



# THE COMPLETE RESOURCE GUIDE TO OCCUPATIONAL HEALTH PROGRAM MANAGEMENT - V3.0

PREPARED BY  
DONNA LEE GARDNER,  
SENIOR CONSULTANT FOR  
NAOHP/RYAN ASSOCIATES  
OCCUPATIONAL HEALTH SERVICES

 **NAOHP**  
NATIONAL ASSOCIATION OF  
OCCUPATIONAL HEALTH PROFESSIONALS

# THE COMPLETE RESOURCE GUIDE TO OCCUPATIONAL HEALTH PROGRAM MANAGEMENT - V3.0

## TABLE OF CONTENTS

### 1. INTRODUCTION TO OCCUPATIONAL HEALTH

- 1.0 About Section 1 Occupational Medicine Defined
- 1.1 Embracing the Occupational Health Opportunity
- 1.2 Blended Clinic with Urgent Care and Occupational Medicine Defined
- 1.3 History, Injury Statistics and Costs
- 1.4 Understanding the Market

### 2. ADMINISTRATION AND ORGANIZATION

- 2.1 NAOHP Program Standards
- 2.2 Development of Organizational Chart
- 2.3 Statement of Philosophy
- 2.4 Vision and Mission Statements

### 3. PRODUCT LINES

- 3.0 About Section 3—Product Lines
- 3.1 Summary of Program Components
- 3.2 Total Health Model Flow-Chart
- 3.3 Occupational Rehabilitation Overview
- 3.4 Corporate Wellness
  - 3.4.1 Corporate Wellness Service Line Overview
  - 3.4.2 Corporate Wellness Service Line
  - 3.4.3 Sample Corporate Wellness Program
  - 3.4.4 Employee Wellness Program
  - 3.4.5 Health and Wellness Program Sample Policies
    - a. Blood Pressure Screening
    - b. Cardiac Prevention Programs
    - c. Cardiac Risk Profile Screening
    - d. Fitness Programs
    - e. Wellness Education and Screening
- 3.5 Drug Free Workplace Program
  - 3.5.1 Drug Free Workplace Program Overview
  - 3.5.2 Guidelines for a Drug Free Workforce
  - 3.5.3 Medical Review Officer Role
  - 3.5.4 Drug Testing Program Sample Policies
    - a. Basic Urine Drug Screens
    - b. Breath Alcohol Testing
    - c. Drug Screening Profile Chain of Custody
    - d. Drug Screening Profile Specimen Collection
    - e. For Cause Urine Drug Testing Blood Ethanol Level
    - f. NIDA Urine Drug Screens
- 3.6 Health Exams and Screenings
  - 3.6.1 Health Surveillance Service Line Overview

- 3.6.2 Complying with the ADA
- 3.6.3 Physical Examinations Sample Policies
  - a. Pre-Placement Physical Exams
  - b. Release of Information Form
  - c. Occupational Hearing Conservation Program
    - c.1 Audiometric Testing Program OSHA Standard
    - c.2 Occupational Hearing Conservation Sample Policy
    - c.3 Occupational Hearing Conservation Summary Form
    - c.4 Occupational Hearing Conservation Program
    - c.5 Standard for the Management of Audiology
  - d. Respiratory Screenings
    - d.1 Respiratory Screening Overview
    - d.2 Pulmonary Function Screening
    - d.3 Pulmonary Function Testing Follow-Up
    - d.4 Pulmonary Function Testing Pre-Employment
    - d.5 Recommended Preventive Exams
    - d.6 Respiratory Surveillance Data Sheet
- 3.7 Injury Management
  - 3.7.1 Injury Management Overview
  - 3.7.2 Occupational Health Case Tracking
  - 3.7.3 Loss Management Contract Components
  - 3.7.4 Case Management Model
  - 3.7.5 Impairment Information
  - 3.7.6 Return to Work Urgent Care Form
  - 3.7.7 Safety Handbook
  - 3.7.8 Safety Programs Sample Policies
    - a. Administrative Policy: Clinical Reports
    - b. Administrative Policy: Disability Reports
    - c. Administrative Policy: Discharge Instructions
    - d. Administrative Policy: Physicians First Report of Injury
    - e. Administrative Policy: Workers' Compensation Injury Treatment
    - f. Guidelines for Initial Visit and First Report of Injury
    - g. Physician Report of Workers' Compensation
    - h. Safety Handbook
    - i. Safety Programs
    - j. Accident Reporting & Investigation Plan
- 3.8 On-site Services
  - 3.8.1 Developing a Comprehensive On-site Services Program
  - 3.8.2 Onsite Services Sample - RFP

