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# **Disability Management Module**

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User Guide – V 12.0

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January 6, 2025

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# Introduction

Disability Management will record short-term and long-term disability claims. Before Disability Management can capture specific information related to a claim there are several tables that need to be built.

## Options

### Action Emails

The Action Emails option allows the setup of email notifications to be sent to various personnel when a user performs one of the actions shown. Ensure that the email protocol has been set up under the Maintenance panel by clicking **Email Technical Setup**. This may require consultation with your I.T. Support Team.

**Note:** Before using this feature, all users and recipients must be setup in **Security**.

CF81 SMTP Email Server Information

SMTP Server Name:

Set the SMTP-server to the name or IP address of the SMTP server you will be using to send an email.

SMTP Port Number:

Set the SMTP-PORT to the port number the SMTP server listens on. Most use the default port of 25.

SMTP Authentication: 
 0 - No Authentication (default)  
 1 - CRAM-MD5    2 - Auth  
 3 - Plain        4 - NLM Auth    5 - Automatic

Set the SMTP-AUTHENTICATION to the authentication method desired. There are 4 different authentication protocols supported by SMTPSimple, in addition to allowing no authentication. CRAM-MD5 uses an MD5 hash key for password authentication. Auth and Plain are two other methods of password negotiation and authentication. Set the value as appropriate to your situation.

SMTP User Id:  Complete only if the authentication method chosen requires it.

SMTP Password (enter TWICE):  Complete only if the authentication method chosen requires it.

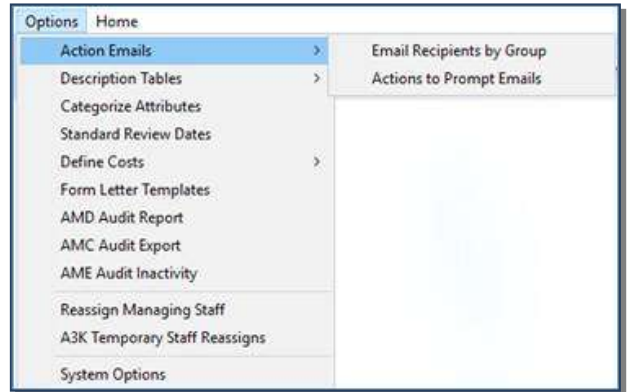
SMTP From Email:  Complete only if SMTP server must use internal domain name.

Default: noreply@parklanesys.com or noreply@yourdomain.com

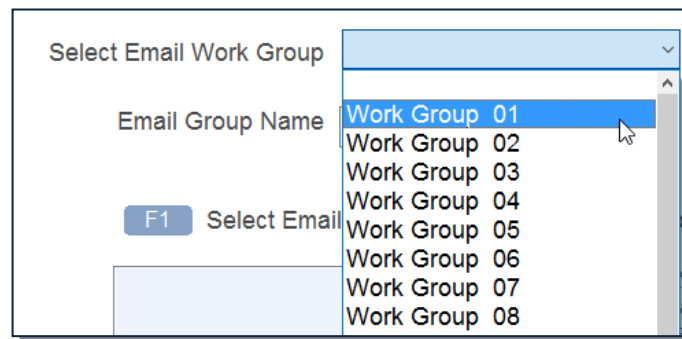
☐ Do not use Display Name (recommended for Office 365 only)

There are two options for sending Action Emails. An email will be sent to everyone that is in the email list for the specific **Action**, or an email will be sent to those who are in the same **Work Group** as the User.

**Work Groups** must be pre-defined when choosing the second option. Click on **Options/Action Emails/Email Recipients by Work Group**.



Click on the drop down for **Select Email Work Group** and click on a work group heading to rename.



Click on **F1>** and begin to select the email recipients for this Work Group. Enter the next available line number and click **Get-F1** to select the email recipient from the list provided. Up to 200 email recipients may be selected per Work Group.

CTB5 Users in Work Group

Work Group  
Clms CoOrd Group

Enter line number from from box on the right  
1

**F1** Get User Name From Security File

User ID  
KFERRELL

Name  
Karen - Clms Mgr

Email Address  
k.ferrell@parklanesys.com

Current List

1. Karen - Clms Mgr
2. Sara K
3. Doug Wells
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.
- 13.
- 14.
- 15.
- 16.
- 17.
- 18.
- 19.
- 20.
- 21.
- 22.
- 23.
- 24.
- 25.

SF7 Remove Name

Close F12

When an **Action** occurs, the system will determine what **Work Group(s)** the User is located in and will send an email to all other recipients within the Work Group(s).

To setup the **Action Emails** click on **Options/Action to Prompt Emails** and select the action(s) that should prompt an email notification.

For each Action shown, you can indicate which users will prompt an automatic email and which person(s) or workgroups will receive the email. Check the Action that should prompt an email.

CAB2 Action Emails

Make sure the email protocol has been setup under Maintenance

F5 Print

Check the Actions that should prompt an email notice

Action	Action By	Email To
<input checked="" type="checkbox"/> Added short term disability	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> Added long term disability	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input checked="" type="checkbox"/> Short term changed to long term	<input type="checkbox"/> Yes	<input type="checkbox"/>
<input type="checkbox"/> Long term changed to short term	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Date returned entered	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> First day off changed	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Added mid term disability	<input type="checkbox"/> Yes	<input type="checkbox"/>
<input type="checkbox"/> Short term changed to mid term	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Long term changed to mid term	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Mid term changed to short term	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Mid term change to long term	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Added new general comment	<input type="checkbox"/> Yes	<input type="checkbox"/>
<input type="checkbox"/> Added new confidential comment	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Added Document Link	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes

Email notifications can be sent to various personnel when a user performs one of the actions shown. For each action shown, you can indicate which users will prompt an automatic email and, which persons, or certain groups of people, will receive an email. Before using this feature, all users and recipients must be setup in Security.

How it works:  
Check the action that should prompt an email. Check the Action By box which will activate a pop-up window. Indicate the users that will prompt an email. Check the Email To box which will activate a pop-up window. Indicate the people who will be the recipients of the email. If you wish that an email be sent to people within a certain group depending on user, please enter those groups under Work Groups of Email Recipients first.

Click the **Action By** box which will activate a pop-up window. On this window indicate the users that will prompt an email to be sent. Up to 120 users can be identified.

Next, click the **Email To** box which will activate another pop-up window. On this window indicate the people who will be the recipients of the email. Up to 20 recipients can be identified.

Alternatively, click on the check box to **Send emails using Work Groups**. Once checked, all other fields will be grayed out. As previously described, when an **Action** occurs, the system will determine what **Work Group(s)** the User is located in and will send an email to all other recipients within the Work Group(s).



CTB2 Email Recipients resulting from an action

Action: Added short term disability SF7 Remove Name

☒ Send emails using Work Groups

Enter line number from box on the right

**Get F1** To select User Name from Security File.  
If not in Security, enter any ID, their name & email.  
Either way, click Submit to add to table.

User ID and Name:

Email Address:

**Submit F2:**

☐ Send an email to the Managing Staff,  
in addition to any users selected above.

**Current List**

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.
17.
18.
19.
20.

**Close F12**

Each time an Action is executed by a listed User, the Recipient will receive an email advising that the Action occurred.

**Sara Kane**

---

**From:** Health Safety Application [noreply@noreply.com]  
**Sent:** Tuesday, January 05, 2016 2:34 PM  
**To:** Sara Kane  
**Subject:** Notification of User Action

The following action was taken in the Parklane System.

--

Action: Short term changed to long term

--

Date: 05 Jan 16 at 14:33  
 User: Sara K

--

PKD-Company 1  
 Module: Disability Management  
 Employee: BRADLEY, BILL  
 Department: PLANT, Plant  
 Employee Key: 000079

--

Accident/Sickness Date: 01 Jul 09

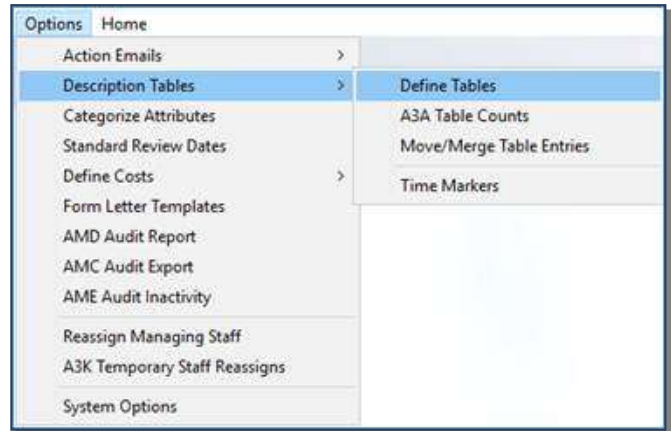
--

Please do not reply to this automated message.

## Description Tables

### Define Tables

To define the **Description Tables** click **Options/Description Tables** and select the table heading to be defined. These tables include Insurance Companies, Reasons, Medical Profiles, Medical Conditions, Results, Type of Appointments and Payee Names. Enter the **Description** Number and then press **Tab** to enter the Description. To define the next table click the appropriate push button or press the corresponding function key.



To print a copy of a table, press **Print Tables** and follow the screen instructions.

### A3A Table Counts

Version 12 Preview		Page 0001 A3A
Disability Management		Date 03 Mar 14
Table Counts		Time 09:51
Description / Counts		
Insurance Companies		
1 Sunlife 1 - Uniform		13
2 Sunlife 2 - Sr Off.		10
3 Sunlife 3 - Civilian		2
4 PRP		7
5 Sun Life		15
6 Manulife		2
7 UI 52 wks		
8 Sick Ben 15wks		10
9 Sick >5 days		

## Move/Merge Table Entries

Tagged entries may be moved or merged within a table. Run the A3A Table Counts report. Determine which Table No. the entries are from and the Table No. those entries are to move to. All users must be out of Disability Management before using this procedure.

