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# **Work Accommodation Module**

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User Guide – V 12.0

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December 23, 2024

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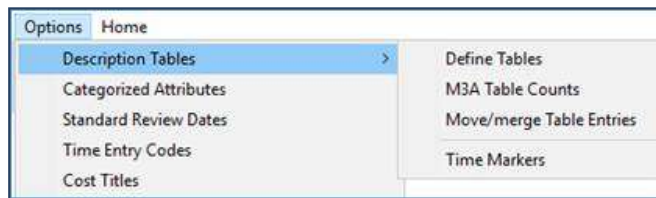
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# Options

**Work Accommodation** will record modified work programs or waiting placement programs. Before it can capture specific information related to a program, there are several tables that need to be built.



## 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.

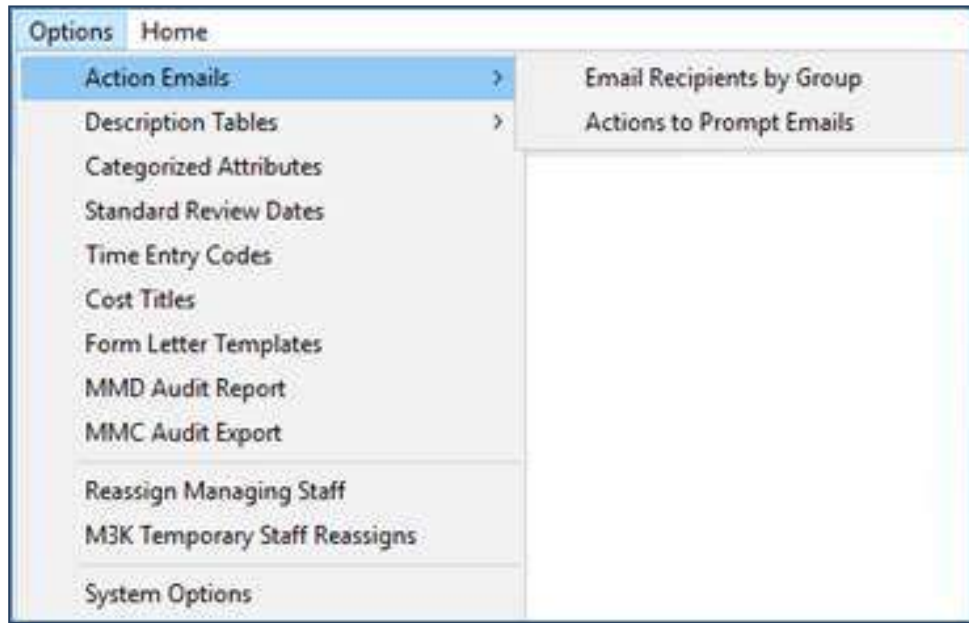
SMTP Password (enter TWICE):  Complete only if the authentication method chosen requires it.

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

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

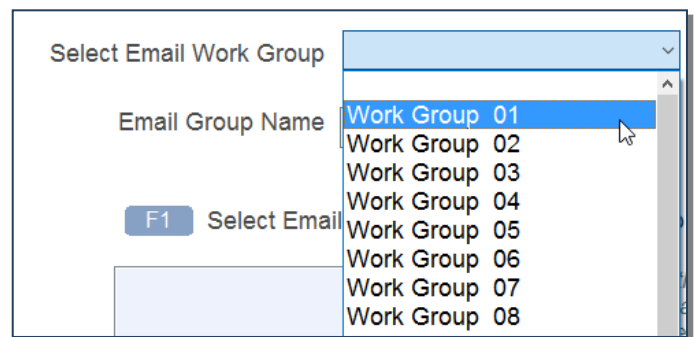
☐ Do not use Display Name (recommended for Office 365 only)

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.

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.

CM53 Action Emails

Make sure the email protocol has been setup under Maintenance

F5 Print

Check the Actions that should prompt an email notice	Action By	Email To
<input checked="" type="checkbox"/> Added Modified Work Program	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input checked="" type="checkbox"/> Added Waiting Placement Program	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Waiting Placement changed to Modified Work	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Modified Work changed to Waiting Placement	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Program Actual Completion Date entered	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Program Start Date changed	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Program Phase changed	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Added new General Comment	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Added new Confidential Comment	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

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.

CM #13

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).

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



## Description Tables

### Define Tables

The client must define Restrictions, Work Assignments, Term of Program, Results of Program, Body Part, Type of Appointment, Program Effectiveness and Placement Priority. From the tool bar, click **Options**, **Description Tables**, **Define Tables** and select the table heading to be defined.

