company's Return-To-Work Program.
- **Professional Meetings:** Address Professional Association meetings that key practitioners may attend. Use the same basic strategy for individual meetings. Explain the *mechanics* of your Return-To-Work Program. Remember, it is most important to clearly communicate the *philosophy* of the program.
- **Personal Correspondence:** If you cannot arrange to meet practitioners, try a personal letter (not a form letter). The letter should communicate your interest in meeting with the practitioner personally. As an attachment, be sure to provide a brief description of your company's Return-To-Work Program, or at least a statement of philosophy. Ensure that the practitioner knows that your company's Return-To-Work Program is not "business as usual."
- **Follow-Up Calls and Thank-You Letters:** Part of your education strategy could include a brief phone call preceding important letters sent to a practitioner. This phone call builds rapport, and may provide the necessary context for an important letter requiring the provider's response. Practitioners also generally appreciate a brief call or a thank-you note at the conclusion of a difficult case.

### STEP 3      **Develop Sample Documents Explaining Your Company's Return-To-Work Program:**

There are numerous occasions when a concise and professional description of the Return-To-Work Program will be of value. Rather than developing an intimidating all-inclusive document, it would be preferable to create a series of freestanding one-page documents, each briefly describing a key concept.

### STEP 4      **Develop Sample Letters for Communicating with Doctors:**

Unfortunately, many letters written to medical practitioners ask the wrong questions.

## TROUBLESHOOTING GUIDE

There will be times when you have difficulty dealing with specific members of your local medical community. What follows are some common problems and some approaches to dealing with those providers.

### 1. **The provider refuses to talk with your Company about an injured employee's ability to perform regular or transitional employment. What do you do now?**

It is difficult to understand why some providers will refuse to discuss releases to regular or transitional employment. It may be that the provider is harboring some anger about a past conflict, or perhaps simply misunderstands your intention. There is a basic process to go through when dealing with providers who seem uncooperative. The general process is as follows:

- Call the provider directly and talk with him or her about your concerns and about what your goals are for injured/ill employees.
- If you cannot reach the provider directly, contact the provider's nurse, case manager, or assistant to arrange either a telephone conference or a meeting with the doctor to discuss a case.
- If you are still unsuccessful, contact the Clinic Administrator or someone else who is connected with your *Posted Panel of Providers* and arrange a telephone conference or direct meeting with provider.
- While awaiting a response, you may also want to send information to the provider about your company's Return-To-Work Program.
- Enlist the assistance of your dedicated Claims' Specialist.

### 2. **The provider refuses to release your employee to any kind of work until he or she has fully recovered from the injury. What do you do now?**

There may be any number of reasons for a provider to react this way, including a fear of employee re-injury or perhaps a long-term paternal relationship with the employee. Whatever the reason, the proper response is to follow the steps described above under No. 1, and to call or meet with the provider directly. The goal is to be sure that the provider knows you mean the worker no harm and view gradual return to work as therapeutic.

### 3. **The provider appears to ask the injured employee what he or she can do physically, rather than making an independent decision about physical capacities. What do you do now?**

Frequently, providers are at a loss to determine what an employee actually can do physically. Sometimes they have no idea what the employee's job involves, or the providers may simply feel they have no way to objectively measure a worker's physical capabilities. One potential solution:

- Contact the provider personally and arrange an in-person meeting if possible.
- When contact is achieved with the provider, make every attempt to understand the provider's perspective. Your Claims Specialist may be able to suggest where an Independent Medical Examination can be obtained or where an employee may be sent for a Functional Capacities Evaluation. In many cases, this will address the provider's concerns, while providing you with the needed information to proceed.

### 4. **The provider believes your Company is not working in the injured employee's best interest. What do you do now?**

There are many situations that can result in a provider being skeptical about the intentions of an employer. For example, a provider may be suspicious of an employer's actions if his or her previous experience was negative. Frequently, a provider has had no direct contact with an employer for many years. The proper response is to follow the basic contact process described in No. 1, and then sit down with the provider and discuss at some length the intentions of your company relative to the injured employee. It is very important that you meet face-to-face so that the provider has a real person to visualize when he or she is thinking about you as an employer.