Select the Table. Enter the From Table No. and the To Table No. and select **Go SF4**.

The screenshot shows the 'CA33 Move/Merge Table Entries' dialog box. At the top, it states: 'All users must be out of Disability Management before using this procedure.' Below this, there are two sections. The left section, titled 'Go to', contains a list of buttons: F1 Insurance Companies, F2 Reasons, F3 Medical Profiles, F4 Medical Conditions, F5 Case Closure Outcome, and F6 Appointment Types. The right section, titled 'Insurance Company', contains a list of 24 items: 1. Sunlife, 2. Manulife, 3. Sick Ben 15 Wks, 4. Sick >5 Days, 5. EI 52 Wks, 6. UI + Mat Top-up, 7. Mat-Modified, 8. No LT - MW Only, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24. Below these sections are two input fields: 'From Table no.' and 'To Table no.'. A 'Go SF4' button is located below the 'To Table no.' field. At the bottom left, there is a 'Recommendation' section with two numbered steps: 1. Before moving a table entry, produce a copy of report A3A table counts. 2. After you move a table entry, reproduce report A3A table counts. Compare new counts to the counts prior to the move. Below this is a note: 'If system should fail during processing: Determine problem and immediately redo last table entry move which will move the remaining table entries. This is critical.' At the bottom right, there is an 'Exit F12' button.

Several question boxes will appear and request confirmation of the move.

This dialog box is titled 'QUESTION CCHA33'. It contains a question mark icon and the text: 'You are about to merge one table entry with another. Proceed?'. At the bottom, there are two buttons: 'Yes' and 'No'.

This dialog box is titled 'QUESTION CCHA33'. It contains a question mark icon and the text: 'Are you sure?'. At the bottom, there are two buttons: 'Yes' and 'No'.

This dialog box is titled 'QUESTION CCHA33'. It contains a question mark icon and the text: 'Please confirm that everyone is out of this module or process will fail at some point. Proceed?'. At the bottom, there are two buttons: 'Yes' and 'No'.

This dialog box is titled 'CCHA33'. It contains an information icon and the text: 'Move Complete'. At the bottom, there is an 'OK' button.

It is recommended that once the move is complete, rerun the A3A Table Counts to ensure the tagged entries have moved to the selected table. Update the Table Description text if necessary.

It is critical that if the system should fail during processing, determine the problem and immediately redo the last table entry move which will move the remaining table entries.

## Time Markers

To setup the user-defined tables for Time Markers, from the main menu of Disability Management, click **Options/Description Tables/Time Markers**. The panel will default to the **Wait Times** table. Select the next available **Table no.** and then the **Description** field.



SF5 Print

Table no.

Description

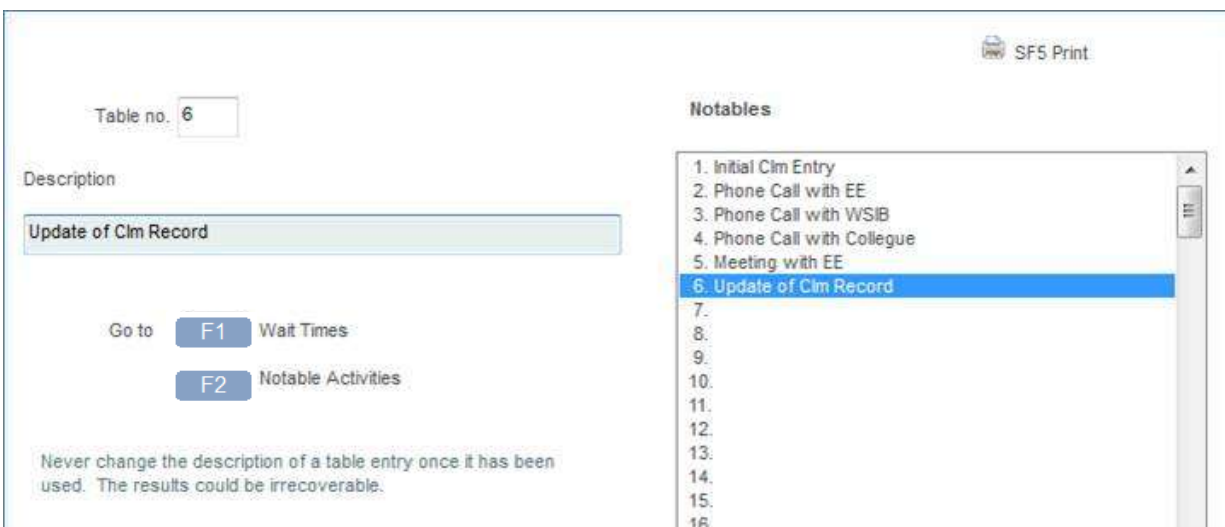
Go to  Wait Times  Notable Activities

Never change the description of a table entry once it has been used. The results could be irrecoverable.

Wait Times

1. Medical Documentation
2. Initial Clm Decision
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.
- 13.
- 14.
- 15.
- 16.

Once complete, click **F2 Notable Activities**. Select the next available **Table no.** and then the **Description** field.



SF5 Print

Table no.

Description

Go to  Wait Times  Notable Activities

Never change the description of a table entry once it has been used. The results could be irrecoverable.

Notables

1. Initial Clm Entry
2. Phone Call with EE
3. Phone Call with WSIB
4. Phone Call with Colleague
5. Meeting with EE
6. Update of Clm Record
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.
- 13.
- 14.
- 15.
- 16.

## Categorize Attributes

To streamline the process of selecting attributes from a large table, they can be organized by category. For this module, setup the categories for the attributes which apply. Any excluded attributes will no longer appear in this module. On any of the panels where attributes are available to you for selection, including reports, you can select the category and then select the required attribute from the list associated with that category. It is an easy step to switch to other categories.

To categorize attributes, from the main menu of Disability Management, click on **Options/Categorize Attributes**.

Using the arrow, select the next available category (initially the drop down list will show Category1, Category 2, etc.) and then type in the **Category Name** which you wish to use for your selection of attributes.

Select Category:

Category Name:

**F1 Select Attributes**

To streamline the process of locating an attribute, you may organize attributes by category. For this module, set up the categories for the attributes that apply. Any excluded attributes will not appear in this module.

**Tips:**  
On the screens where you are required to tag attributes, (including reports) you select the category, and are then shown the list of attributes from that category. It is an easy step to switch to other categories.

For controlled input purposes, you may also indicate that a particular category is mandatory, meaning that the user must select at least one attribute from that category before exiting the screen.

**How to:**  
1. From the Drop-down box, select a category (new ones too).  
2. Type the category name.  
3. Click Select Attributes and select the applicable Attributes.

**Exit F12**

Click on the **F1>Select Attributes** button and you will be presented with the **Attributes for Category** panel:

**CTC3**

Attributes For AGE GROUP Maximum 200 Selected 7

0251 AGE	252 <20 Years Old
0252 <20 Years Old	253 20-29 Years Old
0253 20-29 Years Old	254 30-39 Years Old
0254 30-39 Years Old	255 40-49 Years Old
0255 40-49 Years Old	256 50-59 Years Old
0256 50-59 Years Old	257 60-65 Years Old
0257 60-65 Years Old	258 >65 Year Old
0258 >65 Year Old	
0262 EXPERIENCE ON JOB:	
0263 <6 Months on Job	
0264 6 Mths. to 1 Yr on Job	
0265 1 to 5 Yrs on Job	
0266 5 to 10 Yrs on Job	
0267 10 to 15 Yrs on Job	
0268 15 to 20 Yrs on Job	
0269 >20 Yrs on Job	
0275 EQUIPMENT INVOLVED	
0276 Deep Fryer - M902	
0277 Deep Fryer - M1010	
0278 Deep Fryer - M2007	
0279 Box Cutter	
0280 Deli Slicer	
0281 Filing Cabinet	

**Go To Attribute**

001 F2

251 F3

501 F4

751 F5

**Find a code**

Go F8

**Find a name**

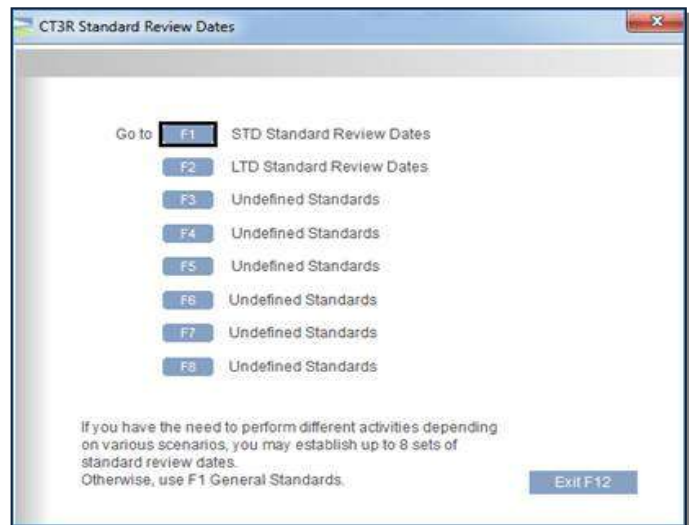
Go F9

Double click on those attributes which you wish to assign to this category. As you select the attributes they will appear in the box on the right. When finished, click on the Close-F12 button to return to the Categorize Attributes panel.

## Standard Review Dates

Standard Review Dates allow the setup of multiple sets of routine activities that are normally done when tracking or following up on a record.

Select a set identifier and enter a **Description** name for the set. You may enter routine follow-ups and identify the interval (number of days) in relations to the start date of the record. You may enter up to 50 pre-defined activities or procedures per set. The interval days will be used to determine the target date of the activity.