Enter the Table number and press Enter. Then enter the Description name. Press Exit-F12 when additions or revisions are completed.

CM31 Table Entries

Table no.

Description   
 Maximum number of characters allowed is 45

Go to:

- ☐ F1 Restrictions
- ☐ F2 Work Assignment
- ☐ F3 Term of Program
- ☐ F4 Result of Program
- ☐ F5 Body Part
- ☐ F6 Type of Appointment
- ☐ F7 Program Effectiveness
- ☐ F8 Placement Priority

☐ Tables are shown in pop-ups in alphabetical order.  
 Click here to show table in same sequence as entered.

Never change the description of a table entry once it has been used.

Restrictions

1. NO LIFTING > 5lbs
2. NO LIFTING > 10lbs.
3. NO LIFTING > 20lbs.
4. NO LIFTING > 40lbs.
5. NO LIFTING > 30lbs.
6. NO USE OF EXTREMITY
7. WAITING PERM PLACEMENT
8. MINIMAL USE OF EXTREMITY
9. SEATED JOB WITH MIN WALKING
10. NO REPETITIVE CLIMBING
11. NO KNEELING/SQUATTING
12. NO REP KNEELING/SQUATTING
13. NO REP MOTION/STRESS TO EXTREM
14. PERM RESTRICTIONS
15. NO PULLING OR PUSHING > 20 lbs
16. NO REP PUSHING OR PULLING
17. NO CONTINUOUS BENDING/TWISTING
18. NO OVERTIME
19. SEE COMMENTS FOR SPEC RESTRIC
20. SEE DOC LINK FOR SCANNED NOTE
21. NURSING ASSIGNMENTS
22. No lifting w/o assist dev
23. No Floating to Alter Unit

Exit F12

Do not type over an existing descriptor as the change will affect previously entered program data.



## Move/Merge Table Entries

Tagged entries may be moved or merged within a table. Run the M3A 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 Work Accommodation before using this procedure.

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

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

It is recommended that once the move is complete, rerun the M3A 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 Work Accommodation, 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.

The screenshot shows the 'CTM7 Define Time Marker Descriptions' window. On the left, there is a 'Table no.' field with a dropdown menu and a 'Description' text box. Below these are two buttons: 'Go to F1 Wait Times' and 'Go to F2 Notable Activities'. On the right, there is a list titled 'Wait Times' containing a numbered list of activities: 1. Medical Documentation, 2. Initial Ctm Decision, 3. Supervisor's WA Plan Implementation, 4. Response to letter, 5., 6., 7., 8., 9., 10., 11., and 12. An 'SFS Print' icon is located in the top right corner.

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

The screenshot shows the 'CTM7 Define Time Marker Descriptions' window after switching to the 'Notables' table. The 'Table no.' field now shows '6'. The 'Description' text box contains the text 'Update of Plan'. The 'Go to F1 Wait Times' button is now disabled, and the 'Go to F2 Notable Activities' button is active. The list on the right, titled 'Notables', contains a numbered list of activities: 1. Initial Record Entry, 2. Phone Call with EE, 3. Phone Call with WSIB, 4. Phone Call with Colleague, 5. Meeting with EE, 6. Update of Plan (which is highlighted in blue), 7., 8., 9., 10., 11., 12., 13., 14., 15., 16., 17., 18., 19., 20., 21., 22., and 23. An 'SFS Print' icon is in the top right corner. At the bottom right, there is an 'Exit F12' button. A note at the bottom left states: 'Never change the description of a table entry once it has been used. The results could be irrecoverable.'