#### **4. STAFFING PLANS AND EFFICIENCIES**

- 4.00 About Section 4—Staffing Plans and Efficiencies
- 4.01 Clinical Experience Checklist for New Employees
- 4.02 Department Staffing Patterns
- 4.03 Documentation of In-Service
- 4.04 License Verification Worksheet
- 4.05 New Staff Member Orientation
- 4.06 Performance Standards Sample
- 4.07 Standards for the Medical Director's Role
- 4.08 Productivity Analysis
- 4.09 Medical Director Productivity
- 4.10 Protocol Development
- 4.11 Scheduling Plan
- 4.12 Staff Development Program
- 4.13 Sample Medical Director Contract

#### 4.14 Staff Competency Charts

- 4.14.01 Competencies Requirements
- 4.14.02 Competency Age Specific
- 4.14.03 Competency Audiogram
- 4.14.04 Competency Billing Accuracy
- 4.14.05 Competency Billing Denials
- 4.14.06 Competency BP Dinamap
- 4.14.07 Competency BP Manual
- 4.14.08 Competency Breath Alcohol
- 4.14.09 Competency Chart Assembly
- 4.14.10 Competency Chart Hold
- 4.14.11 Competency Drug Screens Collecting
- 4.14.12 Competency Drug Screens Results
- 4.14.13 Competency Drug Screens Shipping
- 4.14.14 Competency Filing Dictation
- 4.14.15 Competency Foreign Body in Eye
- 4.14.16 Competency Glucometer
- 4.14.17 Competency Hand Washing
- 4.14.18 Competency Injections
- 4.14.19 Competency Instruction Sterilization
- 4.14.20 Competency Lacerations
- 4.14.21 Competency Medications
- 4.14.22 Competency Morgan Lens
- 4.14.23 Competency of Clinical Staff
- 4.14.24 Competency Phlebotomy
- 4.14.25 Competency Random Draws
- 4.14.26 Competency Resting EKG
- 4.14.27 Competency Spirometry
- 4.14.28 Competency Telephone Usage
- 4.14.29 Competency UA Dip
- 4.14.30 Competency Vision Testing
- 4.14.31 Competency Vital Signs
- 4.14.32 Competency X-rays
- 4.14.33 Position Specific Competencies - Staff Physician - Medical Director
- 4.14.34 Provider Competencies

#### 4.15 Staff Responsibilities by Job Title

- 4.15.01 Care Manager/Injury Coordinator Responsibilities
- 4.15.02 Care Manager Responsibilities
- 4.15.03 Director of Sales and Marketing Responsibilities
- 4.15.04 Director Responsibilities
- 4.15.05 Discharge Manager Responsibilities
- 4.15.06 Essential Tasks for the Occupational Health Receptionist
- 4.15.07 Essential Tasks for the Licensed Clinical Support
- 4.15.08 LPN Clinician Responsibilities
- 4.15.09 Medical Director Responsibilities
- 4.15.10 Multi-Modality Technician Responsibilities
- 4.15.11 NP or PA Responsibilities
- 4.15.12 Nurse Clinician Responsibilities

### **5. INTERNAL EMPLOYEE HEALTH**

- 5.0 Internal Employee Health & Loss Management System

### **6. ATTAINING OPTIMAL CLINIC FLOW**

- 6.00 About Section 6—Attaining Optimal Clinic Flow
- 6.01 Clinic Configuration
- 6.02 Data Information Structure for Clinic Operations

- 6.03 Department of Transportation Physical Exam Flow
- 6.04 Drug Screen Flow Charts
- 6.05 Employer Services Flow Chart
- 6.06 Injury Management Flow Chart
- 6.07 Follow-Up Visit Flow Charts
- 6.08 Hazmat, Interim, Periodic Flow Charts
- 6.09 Initial Injury Flow Charts
- 6.10 Sample Policy-Chart Format
- 6.11 Sample Policy-Patient Scheduling
- 6.12 Software Checklist
- 6.13 Authorization Form
- 6.14 Case Tracking Log
- 6.15 Documentation and Coding Criteria Template
- 6.16 Employer Results Reporting
- 6.17 Medical Services Authorization
- 6.18 Release of Information Form