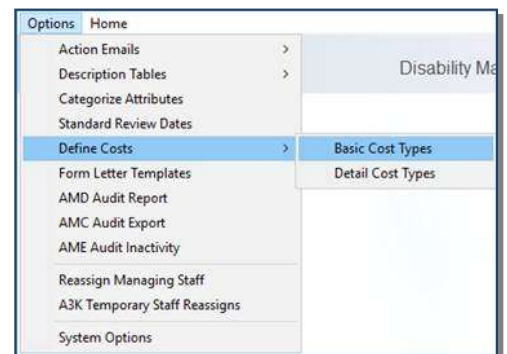


Once the Standard Review Dates are defined you may access the **Review Dates** panel of a new or current record and click on **Standards** and the system will provide the list of sets. Once a set is selected, the system will auto-fill those standard activities and determine the target date for each.

Description: STD Standard Review Dates		
Interval (Days)		Activity
1	5	Claim Forms received for processing?
2	7	Claim Forms forwarded to Ins Carrier
3	30	One Month Review
4	60	Two Month Review
5	90	Three Month Review
6	150	LTD in 30 Days - Send EE req'd LTD Forms
7	180	Change from STD to LTD
8		
9		

## Define Costs

Claim costs can be tracked based on 5 user-defined groups. Once you have determined the groups of costs to be tracked, you must define each in the **Basic Cost Types** table. Click on **Options/Define Costs** and click on **Basic Cost Types**. Press Tab and enter the first **Title**. Press Tab and enter an **Abbreviation** for the **Title**. Press Tab and enter a 'Y' if you would prefer these costs be excluded from module cost reports. Continue using the same process for the remaining Titles.





	Title	Abbreviation	Exclude?
1.	BENEFITS	BEN	
2.	REPLACEMENTS	REPLAC	
3.	MEDICAL COST	MED	
4.	FORMS	FORMS	
5.	LEGAL	LEGAL	

Complete a title and abbreviation for each of the basic cost types. If you exclude a cost from reports, enter "Y" in Exclude field. Don't leave blank lines between entries.

Abbreviation	Basic Cost Type	Basic Cost Types
BEN	1	1 BEN
REPLAC	2	2 REPLAC
MED	3	3 MED
FORMS	4	4 FORMS
LEGAL	5	5 LEGAL

Enter the full title and the abbreviated title of each detail cost type. Enter one of the valid Basic Cost Type Codes for each entry.

Detailed costs can also be tracked. Once you have determined the cost types to be tracked, you must define each in the **Detail Cost Types** table. Click on **Options/Define Costs** and click on **Detail Cost Types**. Press Tab and enter the first Title. Press Tab and enter an **Abbreviation** for the Title. Press Tab and enter the group number to which the cost type is associated.

## Form Letter Templates

Form Letters can be used to send notices or letters to your employees. To create up to 99 letters, click on **Options/Form Letter Templates**. Click on an undefined number.

Name your letter and then begin to compose the letter using text and variables

SL94 Select one from the list

1. Forms Received
2. 4 Wk Follow Up Ltr
3. STD Expiring Ltr
4. Not defined
5. Not defined
6. Not defined

CA36 FormLetterTemplates

d) Name of Form Letter: Forms Received

a)

<Today-->

<First and Last Name-->

<Address-->

<City, Province-->

<ZipPost-->

Dear <First Name-->,

RE: <Injury-->

DOI: <A&SDate-->

EE ID: <EE ID-->

We are in receipt of your completed Short Term Disability form. Please be advised that we will be forwarding your form to the insurance carrier by courier and expect a response with 7 to 10 business days.

Please contact this office at that time to arrange pickup of your benefit cheque.

Wishing you a speedy recovery and quick return to work. We miss you.

Yours truly,

[ name ]  
Claims Co-Ordinator

Sent Via Email <Today-->

b) Variables

Today's Date  
First Name  
Last Name  
First & Last Name  
Address  
City, Province  
Country  
Postal Zip Code  
Foreign Phone  
Date of Birth  
EE ID  
Department Code  
Department  
Position  
Home Phone  
Business Phone  
Supervisor  
First Day Off  
Reference  
A&S Date  
Expected RTW  
Med Rev Date  
Injury  
Employment Status  
Hire Date  
Union  
Age  
Gender  
Claim Type  
Managing Staff  
Man Staff Email

To indicate the location of a variable:  
1. Type ^ (Shift 6) in the letter.  
2. [Tab] at this point will move cursor to Variables.  
3. Click on or down/up arrows to variable name.  
4. Select F4.  
5. Variable will be inserted and cursor will return to the letter.

Page 1 F5  
Page 2 F7  
Page 3 F8

Select F4

f) Print Font Size: 9 pt 10 pt 12 pt

Changing font size may require reformatting your letter. Be sure to print a sample.

Instructions F1

Print F5 List F2 Exit F12

Click the **Instruction F1** button to see detailed instructions and additional features in **Form Letters**.



## Form Letter Templates

### Introduction

Form Letters give you the means to set up letters that you will use repeatedly.

You initially create a template for a letter and from that point on, you may easily produce personalized letters with the original text and applicable information included.

The letters may then be printed or emailed directly from the software. All emailed form letters are automatically added to Document Links.

A form letter may be one to three pages in length.

### How to Use

#### Template

Select a template from the list.

- For a new template, select the first 'Not Defined'.
- Provide a name or description of the template.
- Under "Variables" there is a list of the personalized information that can be inserted in the template.
- In the Template area, type the text as it is to appear in the letter.  
Where a variable is to be inserted, type ^ (Shift 6) and click on the appropriate variable. The software will reserve space for the variable.
- If you need more than one page, you may switch to Page 2, then Page 3. Three pages provided 24000 characters of text.
- Indicate the size of the font (9 pt, 10 pt or 12 pt).  
Due to font size and spacing, be sure to print a sample to ensure that text fits on the page.



To print a **Form Letter** for an individual you must access a specific incident and select **Form Letters** from the **Incident** Sidebar. Select the letter for printing and follow the screen instructions to complete your selection.

The screenshot shows the 'CA55 Form Letters' interface. The main area displays a letter template with the following content:

Sep 14, 2022  
 Peter Abrahams  
 210 Angela Street  
 London, ON  
 N4K 1R9

Dear Peter,

RE: Injury  
 DOI: Aug 15, 2022  
 EE ID: 125

We are in receipt of your completed Short Term Disability form. Please be advised that we will be forwarding your form to the insurance carrier by courier and expect a response with 7 to 10 business days.

Please contact this office at that time to arrange pickup of your benefit cheque.

Wishing you a speedy recovery and quick return to work. We miss you.

Yours truly,

[ name ]  
 Claims Co-ordinator

Sent Via Email Sep 14, 2022

On the right side, there is a sidebar with the following information:

Letter No. 1  
 Title: Forms Received

Reply Due [input field]  
 Last Printed [input field]

At the bottom right, there is a button labeled 'SF8 Email letter to: s.kane@parklanesys.com' and three buttons labeled 'P1 F2', 'P2 F3', and 'P3 F4'.

## AMD Audit

The AMD Audit Report provides several options to sort and generate audit reports related to entered data.

The screenshot shows the 'AMD Audit Report' interface. The main area displays the following options:

SL3B Select Managing Staff Member

- F1 Select all
- F2 Select your name
- F3 Select a person from list

SL42 Select one option

- F1 Sort by Date Entered
- F2 Sort by Record Date
- F3 Sort by Employee
- F4 Sort by Fields
- F5 Sort by User

SL57 Enter dates for selecting records

Start Date [input field] [calendar icon]

Ending Date [input field] [calendar icon]

F1 Use today's date  
 F2 Get all records  
 F3 Start with oldest record

SF5 Use your last dates Oldest Date - 12/05/2017

GoBack Esc Continue F5 Exit F12

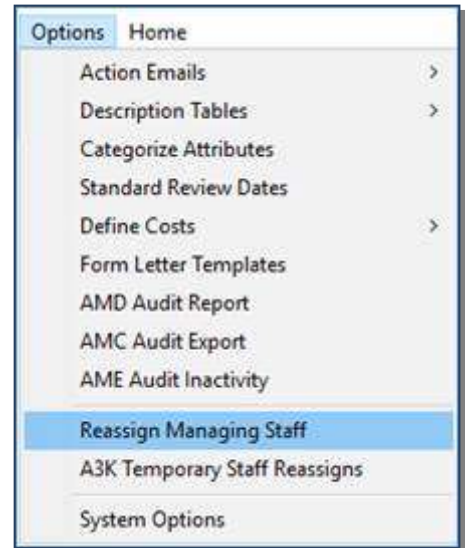
SL42 Select one option

- F1 Continue
- F2 Select a specific Action
- F3 Select a specific Field

## Reassign Managing Staff

As staff depart, vacation, take leave, or changes in user caseload are necessary, this utility provides the ability to permanently or temporarily change the Managing Staff field on all open records and/or outstanding Review Dates from one User ID to another. In the case of a temporary reassignment, the records can be reassigned back to the original user or another user.

Under **Options** select **Reassign Managing Staff**. Select the intended procedure by clicking on the radio button. Type or select the User ID of the Managing Staff the records will come from, then type or select the User ID of the Managing Staff the records will be reassigned to. Ensure the appropriate check boxes are tagged for the changes and press **Continue F5**.



The 'Managing Staff' window displays the following information:

**CT3L Change Managing Staff**

Indicate which procedure to perform:

- ☐ Permanently assign records from one Staff Member to another.
- ☒ Regarding a Staff Member who is temporarily unavailable: Assign records to another staff member with the intention those records might be reassigned back or, to another person.
- ☐ Referring to records that have been temporarily assigned to another Staff Member: Reassign those records to the original or another staff member.