## 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 Work Accommodation, click **Options/Categorize Attributes**.

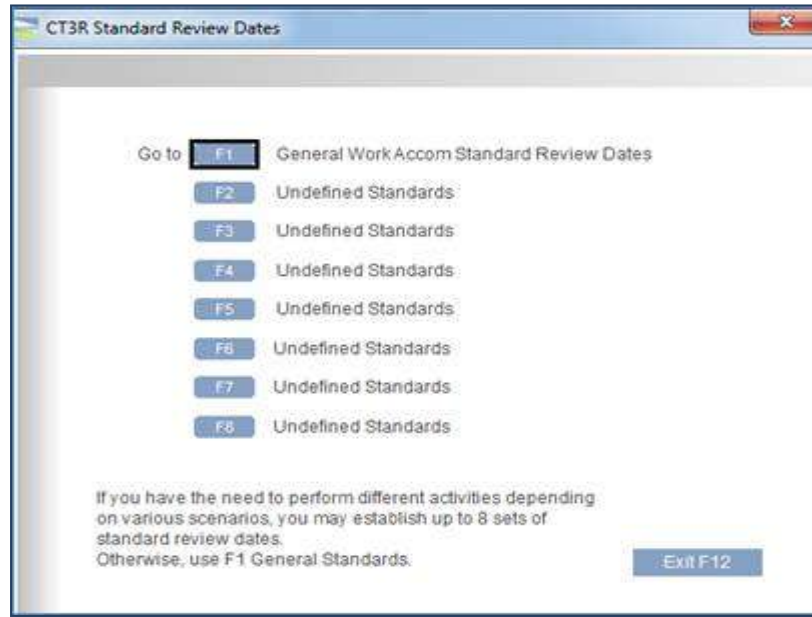
Using the arrow, select the next available category (initially the drop down list will show Category1, Category 2, etc.) and then type in the **Category Name** which you wish to use for your selection of attributes.

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

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.

CT3S Standard Review Dates

Description

	Interval; Default is days	Check if interval is months	Task, Activity
1	<b>3</b>	<input type="checkbox"/>	QUICK CHECK WITH EE
2	7	<input type="checkbox"/>	1 WK REVIEW
3	14	<input type="checkbox"/>	2 WK REVIEW
4	21	<input type="checkbox"/>	3 WK REVIEW
5	30	<input type="checkbox"/>	SEND A BEN PACKAGE IF STILL ON MOD DUTIES
6	60	<input type="checkbox"/>	15 weeks
7		<input type="checkbox"/>	

## Time Entry Codes

In order to use the **Time Entry Calendar** panel of a Work Accommodation program, **Time Entry Codes** must be defined. Click on **Options, Time Entry Codes**. Click on the first available field and enter a Time Description. Press Tab and enter a 5 character Abbreviation. Press Tab and enter an additional 2 character Abbreviation. Two abbreviations are required due to spacing restrictions on various reports. Select a Type to indicate whether the employee is working or off under this Time Code.

	Time Description	Abbreviations		Type
1	Phase 1	Phas1	P1	Work
2	Phase 2	Phas2	P2	Work
3	Phase 3	Phas3	P3	Work
4	Phase 4	Phas4	P4	Work

## Cost Titles

To track costs related to a program the client may define **Cost Titles**. Click on **Options, Cost Titles**, enter a Title, press Tab and enter an Abbreviation for up to 5 cost categories (2 through 6). The first category is hardcoded within the system and is reserved for Work Site Modification costs. Entering a "Y" in the Exclude field will exclude costs from totals on reports.

	Title	Abbreviation	Y=Exclude cost from reports
1	Work Site	Site	
2	MOD IN COUNT	MIC	
3	MOD EXTRA	EXT	
4	MEDICAL COST	MED	
5	WSIB PD WPHC	W WPHC	
6	OTHER COSTS	MISC	

## Form Letter Templates

**Form Letters** can be used to send notices or letters to your employees. To create up to 50 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.



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

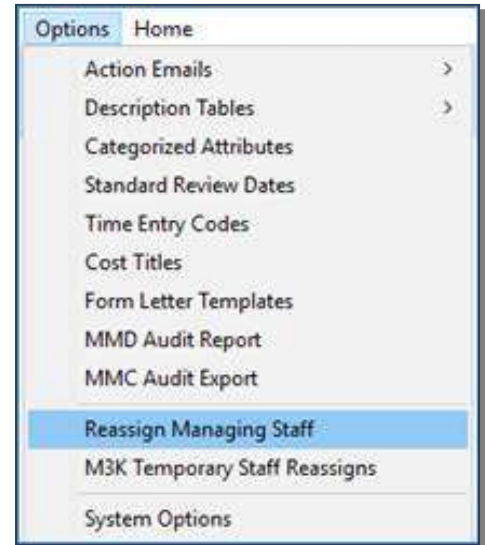
Select a template from the list.

- 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.