**5. The health care provider seems to be providing unreasonable or unnecessary treatment for a work injury or illness. What do you do now?**

The reasonableness or necessity of all treatment provided by a health care provider under the Pennsylvania Workers' Compensation Act may be subject to prospective, concurrent, or retrospective utilization review at the request of an employee, employer, or workers' compensation insurer. A utilization review request may be filed on a form that can be obtained from the Pennsylvania Department of Labor and Industry, Bureau of Workers' Compensation. Remember, the utilization review process is only available for treatment provided under the Pennsylvania Workers' Compensation Act.

## FREQUENTLY ASKED QUESTIONS

### 1. What are the financial benefits to an employee for early return to work after an injury?

For many injured workers, workers' compensation benefits alone are insufficient to replace lost wages. Returning to work in sustained employment, therefore, is probably the best way for injured workers to avoid significant financial losses. In addition, scientific evidence shows that returning to medically suitable modified-duty work aids healing and recovery. Many obstacles, however, hinder successful and sustained returning to work, including communication problems and financial disincentives of important stakeholders in the workers' compensation system.

### 2. What strategies are suggested for ensuring the high quality of modified-duty jobs?

To ensure that jobs for injured workers are rewarding and fulfilling, the following recommendations are suggested:

- Increase information and resources for employers and employees about these positions and how to design them.
- Include the injured worker in the negotiations.
- Develop written job descriptions that include worker input.
- Allow enough time for discussion, interaction, and negotiation.
- Develop methods for following up on individual plans and avenues of recourse if a plan is not followed.
- Create a position for a "worker advocate" (possibly a nurse or nurse practitioner), who would have early involvement in the case.

### 3. What efforts are recommended for employers to assist injured workers to return to sustained employment?

Efforts to help injured workers return to sustained employment include the following steps:

- Injured worker's signs and symptoms: The injured worker describes his or her experience with the injury, including subjective symptoms such as pain, and sometimes shows objective signs of injury.
- Treating provider's diagnosis, treatment plan, and work restrictions: The treating provider interviews and examines the injured worker, makes a diagnosis, determines necessary treatment, and specifies work restrictions.
- Employer's efforts to correct hazards and accommodate injured workers: The employer encourages reporting of injuries, corrects safety problems, and provides accommodations to allow the injured worker to work safely while recovering and to work with accommodations permanently if necessary.
- Claims administrator paying for necessary health care services: The claims administrator promptly authorizes and pays for necessary health and medical evaluation services.

### 4. There are many parties involved in what is often a complex workers' compensation system. How can we better sort out the responsibilities of these various parties, eliminating some of the confusion and/or distrust that seem to exist?

There are many perceptions, viewpoints, beliefs and disagreements that often contribute to some level of confusion and/or misinformation in the workers' compensation system. A proven way to help dispel misunderstandings and to clarify roles and responsibilities is to develop and disseminate informational materials that define procedures, roles and expectations of the various persons involved. Parties most frequently involved in the workers' compensation system include:

Claims Administrators	Third-Party Administrators
Self-Insured Employers	Self-Administered Employers
Treating Physicians	Panel/non-panel Health Care Providers
Qualified Medical Evaluators	Rehabilitation Counselors
Case Managers	Injured Workers

Developing and distributing communications which describe the roles of these and other parties, and, where appropriate the contact information, can greatly help employees and injured workers understand what a particular individual or group's duties and responsibilities are.

For a Return-to-Work program to be successful, it is important that, prior to being injured, an employee know the process that will be initiated, the roles of those within the process, and his or her responsibilities within the process. This structured and planned process allows the injured worker to concentrate on his/her rehabilitation.

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