From: Type User ID of Managing Staff or, select from table. **KFERRELL** **F2**

To: Select Managing Staff from table. **SARA** **F3**

**KAREN - CLMS MGR** **SARA K**

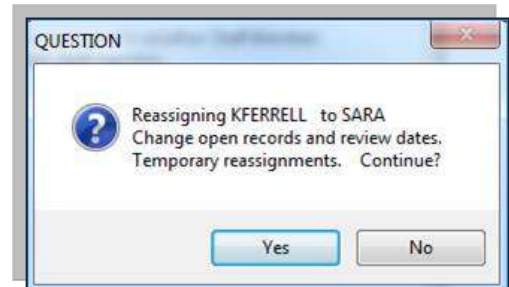
☒ Change Managing Staff on open records

☒ Change Managing Staff on outstanding review dates

Changes will be recorded in Audit

**Continue F5** **Exit F12**

A question box will appear asking for confirmation of the reassignment.



Once the utility is complete, reports will be generated which provide the details of the reassignment.

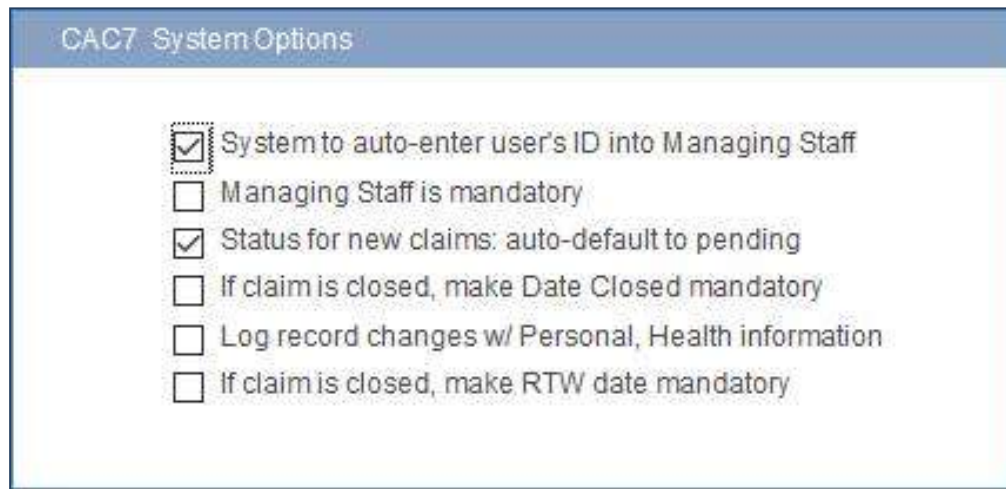
PKD-Company 1 Disability Management Records Reassigned from KFERRELL to SARA Temporarily Assign					Page 0001 A3L Date 30 Mar 17 Time 12:16
Employee	CTaim	Date			Key
BLACK, SARA 292 F/t					

PKD-Company 1 Disability Management Records Reassigned from KFERRELL to SARA Temporarily Assign					Page 0002 A3L Date 30 Mar 17 Time 12:16
Employee	CTaim	Date	Date	To Be Done	Key
Review Dates					
AARDON, PETER 125 tF/t	14 Nov 14	22 Jan 16	Letter, StartDt 14 Nov 14, Consent Form COV Sample		25
GORDON, SHAWN 2134 F/t	13 Jun 16	10 Nov 16	LTD in 30 Days - Send EE req'd LTD Forms		134
GORDON, SHAWN 2134 F/t	13 Jun 16	19 Jul 16	xx		134

## System Options

System Options provides for the selection of system setup preferences. Select the appropriate check box to activate the option.



The screenshot shows a dialog box titled "CAC7 System Options". It contains a list of six system preferences, each with a checkbox. The first and third options are checked, while the others are unchecked.

Option	Checked
<input checked="" type="checkbox"/> System to auto-enter user's ID into Managing Staff	Yes
<input type="checkbox"/> Managing Staff is mandatory	No
<input checked="" type="checkbox"/> Status for new claims: auto-default to pending	Yes
<input type="checkbox"/> If claim is closed, make Date Closed mandatory	No
<input type="checkbox"/> Log record changes w/ Personal, Health information	No
<input type="checkbox"/> If claim is closed, make RTW date mandatory	No

# Add / Open a Claim Record

When an employee is placed on Short Term Disability (STD) or Long Term Disability (LTD), add the claim by clicking on **Manage Claims/New Claim**, or **1. Add new claim** from the Sidebar menu.

## Record Description

Once you have selected the employee the **Record Description** screen will appear.

CA41 Record Description

☒ a) Short Term      ☐ Was an occupational claim  
☐ Long Term  
☐ Mid Term

b) Date of Accident or Sickness: 05/03/2023  
 First Day Off: 06/03/2023  
 Reference: 23-159-01  
 Insurance Co.: Sick Ben 15 Wks  
 Medical Review Date: 02/06/2023  
 Expected Return: 27/03/2023  
 f) Date Returned:   
 Case Closure Outcome:   
 Comments:   
 Date:   
 Guideline expected RTW: 05/04/2023  
 Position: ASSOCIATE  
 Union: UNION A

d) Managing Staff: SARA  
☐ Closed  
☐ Inactive  
 f) Reason: Injury  
 Nature: It ankle fracture  
 More Info: fell off ladder  
 Department: PLANT  
 Supervisor: Brad Grantham  
 g) Notes:   
☐ n) Modified Duties  
 MDut Start:   
 MDut Stop:   
 Limitation:   
☐ k) Had a Recurrence

☐ Pending      ☐ No Further Action  
☒ Approved      ☐ N/A      ☐ Denied  
 Status Date:   
 Entered: SARA      09/03/2023

[Ctrl Return] Go to another panel;  
 [Ctrl a, etc] Move to field labeled a) etc.

PrvPg C-Q    NxPg C-W    Index C-F12    Next Esc    Home F

CA41 Record Description

☒ a) Short Term  
☐ Long Term  
☐ Mid Term

Select **Short Term Disability**, **Mid Term Disability** or **Long Term Disability** by clicking on the appropriate radio button. Continue completing current data that you have available. As the claim progresses, other fields will require completion.

On this first panel of the record, there are two fields that must be completed. Short Term Disability, Mid Term Disability or Long Term Disability, and Date of A/S, or First Day Off. All other fields regarding the claim are optional.

The screenshot shows a form panel with the following elements:

- Radio buttons for claim type: ☒ a] Short Term, ☐ Long Term, ☐ Mid Term.
- Checkbox: ☐ Was an occupational claim.
- Date fields:   
b] Date of Accident or Sickness: 05/03/2023   
First Day Off: 06/03/2023
- Reference: 23-159-01
- Insurance Co.: Sick Ben 15 Wks
- Buttons: A blue button with a checkmark icon and an F8 key icon are located to the right of the Insurance Co. field.

Situations may arise in which an incident originally reported as occupational changes to non-occupational. In such cases, the user has the option to prompt the system to copy information from that incident into a disability claim. When adding the claim, click on the check box for **Originally Occupational Claim**. A note will appear with instructions to click on the **F5** button to copy information from the incident. Please note the copy will not replace any fields already completed in the claim. Click the F5 button to initiate the copy process.

**CA41 Record Description**

☒ a) Short Term  
☐ Long Term  
☐ Mid Term

☒ Was an occupational claim

b) Date of Accident or Sickness: 05/03/2023  
 First Day Off: 05/03/2023  
 Reference: 23-158-01  
 Insurance Co.: Sick Ben 15 Wks  
 Medical Review Date: 02/06/2023  
 Expected Return: 27/03/2023  
 f) Date Returned:   
 Case Closure Outcome:   
 Comments:   
 Date:   
 Position: ASSOCIATE  
 Union: UNION A

d) Managing Staff: SARA  
☐ Closed  
☐ Inactive  
 f) Reason: Injury  
 Nature: It ankle fracture  
 More Info: fell off ladder  
 Department: PLANT  
 Supervisor: Brad Grantham  
 g) Notes: Included optionally on A21/A2G exports only.  
☐ n) Modified Duties  
☐ k) Had a Recurrence  
 MDut Start:   
 MDut Stop:   
 Limitation: ..  
 Entered: SARA 04/08/2023

☐ Pending  
☒ Approved  
☐ No Further Action  
☐ N/A  
☐ Denied  
 Status Date:

The employee's List of Incidents will appear from the Incident Reporting/WSIB Claims Management Module. Click on the incident to be copied over to the Disability Claims Management Module.

Parklane

CA06 List of Claims BEN AFFLECK Full-time 1111 PARKING METERS N170 Age 60 Key 170


	Date	Reference	Description	Link Folder	Closed
1.	02 Sep 24	STD	broken left ankle		
2.	19 Aug 24	STD			
3.	18 Jul 24	STD			
4.	04 Jul 24	STD AB48579	Broken foot	Link Folder	

The fields copied include Accident Date, First Day Off, Expected RTW Date, RTW Date, Injury, Physician, Department, Attributes, Modified Duties Fields and Comments. A message box will ask if Document Links should be included.

Once a Short Term Disability claim is established, there may be occasion where the employee exhausts benefit eligibility and must move to a Long Term Disability status. When changing the claim classification a confirmation panel will appear.

When the change is confirmed, a panel will be available to review the original Short Term Disability information.

QUESTION

 **STD was changed to LTD**  
Is this your intention?

Yes

No

The information in the fields noted below may be changed on the Description panel to reflect long term claim information without losing the prior information entered for the short term claim.