## 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**.

A screenshot of a dialog box titled 'Managing Staff'. The main heading is 'CT3L Change Managing Staff'. Below it, the instruction 'Indicate which procedure to perform:' is followed by three radio button options. The second option, '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.', is selected. Below these options are two columns of input fields. The 'From:' column has two entries: 'KFERRELL' and 'KAREN - CLMS MGR'. The 'To:' column has two entries: 'SARA' and 'SARA K'. Below the input fields are two checked checkboxes: 'Change Managing Staff on open records' and 'Change Managing Staff on outstanding review dates'. At the bottom, there is a note 'Changes will be recorded in Audit' and two buttons: 'Continue F5' and '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

Work Accommodation

Records Reassigned from KFERRELL to SARA

Temporarily Assign

Page 0001 M3L

Date 30 Mar 17

Time 12:24

Employee

Managing Staff

BLACK, SARA 292 F/t

ANDERSON, ROBER 3115

Start

PKD-Company 1

Work Accommodation

Records Reassigned from KFERRELL to SARA

Temporarily Assign

Page 0002 M3L

Date 30 Mar 17

Time 12:24

Employee	Start Date	Date	To Be Done	Key
<b>Review Dates</b>				
ROBITAILLE, BETTY 383 F/t	23 Nov 15	23 Dec 15	SEND A BEN PACKAGE IF STILL ON MOD DUTIES	83
BOYNTON, NORMA 146 F/t	25 Jan 16	29 Feb 16	SEND A BEN PACKAGE IF STILL ON MOD DUTIES	46
ANDERSON, ROBER 3115 pF/t	23 May 16	30 Jun 16	call ee re....	115
ANDERSON, JENNI 2160 F/t	06 Feb 17	20 Feb 17	2 WK REVIEW	160

## System Options

The Managing Staff field can be setup to auto-enter the User's ID entering the record or to provide a warning message when the field is not completed before exiting the Description panel of the record.

System Options

☐ System to auto-enter user's ID into Managing Staff
 ☐ Managing Staff is mandatory


 Managing Staff is mandatory.  
Please complete.

OK

# Enter a Work Accommodation Program

As each new work accommodation program is planned, enter it into the system by accessing the various panels available on the Sidebar menu.

To enter a program, click on **Add New Program** on the Sidebar menu. Select the employee who is starting a program.

The Program directory is visible on the Sidebar menu.

## Program Description

The **Program Description** panel of the program will appear.

The system will default to a modified work program. Alternately you may select Waiting Placement for a job. This initial selection determines which Program Description panel will appear.

Once you have made your selection, Modified Work or Waiting Placement, continue by completing all of the appropriate fields on the Program Description panel.

Turning on the Modified Work radio button will present this panel:

**CM41 Program Description**

☒ Modified Work    ☐ Waiting Placement

☒ Occupational F8 View incident

☐ Non-occupational  
☐ Nil

a) Program Start Date 01/05/2023

Classification Lost Time

Injury/Illness Date 08/08/2018

Department WAREHOUSE F2

Warehouse

Reference / Claim No. 38080801

Medical Review Date 17/05/2023 In Review Dates

b) Managing Staff SARA F7

Projected Completion 23/06/2023

Expected Duration Weeks 8

Term of Program TEMP OCC F4

d) Actual Completion

Actual Duration

Result  F6

f) Comments

Date Entered: 27/04/2023    SARA

SF7 Cancel Record

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

PrvPg C-Q NxtPg C-W Index C-F12 Next Esc Home F11 Menu F12

- 01 Program Description
- 02 Medical Condition
- 03 Program Phases
- 04 Attributes
- 05 General Comments
- 06 Confidential Commen
- 07 Site Modifications
- 08 Time Entry Calendar
- 09 Cost Summary
- 10 Review Dates
- 11 Appointments
- 12 Form Letters
- 13 Key Notes
- 14 Document Folder
- 15 Document Links
- 16 Guideline Worksheet
- 17 M61 Program Detail
- 18 User Notes & Email
- 19 Demographics
- 20 In a Nutshell
- 21 Time Markers
- 22 TMB Audit

Turning on the Waiting Placement radio button will present this panel:

## Medical Condition

01 Program Description

02 Medical Condition

03 Program Phases

04 Attributes

05 General Comments

06 Confidential Comments

07 Site Modifications

08 Time Entry Calendar

09 Cost Summary

10 Review Dates

11 Appointments

12 Form Letters

Select the next panel **Medical Condition**. Enter a text description of the **Condition**.

Click on the **Body Part** field check box and make the appropriate selection(s) from the table provided. Up to 12 selections may be made.

## Program Phases

Referring to the Sidebar menu, select the next panel **Program Phases**. Here you will begin to identify each individual segment of the employee's program. Initially complete the appropriate fields for the planned program.