## **7. STANDARDS OF CARE**

- 7.00 About Section 7—Standards of Care
- 7.01 Accountability of Care
- 7.02 Standard for Documentation
- 7.03 Diagnosis Codes
- 7.04 Documentation and Coding Procedures
- 7.05 Functional Recovery and Return-to-Work
- 7.06 Standard for Post-Offer Employment Evaluations
- 7.07 Standard for the Management of Abrasions and Avulsions
- 7.08 Standard for the Management of Abscesses
- 7.09 Chart Audit Review—Ankle Injuries
- 7.10 Standard for the Management of Ankle Injuries
- 7.11 Standard for the Management of Anxiety Disorders
- 7.12 Chart Audit Review—Back Injuries
- 7.1-13 Standard for the Management of Back Injuries
- 7.14 Documentation Form for Low Back
- 7.15 Standard for the Management of Human and Animal Bites
- 7.16 Bloodborne Pathogens—CDC Recommendation for Healthcare Workers (PDF)
- 7.17 Standard for the Management of Thermal Burns
- 7.18 Standard for the Management of Cervical Spine Strain
- 7.19 Standard for the Management of Carpal Tunnel Syndrome
- 7.20 Standard for the Management of Cellulitis
- 7.21 Standard for the Management of Orbital Cellulitis
- 7.22 Standard for the Management of Chest Pain
- 7.23 Standard for the Management of Crushing Injury Syndrome
- 7.24 Standard for the Management of De Quervain's Disease
- 7.25 Standard for the Management of Diabetes Mellitus
- 7.26 Standard for the Management of Dizziness
- 7.27 Standard for the Management of Otitis Externa
- 7.28 Standard for the Management of Foreign Body within the Ear Canal
- 7.29 Standard for the Management of Foreign Body in the Eye
- 7.30 Standard for the Management of Corneal Abrasions
- 7.31 Standard for the Management of Corneal or Scleral Lacerations
- 7.32 Standard for the Management of Corneal Ulcer
- 7.33 Standard for the Management of Eye Burns
- 7.34 Standard for the Management of Blow Out Orbital Fractures
- 7.35 Documentation Form for Eye
- 7.36 Standard for the Management of Foreign Body (Non-ophthalmologic)



- 7.37 Standard for the Management of Plantar Fasciitis
- 7.38 Chart Audit Review—Hand or Finger Open Wound
- 7.39 Standard for the Management of Flexor Tenosynovitis of the Hand
- 7.40 Instructions to Patients Concerning Head Injuries
- 7.41 Standard for the Management of Head Injuries
- 7.42 Standard for the Management of Hypertension
- 7.43 Standard for the Management of Hyphema
- 7.44 Infection Control Guidelines (PDF)
- 7.45 Standard for the Management of Anterior Knee Pain
- 7.46 Standard for the Management of Lacerations
- 7.47 Needlestick and Other Sharps-Related Injuries
- 7.48 Standard for the Management of Epitaxis
- 7.49 Standard for the Management of Acute Shoulder Injuries
- 7.50 Standard for the Management of Shoulder Dislocation
- 7.51 Standard for the Management of Rotator Cuff Tears
- 7.52 Standard for the Management of Subacromial Bursitis Tendinitis
- 7.53 Standard for the Management of Adhesive Capsulitis
- 7.54 Standard for the Management of Acromioclavicular Separations
- 7.55 Documentation Form for Shoulder
- 7.56 Standard for Audiology Screening
- 7.57 Productivity Volumes (Excel)

## **8. FORMS AND DIAGNOSTIC HEALTH QUESTIONNAIRES**

- 8.00 Employer Auth to Examine Form
- 8.01 ACOEM Guidelines for documentation for Work Injury
- 8.02 AF questions for health intake
- 8.03 Ankle foot symptoms ACOEM
- 8.04 AUTHORIZATIONFORM
- 8.05 Back questions
- 8.06 Case tracking form
- 8.07 Copenhagen neck functional disability scale
- 8.08 Criteria for FCE
- 8.09 Discharge instructions
- 8.10 DISCLOSURES FOR WORKERS compensation for HIPAA
- 8.11 Drug screen results cover letter field open
- 8.12 Elbow symptoms ACOEM
- 8.13 Employer results ppe an resp reporting
- 8.14 Employer results reporting and resp clearance
- 8.15 Employer results reporting.
- 8.16 Employer results reporting
- 8.17 Exam Forms Physical
- 8.18 FAB Questionnaire
- 8.19 Forearm wrist hand symptoms ACOEM
- 8.20 Form 36 health questions
- 8.21 History and System Review form
- 8.22 Initial Injury visit form
- 8.23 Knee symptom ACOEM
- 8.24 Low back ACOEM
- 8.25 McGill pain words
- 8.26 Medical Restrictions
- 8.27 Medical Services Agreement template.
- 8.28 Medical Services Authorization
- 8.29 Neck upper back ACOEM
- 8.30 Occ Med Company Profile form
- 8.31 Occ Med Form history, review of systems