CA4F STD Claim information

Date of A/S

05/03/2023

First Day Off

06/03/2023

Expected Return

27/03/2023

Date Returned

Reference

23-159-01

Date Submitted

06/03/2023

Benefit Commencement

06/03/2023

Benefit Payment

Effective Date

End of Benefit Period

09/06/2023

Insurance Company

Sick Ben 15 Wks

Comments



## Medical Condition

01 Record Description
02 Medical Condition
03 Medical Part 2
04 Benefits & Reporting
05 Attributes
06 General Comments
07 Confidential Comms
08 Days & Costs
09 Review Dates
10 Appointments
11 Form Letters
12 Key Notes
13 Document Folder
14 Document Links
15 Guideline Worksheet

Multiple panels are used to track a claim. Select the appropriate panel from the Sidebar menu.

Clicking on **Medical Condition** (Panel 1 and Panel 2) produces two screens in which you will choose the appropriate descriptions, as they apply to this claim, from the tables previously defined under **Options**. Press the Arrow to see the corresponding table for the chosen heading. When the table appears, click on your selection to auto-fill the field. Use the Sidebar menu to move to the next panel.

CA32 Medical Profiles

Cardiovascular
Digestive
Immune
Lymphatic
MusSkeletal
Nervous
Psychiatric
Reproductive
Respiratory
Sensory

CA42 Medical Condition

a) Medical Profile MusSkeletal F7

Condition Fracture F2

F3

F4

F5

F6

b) Other



CA43 Medical Part 2

Physician

Notes

☐ Disabled

Comments

☐ Pregnant

Delivery due date

Comments

Benefits

The **Benefits** panel allows the user to document additional benefit information relative to the claim. Complete any appropriate fields and click the Sidebar menu to select the next panel.

01 Record Description

02 Medical Condition

03 Medical Part 2

04 Benefits & Reporting

05 Attributes

06 General Comments

07 Confidential Comms

08 Days & Costs

09 Review Dates

10 Appointments

11 Form Letters

12 Key Notes

13 Document Folder

14 Document Links

15 Guideline Worksheet

CA56 Benefits & Reporting

Date Submitted

06/03/2023

Benefit Commence

06/03/2023

Benefit Payment

520.00

Effective Date

End of Benefit Period

09/06/2023

## Attributes

- 01 Record Description
- 02 Medical Condition
- 03 Medical Part 2
- 04 Benefits & Reporting
- 05 Attributes
- 06 General Comments
- 07 Confidential Comms
- 08 Days & Costs
- 09 Review Dates
- 10 Appointments
- 11 Form Letters
- 12 Key Notes
- 13 Document Folder
- 14 Document Links
- 15 Guideline Worksheet

The **Attribute** panel allows the user to tag appropriate descriptions related to this claim from the table provided. Click on your selection and click **F3 Select**. Should you select an incorrect Attribute, click on your selection and click **F4 Deselect**. A maximum of 35 Attributes may be selected. Use the Sidebar menu to select the next panel.

CTC2 Attributes
Maximum 35
Selected 3

a] Select Category, then click on >>

BODY PART  
 INJURY/CONDITION  
 AGE GROUP

F2  
>>

b] Select Attribute, then click on >>

F5  
>>

d] Attributes Selected

Ankle LT  
 Fracture  
 40-49 Yrs Old

To remove, double click on selected Attribute or down arrow and press enter

## Comments

The **Comments** screen allows the user to document unlimited **General** or **Confidential** comments regarding this claim. The date field will default to the current date but can be changed if necessary. Select General or Confidential Comments at the right of this panel. To see comments press Page Up, Page Down, First Page or Last Page also at the right of this panel.

06 General Comments  
07 Confidential Comms

The screenshot displays two overlapping windows from the Disability Management Module. The top window, titled 'CTM1 General Comments', features a header with 'F2 Add Record' and 'F5 Print' icons. Below the header, it shows 'STD', 'A/S Date: 05 Mar 23', and 'First Day Off: 06 Mar 23'. A 'Date' field is set to '04/08/2023'. On the left, there are fields for 'Entered' (SARA, 04/08/2023, 10:32) and 'Changed'. A large text area labeled 'General Comments panel' is on the right, with navigation buttons '< >' and '< Page Up / > Page Down'. The bottom window, titled 'CTM2 Confidential Comments', has a similar header and date information. Its 'Date' field is also '04/08/2023'. The left side shows 'Entered' (SARA, 04/08/2023, 10:33) and 'Changed' fields. A large text area labeled 'Confidential Comment panel' is on the right, with navigation buttons '< >' and '< Page Up / > Page Down'. At the bottom right of this window, there is a '(25)' indicator and buttons for 'First Pg F6' and 'Last Pg F7'.

In **Security**, a user can be denied access to either or both General and Confidential Comments panels. An option is also available to secure the comment text from any changes. Contact Parklane support for further instructions

## Days & Costs Summary

- 01 Record Description
- 02 Medical Condition
- 03 Medical Part 2
- 04 Benefits & Reporting
- 05 Attributes
- 06 General Comments
- 07 Confidential Comms
- 08 Days & Costs**
- 09 Review Dates
- 10 Appointments
- 11 Form Letters

The **Days & Cost Summary** panel allows the user to track days lost related to this claim along with any costs associated with the categories previously defined under **Options**. Days lost can be manually entered here. Alternatively, the Enter Days or Enter Costs features under Manage Claims can be used for multiple entries. (See Enter Days Lost & Cost information in this guide.)

Use the Sidebar menu to select the next panel.

CA46 Days and Costs Summary F2 Print < >

2023	Days	BENEFITS	REPLACEMENT	MEDICAL COST	FORMS	LEGAL
January						
February						
March	15.0			50.00		
April						
May		650.00	650.00			
June						
July						
August						
September						
October						
November						
December						
<hr/>						
Total this year	15.0	650.00	650.00	50.00		
Claim total	15.0	650.00	650.00	50.00		

## Review Dates

Activities or follow-ups for an employee may be tracked under **Review Dates**. Pull pre-defined reviews by clicking **Standards F6** or click on **Add Activity**. Enter a date of the activity and tab to the User ID. The **User ID** will auto-fill based on the user currently logged into the system. The User responsible for completing the activity may be changed by clicking on the arrow at the top of the User ID column or by clicking the **Change User F9** button at the right of the panel. Tab to the **Activity** field and enter text instructions related to the activity. The **Done** checkbox will auto-fill a review date item, stamping it with today's date and the User ID of the user currently logged into the system.

	Date	User Id	Activity	Done	Details
1	20/03/2023	CLAUDETTE	check to send form letter next week	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	24/03/2023	SARA	Medical Review	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	05/04/2023	SARA	One Month Review	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	05/05/2023	SARA	Two Month Review	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	18/05/2023	SARA	Letter, StartDt 06 Mar 23, Consent Form COV Sample	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6	02/06/2023	SARA	Medical Review	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7	04/06/2023	SARA	Three Month Review	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8	03/08/2023	SARA	LTD in 30 Days - Send EE req'd LTD Forms	<input type="checkbox"/>	<input type="checkbox"/>

Buttons on the right: Standards F6, ReAssign F9, Date Sort F3, To Do F4, Show All F7, Overdue F8, Archive SF4.

The **View** checkbox will open a subsequent panel which allows the user to enter text related to the **Action** taken related to the Activity, and enter a **Completion Date** for the Action. The system will auto-fill the **Done** checkbox. Do NOT check this box because it will overwrite your action.

Archive SF4 will place completed review dates in an accessible spreadsheet.

Several reports are available related to Disability Management Review Dates.

CA4A Activity Details

Target Date: 04/06/2023

User: SARA (SF1)

Activity: Three Month Review

Action: Completed on 14 Jun 23 by SARA ☒ Done

Completion Date: 14/06/2023

Exit F12

## Appointments

- 01 Record Description
- 02 Medical Condition
- 03 Medical Part 2
- 04 Benefits & Reporting
- 05 Attributes
- 06 General Comments
- 07 Confidential Comms
- 08 Days & Costs
- 09 Review Dates
- 10 Appointments**
- 11 Form Letters
- 12 Key Notes
- 13 Document Folder
- 14 Document Links
- 15 Guideline Worksheet

The **Appointment** screen allows the user to track any ongoing appointments or absences. Enter the date and time the worker leaves your facility and when they return. The system will calculate the hours and portion of the day the worker has missed. Continue and enter the Appointment Type and Reason.

CA48 Appointments								SF7 Remove Record		
	Date	Time	Date Returned	Time	Hours Off	Days Off	Appointment Type	F3	Reason	F4 to enter
1	02/05/2023	10:30	02/05/2023	12:30	2:00		Specialists Appt		reassessment	
2										

CA48a Reason
reassessment

Close F12

## Form Letters

- 01 Record Description
- 02 Medical Condition
- 03 Medical Part 2
- 04 Benefits & Reporting
- 05 Attributes
- 06 General Comments
- 07 Confidential Comms
- 08 Days & Costs
- 09 Review Dates
- 10 Appointments
- 11 Form Letters**
- 12 Key Notes
- 13 Document Folder
- 14 Document Links
- 15 Guideline Worksheet

To generate a form letter for an employee click on **Get Template** and select from the drop down list provided. The variables associated with the chosen template will auto-fill as the form letter is displayed. Text may be inserted or deleted throughout the letter is required. Doing so will not change the master form letter template content. Each letter may be a maximum of three pages in length.

Print the letter by clicking on **Print to PDF**. Once the PDF opens, all application features are available to the user. Clicking Print will send the letter to a default printer to create a paper copy.

Clicking **Link Doc** will store the letter for future reference on the Document Links panel of the record.

By entering a **Reply Due Date** and clicking on **Add Reminder**, the system will add an activity to the Review Date panel of the record.