**CM44 Program Phases**

F5 Worker Form    SF5 Report    SF7 Remove Phase

a) Scheduled Start Date: 01/05/2023    Actual Start Date:

Scheduled Stop Date: 12/05/2023    Actual Stop Date:

b) Effectiveness:  F1

Modified Duties: ☒ Yes

Modified Schedule: ☒ Yes

Daily Work Hours: 2:00 From 7:00 To 9:00

Department: WAREHOUSE F2 Warehouse

d) Comments

PH 1 comments field

Date Entered: 27/04/2023 SARA

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

PrvPg C-Q    NxtPg C-W    Index C-F12    Next Esc    Home F11    Menu F12

Phase 1 of 4

F4 Restrictions

F6 Assignments

F3 Add Phase

SF3 Add / Copy Phase  
Copying the restrictions and work assignments from the phase currently showing.

Click on **Restrictions** and then click on the appropriate check box to select a restriction.

**CM51 Restrictions**

a) Restrictions

NO OVERTIME ☐

Temporary / Permanent: Temporary

b) Comments

(1950 characters)

To select, click or use spacebar on check box.

Close F12

**CM32 Restrictions**

1. NO LIFTING > 5lbs
2. NO LIFTING > 10lbs
3. NO LIFTING > 20lbs
4. NO LIFTING > 40lbs
5. NO LIFTING > 30lbs
6. NO USE OF EXTREMITY
7. WAITING PERM PLACEMENT
8. MINIMAL USE OF EXTREMITY
9. SEATED JOB WITH MIN WALKING
10. NO REPETITIVE CLIMBING
11. NO KNEELING/SQUATTING
12. NO REP KNEELING/SQUATTING
13. NO REP MOTION/STRESS TO EXTREM
14. PERM RESTRICTIONS
15. NO PULLING OR PUSHING > 20 lbs
16. NO REP PUSHING OR PULLING
17. NO CONTINUOUS BENDING/TWISTING
18. NO OVERTIME
19. SEE COMMENTS FOR SPEC RESTRIC
20. SEE DOC LINK FOR SCANNED NOTE
21. NURSING ASSIGNMENTS
22. No lifting w/o assist dev
23. No Floating to Alter Unit
24. Assigned as an Extra
25. No CPR
26. Only Nursing Stn Duties
27. HOURS OF WORK
28. EXEMPT FROM USE OF FORCE

Remove F7    Close F12

Indicate whether the restriction is **Temporary** or **Permanent**.

Continue by clicking on **Assignments** and then click on the appropriate check box to select an assignment.

Indicate whether the assignment is **Temporary** or **Permanent**.

Click **Close F12** to return to the **Program Phases** panel.

Multiple phases can be entered for a program.

Close F12

## Attributes

- 01 Program Description
- 02 Medical Condition
- 03 Program Phases
- 04 Attributes
- 05 General Comments
- 06 Confidential Comment
- 07 Site Modifications
- 08 Time Entry Calendar
- 09 Cost Summary
- 10 Review Dates
- 11 Appointments
- 12 Form Letters

The **Attribute** panel allows the user to tag appropriate descriptions related to the program. Access the Sidebar menu to select the **Attribute** panel. Make the selection(s) of Category from the choices in the left column and select an attribute(s) from the Category. The selected attributes will appear in the right hand column. A maximum of 35 attributes may be selected.

If an attribute is selected in error, double click on the selected error. The system will ask if the attribute should be deleted. Indicate Yes and the attribute will disappear from the list of tagged descriptions.

CTC2 Attributes
Maximum 35
Selected 5

a) Select Category, then click on >>

Body Parts  
 Injury/Cond  
 Age Group  
 Occ Exp on Job  
 Type of Prgm

F2  
>>

b) Select Attribute, then click on >>

Abdomen  
 Ankle LT  
 Ankle RT  
 Arm Lower LT  
 Arm Lower RT  
 Arm Upper LT  
 Arm Upper RT  
 Back (Lower)  
 Back (Upper)  
 Chest  
 Ear  
 Elbow LT  
 Elbow RT  
 Eye  
 Face  
 Finger(s) LT  
 Finger(s) RT  
 Foot LT  
 Foot RT  
 Hand LT  
 Hand RT  
 Head  
 Hip LT  
 Hip RT

F5  
>>

d) Attributes Selected

Head  
 Bruise/Contusion  
 40-49 Yrs Old  
 20 or More Yrs on Job  
 Temporary WA Prgm

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

## General Comments

Referring to the Sidebar menu select the next panel **General Comments**. Comments may be documented on this panel. Today's date will auto-fill the Date field upon accessing this panel. The date may be changed if necessary. This is the ideal location in a program record to do your detailed documentation. This panel will assist in the elimination of a paper program file.