- 8.32 Occ Med Form Med History
- 8.33 Occupational Health History
- 8.34 Occupational and Environmental Med Form
- 8.35 Oswestry
- 8.36 Pain Drawing form
- 8.37 PAIN Rating
- 8.38 PPE for employee Release of Information Form
- 8.39 PPE Release of Information Form.
- 8.40 Pulmonary Function Test follow up
- 8.41 RECOMMENDATION FOR PLACEMENT
- 8.42 Release of Information Form
- 8.43 Release of Information Form.
- 8.44 Respirator evaluation notification
- 8.45 REVIEW OF SYSTEMS
- 8.46 sample episodic service agreement for the Client.
- 8.47 Shoulder symptoms ACOEM
- 8.48 Symptom Severity Scale CTS
- 8.49 UDS + or BAT for employee Release of Information Form
- 8.50 UDS for employee Release of Information Form
- 8.51 UDS Release of Information Form.
- 8.52 Upper extremity questionnaire
- 8.53 Work Status Form Specific Restrictions
- 8.54 Work status form

## **9. SALES AND MARKETING**

- 9.00 About Section 9—Sales & Marketing
- 9.01 Rx for Phone Tagitis
- 9.02 Introductory Letter
- 9.03 Meeting Confirmation Letter
- 9.04 Anatomy of a Sales Interaction
- 9.05 Letter of Understanding
- 9.06 Follow-Up Letter
- 9.07 Post-Sale Thank You Note
- 9.08 Letter to Reinforce the Sale
- 9.9 Prototype Employer Proposal
- 9.10 Client Fact Sheet
- 9.11 Occupational Health Sales Professional Dictionary
- 9.12 Recommended Sales Call Verbiage
- 9.13 Saying the Right Thing
- 9.14 Scripted Responses to Common Questions
- 9.15 Scripts for Opening and Closing a Sales Call
- 9.16 Scripts for Providing Freebies
- 9.17 Physician as Marketer
- 9.18 Account Executive Job Description
- 9.19 Corporate Sales Manager Job Description
- 9.20 Communications Strategy
- 9.21 Prospect Qualification Matrix
- 9.22 Principles for Writing an Effective Business Plan
- 9.23 Prototype Market Research Questionnaire
- 9.24 Chronology of a Clinic Tour Visit
- 9.25 Tips for Using Email as a Marketing Tool
- 9.26 Ten Marketing Rules for the Market Leader
- 9.27 Leveraging Your Market Leadership
- 9.28 Developing an Employer Advisory Council
- 9.29 Employer Client Reference Listing

- 9.30 Annual Client Update Questionnaire
- 9.31 Prototype Compensation Package
- 9.32 Competitive Strength Worksheet
- 9.33 Sales Professional Time Sheet
- 9.34 Time Management Matrix
- 9.35 Sales Professional Prototype Schedule
- 9.36 Leadership Plan for the Sales Professional
- 9.37 Verbiage for Sales Position Advertisements
- 9.38 Tips for Public Speaking
- 9.39 Prototype Sales and Marketing Plan
- 9.40 Sales and Marketing Articles
  - 9.40.1 Social Networking as a Marketing Tactic (PDF)
  - 9.40.2 Workplace Education as a Marketing Tool (PDF)
  - 9.41 Proposal Development
    - 9.41.1 Prototype Service Agreement
    - 9.42.2 Sample RFP Draft Agreement
    - 9.43.3 Drug Testing Program Service Agreement

## **10. ENSURING OPTIMAL PATIENT SERVICE**

- 10.0 About Section 10—Patient Service
- 10.1 Prototype Patient Service Plan
- 10.2 Annual Client Update and Questionnaire
- 10.3 Sample Employer Satisfaction Survey
- 10.4 Program Meeting Agenda
- 10.5 Patient Satisfaction Form
- 10.6 Handling a Disgruntled Patient
- 10.7 Complaint Form
- 10.8 Legislation Affecting Occupational Health & Urgent Care Practice
- 10.9 Sample Authorization Form
- 10.10 Sample Quality Monitoring Plan

## **11. FINANCIAL MANAGEMENT**

- 11.0 About Section 11—Financial Management
- 11.1 Gross Revenue Projection Template
- 11.2 Occupational Health Expense Template
- 11.3 Evaluating the Value of Your Clinic
- 11.4 Sample Charge Sheet (XLS)
- 11.5 Billing and Coding

## **12. APPENDIX—USEFUL RESOURCES**

- Healthy Workforce 2020
- Occupational Health Education
- Recommended Resource List 2010
- Recommended Resources by Topic
- Recommended Texts and Periodicals
- Websites and Phone Numbers
- Workers Compensation Glossary