When a form letter appears outdated, click **Reset Letter** to initialize the panel to the master form letter template content.

To send the letter, click **SF8 Email letter to**: This opens a panel in which the worker's email address will auto-fill, allow for the additional recipients and provide editable text indicating the Form Letter is an attachment to the email. Ten additional attachments may be sent with the letter by clicking attach File F9 or Doc Link SF9 and selecting a file from the browser or from the list of document links. A copy of the letter, a copy of the email and a copy of each additional attachment will be automatically added to Document Links. The emailed Form Letter, the Letter Attachment and all additional attachments will be recorded in the TMB Audit.

The screenshot displays the 'CA55 Form Letters' interface. At the top, there are navigation buttons: 'F6 Get Template', 'F5 Print PDF', 'SF5 Link Doc', 'F8 Add Reminder', and 'F7 Reset Letter'. The main area shows a form letter template with the following content:

Aug 04, 2023

Greg Adams  
132 Smith ST  
London, ON  
N6P 1J6

Dear Greg,

RE: It ankle fracture  
DOI: Mar 05, 2023  
EE ID: 359

We are in receipt of your completed Short Term Disability form. Please be advised that we will be forwarding your form to the insurance carrier by courier and expect a response with 7 to 10 business days.

Please contact this office at that time to arrange pickup of your benefit cheque.

Wishing you a speedy recovery and quick return to work. We miss you.

Yours truly,

Sara Kane  
Claims Co-Ordinator

Sent Via Email Aug 04, 2023

On the right-hand side, there is a panel with the following fields and options:

- Letter No. 1
- Title Forms Received
- Reply Due
- Last Printed
- SF8 Email letter to: s.kane@parkdanesys.com
- Buttons: P1 F2, P2 F3, P3 F4

## Key Notes

- 01 Record Description
- 02 Medical Condition
- 03 Medical Part 2
- 04 Benefits & Reporting
- 05 Attributes
- 06 General Comments
- 07 Confidential Comms
- 08 Days & Costs
- 09 Review Dates
- 10 Appointments
- 11 Form Letters
- 12 Key Notes**
- 13 Document Folder
- 14 Document Links
- 15 Guideline Worksheet

In circumstances where critical information for colleagues may be vital specific to this claim, the **Key Notes** panel provides two options. A pop-up comment that will appear every time the incident is accessed by a user or a report comment that will print on reports related to this incident.

This panel includes an option to move a claim. If a claim is accidentally recorded under the wrong employee, you may move it to another employee. You will require a password from Parklane to proceed. Once the password is entered, identify the employee the claim should move to and confirm the move. Immediately run the Validate Records utility, as instructed, by pressing SF1 at the menu panel and selecting Utilities.

**CA53 Key Notes**

Notes for Screens & Reports

Comments entered below will appear everytime this claim is accessed by a user

Comments entered below will appear on reports with this claim

Internal record number for this claim: 000243

**SF9** Move this claim:  
If this claim was accidently recorded under the wrong employee, you may move it to another employee. You will require a password from Parklane support.



## Document Folder

- 01 Record Description
- 02 Medical Condition
- 03 Medical Part 2
- 04 Benefits & Reporting
- 05 Attributes
- 06 General Comments
- 07 Confidential Comms
- 08 Days & Costs
- 09 Review Dates
- 10 Appointments
- 11 Form Letters
- 12 Key Notes
- 13 Document Folder
- 14 Document Links
- 15 Guideline Worksheet

The **Document Folder** feature allows the user to paste text documents or type notes for future review. (Text only, no pictures or images.) The maximum number of characters is 8,000 (equivalent to approximately two pages of a Word document). The format of the document may vary slightly from the original document. Once a document is entered, changes may be made until midnight and only by the original author. The **See List** feature lists all the documents in the Document Folders.

Access to the **Remove** function is controlled by Security. **Remove** will delete the Document Folder.

CA52 Document Folder

F4 Add Record

F2 See List

F5 Print

F7 Remove

Reference

Letter from Bill

<

>

Pg Up

Pg Dn

Rule 1: Life is not fair - get used to it.

Rule 2: The world won't care about your self-esteem. The world will expect you accomplish something BEFORE you feel good about yourself.

Rule 3: You will NOT make \$40,000 a year right out of high school. You won't be a vice-president with a car phone until you earn both.

Rule 4: If you think your teacher is tough, wait till you get a boss.

Any Document Folder that you add can be changed by you only until midnight. After that

Entered by:

SARA

04/08/2023

12:31

Page 33.

## Document Links

01 Record Description
02 Medical Condition
03 Medical Part 2
04 Benefits & Reporting
05 Attributes
06 General Comments
07 Confidential Comms
08 Days & Costs
09 Review Dates
10 Appointments
11 Form Letters
12 Key Notes
13 Document Folder
14 Document Links
15 Guideline Worksheet

The **Documents Links** feature allows the user to link and view documents that are related to the employee.

Documents that can be linked include, but are not limited to:

- Documents (.doc, .pdf)
- Images (.jpg, .gif)
- Spreadsheets (.xls)
- Emails (.msg, .html)

In Personal Data, documents are linked directly to the employee. Move the cursor to the **Origin** column of the first blank line. Enter an **Origin** and **Description** of the document. The system will auto-fill the user and date entered. Click on **Link**. The Windows dialogue box will open and allow the selection of the document to be linked. A note will appear confirming the document was linked successfully.

To see a document, highlight the appropriate line and click **View**. The system will call up that image. Up to 800 documents may be linked to one employee.

Access to the **Remove** function is controlled by Security.

For details on Document Types, Scanning Documents, Location of Original Document, and other considerations, please refer to Parklane Support of the Special Features User Guide.

CTL1 Document Links F8 Sort Docs F5 Find a document No of Links: 3

No.	User	Date		Origin	Doc Date	Description
1	SARA	06/04/2023	x	LtrEmailed	06/04/2023	Concent Form COV Sample
2	SARA	06/04/2023	x	EmailSent	06/04/2023	Message Concent Form COV Sample
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						

\*Indicates no document was linked; x = Document may not be deleted.

Link F4

View F2

GoToBlank F9

FileName F3

Link url SF1

Go to Links:

001-100 F6

101-200 F7

201-300 SF3

301-400 SF4

401-500 SF5

501-600 SF6

601-700 SF8

701-800 SF9

SF7 Remove Link

## Guideline Worksheet

This worksheet allows for easy access to Disability Guidelines (DG) subscriptions and retrieval of pertinent information about injuries/illnesses, including expected days off.

The first time you visit this page, default websites are provided. While valid, it is assumed that your company will replace them with your preferences. Using your web browser, go to the home page of your preferred website. Copy the web address into the clipboard. Open this panel and click on the appropriate paste icon, ICD URL or Guide URL. The system will copy the address from the clipboard and store it for all future uses.

Click the button to access your website that will provide you with the correct ICD-9/10 code. For future reference, enter the code onto the worksheet. Click the button to access your Disability Guidelines website and find the appropriate ICD-9/10 information page. From that reference information, determine the expected number of days off and enter in the Expected Duration field. Prompt the system to determine the expected return to work date by clicking F9.

Reference material from the Disability Guideline may be kept for future access. Keep the entire web page or select specific excerpts. To keep the entire web page, print the page to a pdf and store in a temporary directory. Click on the Save button, point to the pdf and the system will store a copy of the pdf in its folder. Alternatively, you may copy the entire page into a word document and follow the same process as above. To retrieve the pdf, click on the View F3 button. To replace the material with another document, click the Replace button and repeat the process.

If you prefer not to use a pdf or word document, you may paste portions of the page into the Notes field provided. Keep in mind that the original format of the page may not remain intact and you are limited to 8,000 characters.

**CA59 Guideline Worksheet**

ICD/CSA Web:  F7

Guideline Web:  F8

a) ICD/CSA Code:  ICD-11  Save F2

Start Date:

Exp. Duration:  Days F9 Calculate Expected Return

Guideline RTW:

Medical Profile: MusSkeletal

Condition: Fracture

b) Comments (1000 characters)

d) Notes (8000 characters)

**Fractures**  
This section is an excerpt from Ankle fracture. [edit]

Fracture of both sides of the ankle with dislocation as seen on anteroposterior X-ray. (1) fibula, (2) tibia, (arrow) medial malleolus, (arrowhead) lateral malleolus  
An ankle fracture is a break of one or more of the bones that make up the ankle joint.[20] Symptoms may include pain, swelling, bruising, and an inability to walk on the injured leg.[20] Complications may include an associated high ankle sprain, compartment syndrome, stiffness, malunion, and post-traumatic arthritis.[20][21]

Ankle fractures may result from excessive stress on the joint such as from rolling an ankle or from blunt trauma.[20][21] Types of ankle fractures include lateral malleolus, medial malleolus, posterior malleolus, bimalleolar, and trimalleolar fractures.[20] The Ottawa ankle rule can help determine the need for X-rays.[21] Special X-ray views called stress views help determine whether an ankle fracture is unstable.

## TMB Audit

This audit report will show actions by users for the current incident.

SL42 Select one option

F1 Sort by Date

F2 Sort by Fields

CT99 View Report

Search:

Print Print to Pdf < > < >

Page: 1 of 1

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Parklane Demo Data

Audit

Actions on or after Dec 06 13

Name: BENSON, JOAN ID: 1120 Status: Full-time

Department: ADMIN, Administration Position: TEACHER D.O.B.: Jan 01 09 Key: 120

Date	Time	User	Action	Field	Was	Now
Dec 06 13	16:05	SARA	Record access			
Mar 20 14	12:00	SARA	Record access			

Page 0001 TMB

Date Mar 20 14

Time 12:01

## User Notes & Email

The User Notes & Email panel provides three features:

- A Note area to enter text, which will globally pop-up in any module opened for the specific employee. The system will auto-fill the original user name and date entered, along with user name and date of most recent edit. A date field is also provided to automatically remove the note if time sensitive.
- **F2 Open mailto to send email to this employee** wherein an email will open applying the employee email address from Personal Data. If no email address exists in Personal Data for the employee, a completely blank email will open. Proceed by entering Subject and the email text.
- **F3 Open mailto to send email to another user** wherein the list of Parklane Users will appear at which point clicking on a name will open applying the users email address from Security. When using either email option, a copy of the email will be added to your Email Program's sent folder.