The screenshot displays the 'CTM1 General Comments' window. At the top, it shows 'Modified Work' and 'Start Date: 01 May 23 Injury/Illness: 08 Aug 18'. Below this, there are fields for 'Date' (27/04/2023), 'Entered' (SARA, 27/04/2023, 14:38), 'Changed' (SARA, 14/08/2023, 13:35), and 'First & Last Comment Dates' (08/08/2018, 27/04/2023). A 'No. of Comments' field shows '12'. A note states 'This session's additions are not included in the counts and dates.' The main text area, titled 'General', contains the text 'ken called today to report a fall in which he hit his head'. To the right of the text area are navigation buttons: '< >' for '< Page Up' and '> Page Down', 'First Pg F6', and 'Last Pg F7'. At the bottom, there are several function key buttons: 'PvPg C-Q', 'NxtPg C-W', 'Index C-F12', 'Next Esc', 'Home F11', and 'Menu F12'. A status bar at the very bottom provides instructions: '[Ctrl Return] Go to any panel;' and '[Ctrl a, etc] Move cursor to field labeled a] etc;'. A character count '(2500 characters)' is visible in the bottom right corner of the text area.

When opening an existing program and accessing the **General Comments** panel, it will appear that no **Comments** exist. Press the arrow buttons to see any previously entered **Comments**.

**Comments** may be secured to disallow future changes.



## Confidential Comments

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

CTM2 Confidential Comments

F2: Add Record

Wait Placement Start Date: 10 Jan 22 Injury/Illness: 28 Nov 21

Date

17/12/2024

Entered

KJF

17/12/2024

14:27

Changed

No. of Comments

Date of First & Last Comments

This session's comments are not included in the counts and dates.

Confidential

(2500 characters)

< >

< Page Up

> Page Down



## Site modifications

Referring to the Sidebar menu, select the next panel **Site Modifications**. If, during the course of the program, there are any modifications undertaken that require tracking, enter the modifications on this panel.

CM47 Site Modifications SF7 Remove Record

	Date	Department	F3 Get Department	Costs	Location	Account	Comments
1	27/04/2023	WAREHOUSE	Warehouse	650.00	ee work stn	23122	new ergo chair
2							
3							
4							
5							
6							

Total 650.00 Costs will be added to the Cost Summary panel

[Ctrl Return] Go to any panel  
[Ctrl a, etc] Move cursor to field labeled a] etc.

PrvPg C-Q
NxtPg C-W
Index C-F12
Next Esc
Home F11
Menu F12

You may enter multiple modifications by clicking on a blank line and completing the fields provided.

Any costs related to a modification will total by month and pass to the **Costs** panel.

## Time Entry Calendar

Referring to the Sidebar menu, select the next panel **Time Entry Calendar**. Click on the date box that the program is going to begin. Then click on the **Time Codes** from the table to the right of the panel. The hours will auto-fill from the **Personal Data** module. If the hours are not correct, click on the date box to highlight and then double click on the **Time** from the table on the far right of the panel.

CM46 Time Entry Calendar

May 2023

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1 Phas1 2:00	2 Phas1 2:00	3 Phas1 2:00	4 Phas1 2:00	5 Phas1 2:00	6
7	8 Phas2 4:00	9 Phas2 4:00	10 Phas2 4:00	11 Phas2 4:00	12 Phas2 4:00	13
14	15 Phas3 6:00	16 Phas3 6:00	17 Phas3 6:00	18 Phas3 6:00	19 Phas3 6:00	20
21	22 Phas4 8:00	23 Phas4 8:00	24 Phas4 8:00	25 Phas4 8:00	26 Phas4 8:00	27
28	29	30	31			

Hours Per Day 08:00 Y = More Time/Same Day

F1 View all time for one day F4 Repeat last time entry recorded

Time Codes F2

Time Codes F2	Time F3
1 Phas1	6:15
2 Phas2	6:30
3 Phas3	6:45
4 Phas4	7:00
5 Phas5	7:15
6 Phas6	7:30
7 Phas7	7:45
8 Phas8	8:00
9 Sick	8:15
10 Appt	8:30
11 Physi	8:45
12 Stat	9:00
13 Vac	9:15
14 Wait	9:30
15 EEDly	9:45
16 WCBNW	10:00
17 Late	10:15
18 InsNW	10:30
19 DFTWA	10:45
20 NotSc	11:00
21 STD	11:15
	11:30
	11:45
	12:00

On lists above: Double Click or Down Arrow and press enter

[Ctrl Return] Go to any panel.  
[Ctrl a, etc] Move cursor to field labeled a] etc.

PrvPg C-Q NxtPg C-W Index C-F12 Next Esc Home F11 Menu F12

**Repeat last time entry recorded** facilitates quick entry for days and time of the same Time Code.

If, during the course of the program, additional time entries must be noted you can click on **View all time for one day** and make those entries manually.

CM46 Time Entry Calendar

May 2023

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1 Phas1 2:00	2 Phas1 2:00	3 Phas1 2:00	4 Phas1 2:00	5 Phas1 2:00	6
7	8 Phas2 4:00	9 Phas2 4:00	10 Phas2 4:00	11 Phas2 4:00	12 Phas2 4:00	13
14	15 Phas3 6:00	16 Phas3 6:00	17 Phas3 6:00	18 Phas3 6:00	19 Phas3 6:00	20
21	22 Phas4 8:00	23 Phas4 8:00	24 Phas4 8:00	25 Phas4 8:00	26 Phas4 8:00	27
28	29	30	31			

Hours Per Day 08:00 Y = More Time/Same Day

F1 View all time for one day F4 Repeat last time entry recorded

CM46a Time Entries For 01 May 23

Code	Desc	Time
01	Phas1	2:00

Enter Time Code as shown on Calendar

Close F12

Hours on the **Calendar** panel will total by month and pass to the **Costs** panel.

## Costs

Referring to the Sidebar menu, select the next panel **Costs**. You will immediately notice that the hours have auto-filled from the **Calendar** panel, and the modification costs have auto-filled from the **Site Modification** panel.

Here you may enter costs as they relate to the **Cost Titles** that were setup under **Options**. Click on the appropriate column and month field, and enter the cost.

CM48 Cost Summary

< >

2023	Hours	Site	BEN	EXT	MED	LEGAL	MISC
January							
February							
March							
April		650.00					
May	100.0						
June							
July							
August							
September							
October							
November							
December							
Total this year	100.0	650.00					
Claim total	100.0	650.00					

\*These costs include any recorded on Site Modifications

## Review Dates

Activities or follow-ups for a program 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	17/05/2023	SARA	Medical Review	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	05/05/2023	CLAUDETTE	VERY QUICK CHECK WITH EE and advise SK	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	06/05/2023	SARA	1 WK REVIEW	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	15/05/2023	SARA	2 WK REVIEW	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	22/05/2023	SARA	3 WK REVIEW	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6	29/05/2023	SARA	4 WK REVIEW	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7	31/05/2023	SARA	SEND A BEN PACKAGE IF STILL ON MOD DUTIES	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Standard F6  
Range F6  
Date Sort F3  
To D3 F4  
Show All F7  
Overdue F8  
Archive SF4

1 = User was temporarily assigned to this activity

The **Details** checkbox will open a panel which allows the user to enter the **Action** taken for the Activity, and a **Completion Date**. Do NOT click the Done checkbox, the system will auto-fill.

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

Several reports are available related to Work Accommodation Review Dates.

CM4A Activity Details

Target Date: 17/05/2023

User: SARA (SF1)

Activity: Medical Review

Did: Completed on 21 Jun 23 by SARA ☒ Done

Completion Date: 21/06/2023

Close F12

## Appointments

Referring to the Sidebar menu, select the next panel **Appointments**. If, during the course of the program, there are any appointments or treatments where the employee lost time from the work accommodation program, they may be tracked here. Enter **Appointments** on this panel. The **Hours Off** will auto-fill based on the times entered. These **Hours Off** do not pass to the **Calendar** panel.

CM50 Appointments

SF7 Remove Record

	Date	Time	Date Returned	Time	Hours Off	Days Off	F3 Appointment Type	Reason
1	10/05/2023	9:45	10/05/2023	11:30	1:45		SPECIALIST APPOINTMENT	Reassessment
2								

## Form Letters

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.

CM55 Form Letters

a]

Aug 15, 2023

Ken Peterson  
123 Smith ST  
Toronto, ON  
M2Y 2T8

Dear Ken,

RE: Aug 08, 2018  
38080801

It has come to our attention that we are missing our RTW letter from your family doctor. We ask that you forward this clearance letter as soon as possible.

If you have any questions, or your letter has already been submitted, please call us directly at the number below.

Thank you for your prompt attention to this matter.