**CTL9 User Notes & Email**

These notes will be shown to a user when they access this employee anywhere in the system. They are available to only those who have access to this panel.

a] Notes

This is for a global note that will appear everywhere in Parklane whenever you access this specific employee

b] Enter date if these notes are to removed automatically

Entered by SARA

Date 04/08/2023

Edited by

Date

Employee's Email: s.kane@parklanesys.com

F2 > Send email to this employee

F3 > Send email to another user

Copy of email will be added to your Email Program's Sent folder

## Demographics

The **Demographics** panel provides a read-only pop-up of the employee's general demographic information. The Demographics panel is available in various module records for easy reference. **Security** controls which users will have access to the Demographics pop-up on module by module basis.

**CT35 Demographics**

Surname AFFLECK	Department TES Parking - Meters
Given Name BEN	Employee Id. N170
Address 155 NUT ROAD	Status Full-time
City, Prov. State LONDON ONTARIO	Position PARKING METERS
Country CANADA	Hire Date 01/02/2012
Postal/Zip Code G1X5C3	Union UNION A
Home Phone 416 222-2222	Supervisor FERRELL, KAREN JOAN
Business Phone 519 657-3386 2240	SUPPORT
Cell, Foreign 416 222-3333	
Birth Date 10/10/1964	Daily Hours 8:00
Age 60	Weekly Hours 40.00
Sex Male	Work Hours 8:00 to 17:00
Marital Status Married	Miscellaneous MISC 1 FIELD
Language ENGLISH	Key 170
Business Email k.ferrell@parklanesys.com	
Personal Email	

## In a Nutshell

The Employee Records **In a Nutshell** provides the user with a one-page overview of an employee's current records from various modules. The modules included are Incident Reporting, Disability Management, Work Accommodation, Attendance Management and Chart.

Depending on the user's **Security** access, checkboxes to the right provide access to more detailed record information. The "R" checkbox opens the actual record and the "C" checkbox opens the General Comments related to the record. In the case of Incident Reporting, Disability Management, Work Accommodation we can see the most current five records. Attendance Management will show the most current twenty-five records, as well as an indicator and date if the employee is in an Attendance Case Management Program. The date of the last Health Centre visit is provided from the Chart module.

**CTLA Employee Records in a Nutshell**

Click check box under "R" to access actual record.  
Click check box under "C" to view general comments.

**Incident Reporting:** Last 5 recorded incidents showing residues hazards

Inc. Date	Class	Expected Rtr	Rtr Date	Mod/Duty/Dt	Department	Injury	Status	Days	R	C
08/03/2023	LT				PLANT	disagreement	Per		<input type="checkbox"/>	<input type="checkbox"/>
01/03/2023	IHC				PLANT	LT ELBOW CONTUSION	Per		<input type="checkbox"/>	<input type="checkbox"/>

**Disability Management:** 3 claims have been recorded

First Day Off	Type	Expected Rtr	Rtr Date	Mod/Duty/Dt	Department	Description	Days	R	C
06/03/2023	DR	27/03/2023			PLANT	Handle Hardware	15.00	<input type="checkbox"/>	<input type="checkbox"/>
10/05/2018	Str	14/05/2018	14/05/2018	Yes	PLANT	THUMB LT STRAIN	2.00	<input type="checkbox"/>	<input type="checkbox"/>

**Work Accommodation:** Last 5 recorded programs showing

Start Date	Occ?	Est. Stop	Est. Term	Completion	Act. Term	Department	Result	R	C
22/03/2023	Yes	21/04/2023	4 Weeks			PLANT		<input type="checkbox"/>	<input type="checkbox"/>
08/03/2023						PLANT		<input type="checkbox"/>	<input type="checkbox"/>

**Attendance:** Last 25 time records showing

Date	Day	Department	Type	Hours	Cont	R	C
13/04/2023	Thu	PLANT	Sick with pay	1:00		<input type="checkbox"/>	<input type="checkbox"/>
27/10/2022	Thu	PLANT	Sick with pay	4:00		<input type="checkbox"/>	<input type="checkbox"/>
05/09/2022	Mon	PLANT	Sick with pay	1:00		<input type="checkbox"/>	<input type="checkbox"/>
05/09/2022	Mon	PLANT	Vacation covered	1:00		<input type="checkbox"/>	<input type="checkbox"/>

**f) Date of Last Health Center Visit:** 08/03/2023

**g) Access Personal Data record:** ☐

**End Date of Last Case:** 25/02/2019

## Time Markers

The **Time Markers** panel provides the user with the ability of track time related to various aspects of an incident. The **Wait Time** fields capture the number of days passed waiting for requested information of documents. The calculated days do not include weekends. The **Time Log** fields capture the number of hours spent on noteworthy activities and meeting related to the incident. The **System Time** is time spent in this record as recorded by the system. **Descriptions** may be manually typed or selected from a table. An export is available on the **Incident** dropdown on the main menu of Incident Reporting.

**CTMS Time Markers**

**a) Wait Time:**

Staff	From Date	To Date	Wait Days	Description	R	C
1 SARA	06/03/2023	09/03/2023	4.00	Medical Documentation	<input type="checkbox"/>	<input type="checkbox"/>
2					<input type="checkbox"/>	<input type="checkbox"/>
3					<input type="checkbox"/>	<input type="checkbox"/>
4					<input type="checkbox"/>	<input type="checkbox"/>
5					<input type="checkbox"/>	<input type="checkbox"/>
6					<input type="checkbox"/>	<input type="checkbox"/>

**b) Time Log:**

Staff	Date	Hours Spent	Description	R	C
1 SARA	09/03/2023	45	Initial Record Entry	<input type="checkbox"/>	<input type="checkbox"/>
2				<input type="checkbox"/>	<input type="checkbox"/>
3				<input type="checkbox"/>	<input type="checkbox"/>
4				<input type="checkbox"/>	<input type="checkbox"/>
5				<input type="checkbox"/>	<input type="checkbox"/>
6				<input type="checkbox"/>	<input type="checkbox"/>

**c) System Time:**

Date	Time Spent	User
04/08/2023 12:47	6:05	SARA
04/08/2023 12:43	0:05	SARA
04/08/2023 12:40	0:03	SARA
04/08/2023 10:20	2:17	SARA
04/08/2023 10:17	0:03	SARA
04/08/2023 9:32	0:10	SARA
07/07/2023 14:05	0:02	SARA

**Wait Time:** days passed waiting for pertinent information... **Wait Days:** calculated by the system, does not include weekends... **Time Log:** hours spent on noteworthy activities... **System Time:** time spent in this record as recorded by system... **Descriptions:** may be typed or selected from a table... Please note that the same table is used by all modules... To remove a line: Clear all fields except staff, next time, line will be removed... An export is available on the menu.



# Review Dates Worksheet

The **Review Dates Worksheet** provides immediate access to the currently signed in user's review dates in this specific module.

	Date	Overdue Name	Activity	Done	View Record	Re-Assign
1	15/02/2017	<input checked="" type="checkbox"/> ANDERSON, JENNIFER	Letter StartID 02 Jan 17, Forms Received	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	17/02/2017	<input checked="" type="checkbox"/> ANDERSON, JENNIFER	Letter StartID 01 Feb 17, Forms Received	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	18/02/2017	<input checked="" type="checkbox"/> AFFRAID, BERT	One Month Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	03/03/2017	<input checked="" type="checkbox"/> ANDERSON, JENNIFER	One Month Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	05/04/2017	<input checked="" type="checkbox"/> AARON, PETER	Three Month Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	19/04/2017	<input checked="" type="checkbox"/> AFFRAID, BERT	Three Month Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	02/05/2017	<input checked="" type="checkbox"/> ANDERSON, JENNIFER	Three Month Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The view from the module **Menu** panel are your review dates for all employees from this module which are overdue for up to three months prior. Alternative views are listed on the right side of the panel along with fields to enter specific date parameters or specific due dates.

The **Done** check box will auto-fill a review date, stamping it with today's date and the User ID of the user currently logged into the system.

The **View** check box will open a subsequent panel which allows the user to enter text related to the **Action** taken related to the activity, and enter a **Completion Date** for the Action. Do NOT click on the Done check box here, the system will auto-fill.

The **Get Record** check box will open the record associated with the review for the user to add, review or revise information on the panels specific to the record.

The **Reassign** check box, in conjunction with the **Assign F9** or the **Reassign All F14**, will allow the user to assign the review dates to another user one-by-one or on masse.

See the **A6Z Review Dates** report for an alternative method to access review dates for one or more users. The A6Z Review Date report may be accessed from the sidebar or from the **Reports** dropdown menu.

# Entry of a Recurrence

Recurrences of claims are recorded via the **Record Description** panel. By clicking on the **Had Recurrence** check box at the bottom-centre of the screen, the **F6 See Reo's** button is activated. Click on the **F6 See Reo's** and document the recurrence by entering the **First Day Off** and any **Comments** related to the absence. Once the worker returns, come back to this screen and enter the **Date Returned**.

**CA41 Record Description**

☒ a) Short Term  
☐ Long Term  
☐ Mid Term

☐ Was an occupational claim

b) Date of Accident or Sickness: 05/03/2023  
 First Day Off: 06/03/2023  
 Reference: 23-159-01  
 Insurance Co.: Sick Ben 15 Wks  
 Medical Review Date: 02/06/2023  
 Expected Return: 27/03/2023  
 t) Date Returned: 27/03/2023

Case Closure Outcome: Modified Duties  
 Comments: [Text Area]  
 Date: 27/03/2023

Guideline expected RTW: 05/04/2023  
 Position: ASSOCIATE  
 Union: UNION A

d) Managing Staff: SARA  
☐ Closed  
☐ Inactive

f) Reason: Injury  
 Nature: It ankle fracture  
 More Info: fell off ladder

Department: PLANT  
 Supervisor: Brad Grantham

g) Notes: [Text Area]

☒ n) Modified Duties  
 MDut Start: 27/03/2023  
 MDut Stop: 21/04/2023  
 Limitation: 4 Weeks

☒ k) Had a Recurrence  
**F6 See Reo's**

Entered: SARA 09/03/2023  
 SF7 Cancel Record

**CA51 Recurrence Dates**

	First Day Off	Date Returned	Comments
1	06/03/2023	27/03/2023	Original Absence
2	24/04/2023		1st REO - surgery required on It ankle
3			



# Entry of Days Lost & Costs

Days lost can be entered quickly via the main menu. Entering via the main menu under **Manage Claims/Enter Days** allows the user to enter days lost for a particular month for several claims at once. Follow the screen instructions to apply days lost.

CA57 Enter Days Off PKD-Company 002

Surname	ADAMS	Claim Number	23-159-01
Given Name	GREG	Date of Incident	05 Mar 23
Department	PLANT	First Day Off	06 Mar 23
Employee Id	359	Expected Return	27 Mar 23
Employee Key	159	Date Returned	27 Mar 23
		Claim Status	
		Claim Total (Days)	15

Month: May 23

Total Days for Month:

Costs can also be entered quickly via the main menu. Entering via the main menu under **Manage Claims/Enter Costs** allows the user to enter costs for a particular month. Follow the screen instructions to apply costs.

CAC58 Enter Costs 31 May 2023 Invoice No.

Surname	ADAMS	Employee Id	359	Ref Number	23-159-01	Expected RTW	27 Mar 23
Given Name	GREG	Employee Key	159	Date of Incident	05 Mar 23	Date Returned	27 Mar 23
Department	PLANT			First Day Off	06 Mar 23		

Cost Type  F6 Service Date  Payee  F7 Amount  Prov. Tax

Next Cost F1

Totals	BENEFITS	REPLACEMENT	MEDICAL COST	FORMS	LEGAL
This Month	650.00	650.00			
This Year	650.00	650.00	50.00		
Claim Total	650.00	650.00	50.00		

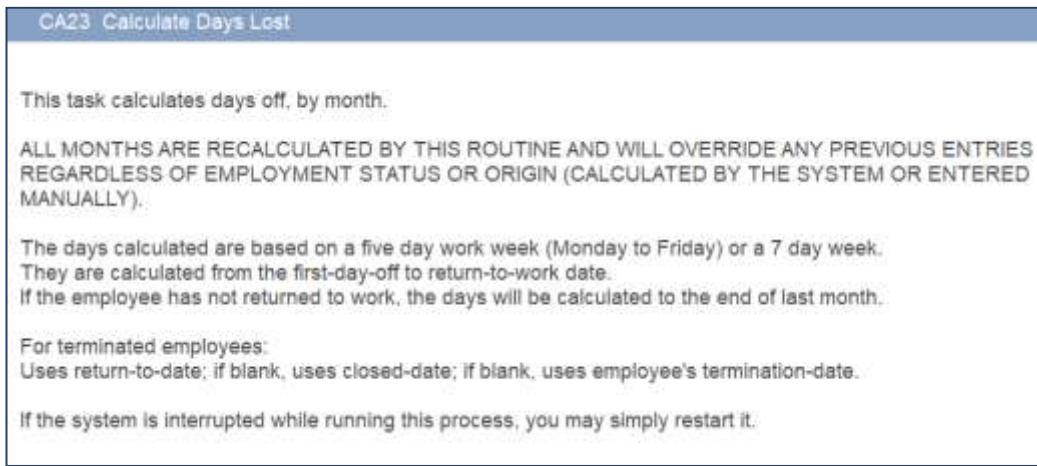
Amounts entered will not be posted to the system until all costs for the claim have been entered.

Exit F12

Exit F12

# Auto Calc(ulation) of Days Off

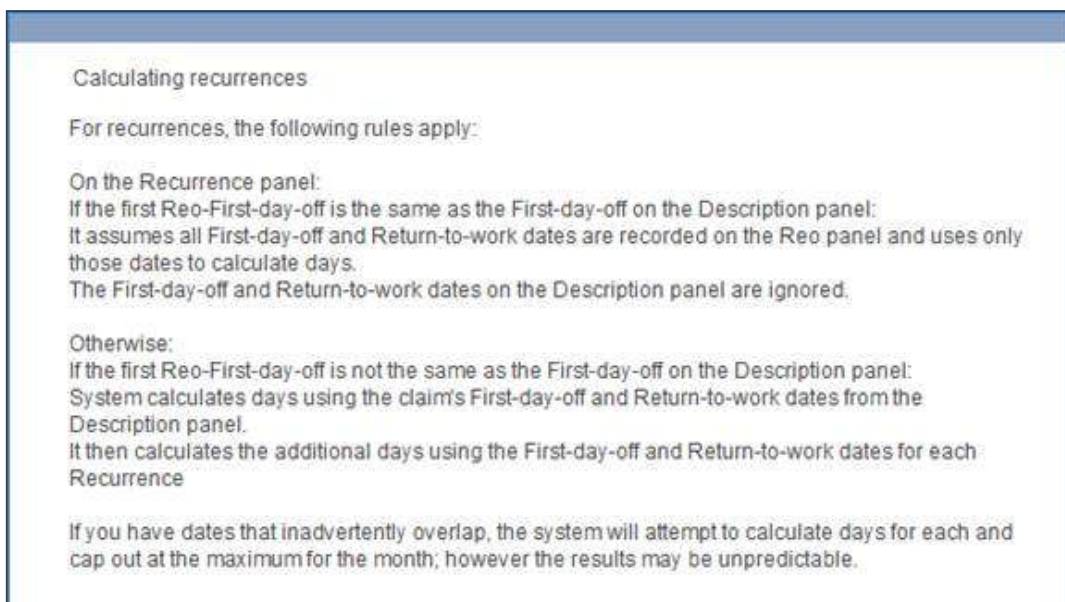
Instead of manually entering days lost, you may choose to allow the program to quickly and automatically calculate the days lost for each record. At the main menu, click on **Manage Claims** then **Auto Calc of Days Off** and a message panel will provide instructions for completing the task.



Your options for completing the auto calculation of days lost are:

- Include OR Exclude REO's
- Calculate Days based on 5 day week OR Calculate Days based on 7 day week
- Calculate days for this company OR Calculate days for all companies

When selecting the option to include recurrences you will be presented with a message panel which provides the rules that apply to the calculation.



# Reports Available In Disability Management

## Manage Claims

### New/Open Claim

TM3	General Comments
C39	Cost Details
A72	Claim Details
TMB	Audit
A49	Claims added from external source
AW6	External Source Exceptions

### Review Date Work Sheet

### Exports

A2G	Claims, Select/w Favourites
A21	Claims
A18	Attributes
A19	Appointments
AC04	Costs
TM9	Time Markers
AJ1	Claims, Incidents, Wk Acc.
A6B	Comments

## Reports

A6F	Who's Off
A61**	Register
A6G	Age of claims
A62	Return to Work
A95	List of Claims
A6D	Open or Closed Claims
A68	Modified Work
A9Z	Review Dates
A69	Missing Fields
A9B	List of Appointments
A73	Average Days Lost
A84	Totals by Group/Dept
A85	Non-Occupational Absences
A8T	Activity based on Comments

## Costs

A6S	Employee Details
A65	Department Details
A66	Department, Group Summary
A6E	Details By Group or Dept
A6J	Days, Costs By Month
A6P	Claim Costs By Employee

A6T Claim Costs By Reference

A6U Financial Report

## Statistics

A81	Selected Claims
A82	By Reason
A83	Days or Costs
A88	By Month
A89	Days, Costs By Month
A63	Detail Savings
A87	Calendar

## Attributes

A91	Attributes Statistics (14)
A92	Totals By Month (1)
A93	List By Employee w/Name (15)
A94	List By Employee wo/Name (20)
A9F	Totals By Attribute (100 or All)
A9K	Totals This Month, YTD (100)

## Graphs

AHR	Disability Dashboard – 4 yr
Year to date	
AHA	YTD Claims by Type
AHB	YTD Claims by Reason
AHC	YTD Claims Types & Reason
Days and Costs	
AHD	Days Lost Analysis
AHE	Costs Analysis
AHF	Actual Days Lost & Cost Reports
AHM	Costs and Days Trend
Claims Management	
AHN	Who's Off
AHP	Claim Report

## Statistics

AHG	Claim Reason and Attributes
AHH	Claim Stats by Reason
AHI	Claim Stats by Medical Profile
AHJ	Claim Stats by Condition
AHK	Attributes Report
AHL	Claim Trend
AHQ	Claim Statistics and Averages

**Options**

TB9	Action Emails with Email Addresses
A31	Description Tables
A3A	Table Counts
TM7	List of Time Markers
TC1	List of Attribute Categories
C01	List of Detailed Cost Types
AMD	Audit Report
AMC	Audit Export
AME	Audit Inactivity
A3K	Temporary Staff Reassignments

\*\* Option to Create Export File in Addition to Report.

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