Regards,

Sara Kane  
Manager, RTW Programs  
519 657-3386 x 2230

Letter No. 1

Title Missing RTW Letter

Reply Due

Last Printed

SF8 Email letter to:  
s.kane@parkdanesys.com

P1 F2 P2 F3 P3 F4

## Key Notes

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

## Document Folder

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 MS 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 documents in the Document Folders.

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



## Document Links

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

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

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

In Work Accommodation, 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 document. Up to 800 documents may be linked to one employee.

Access to the **Remove** function is controlled by Security. Click **Remove** to delete link.

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	27/04/2023	x	LtrEmailed	27/04/2023	Missing RTW Letter
2	SARA	27/04/2023	x	EmailSent	27/04/2023	Message Missing RTW Letter
3	SARA	27/04/2023		EE	26/04/2023	Dr note ....
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						

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

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

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.

**CM5A Guideline Worksheet**

ICD/CSA Web:  F7

Guideline Web:  F8

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

Start Date:  SF4 Toggle Start or Injury/Illness Date

Exp. Duration:  Days F9 Calculate Expected Return

Guideline RTW:

b) Comments (1000 characters)

d) Notes (8000 characters)

A concussion, also known as a mild traumatic brain injury (mTBI), is a head injury that temporarily affects brain functioning.[9] Symptoms may include loss of consciousness; memory loss; headaches; difficulty with thinking, concentration, or balance; nausea; blurred vision; dizziness; sleep disturbances; and mood changes.[1] Any of these symptoms may begin immediately, or appear days after the injury.[1] Concussion should be suspected if a person indirectly or directly hits their head and experiences any of the symptoms of concussion.[10] Symptoms of a concussion may be delayed by 1-2 days after the accident. It is not unusual for symptoms to last 2 weeks in adults and 4 weeks in children.[11][2] Fewer than 10% of sports-related concussions among children are associated with loss of consciousness.[12]

## TMB Audit

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

PKD-Company 002

Audit

Actions on or after 15 Aug 23

Page 0001 TMB

Date 15 Aug 23

Time 09:10

Name: PETERSON, KEN

Department: WAREHOUSE, Warehouse

ID: 1111

Position: STOCKMAN

Status: Part-time

D.O.E.: 01 Jun 00

Key: 111

Date	Time	User	Action	Field	Was-Comment1	Now-Comment2
15 Aug 23	8:40	SARA	Record access			
15 Aug 23	8:59	SARA	New folder	Doc Folders		Letter to Employee

SL42 Select one option

F1 Sort by Date

F2 Sort by Fields

Sort by User

## 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

Employee is on perm restrictions

b) Enter date if these notes are to removed automatically

Entered by SARA

Date 15/08/2023

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 ABBOTT	Department PARKING GARAGE
Given Name PAULETTE	Employee Id. 0059
Address 10-521 NOTTINGHILL ROAD	Status Full-time
City, Prov.State LONDON ONTARIO	Position PARKING ATTENDANT
Country CANADA	Hire Date 30/06/2024
Postal/Zip Code N6K4L4	Union OFHCW
Home Phone 519 876-8877	Supervisor BOYNTON, NORMA
Business Phone 519 657-3386 2236	H&S CO-ORD
Cell, Foreign 519 636-9988	
Birth Date 01/02/1963	Daily Hours 8:00
Age 61	Weekly Hours 37:30
Sex Female	Work Hours 8:00 to 16:00
Marital Status Married	Miscellaneous MISC 1 FIELD
Language ENGLISH	Key 59
Business Email c.everitt@parklanesys.com	
Personal Email claudette@personalemail.com	

## 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** 2 incidents have been recorded \*C \*R

Inc. Date	Class	Expect Rtw	Rtw Date	ModDuty Dt	Department	Injury	Status	Days	a]
08/08/2018	LT	15/12/2018	01/10/2019		L&L 2010	CONCUSSION SYMPTOMS	App	298.00	<input type="checkbox"/> <input type="checkbox"/>
29/05/2012	HC				L&L 2010	BURN LT SHOULDER	App		<input type="checkbox"/> <input type="checkbox"/>

**Disability Management** 1 claim has been recorded

First Day Off	Type	Expect Rtw	Rtw Date	ModDuty&Dt	Department	Description	Days	b]
03/04/2023	Ltd	22/05/2023	21/04/2023	Yes 21/04/2023	PLANT	MVC - multiple fractures - hospitalized 231	14.00	<input type="checkbox"/> <input type="checkbox"/>

**Work Accommodation** 3 programs have been recorded

Start Date	Occ?	Est. Stop	Est. Term	Completion	Act. Term	Department	Result	d]
01/05/2023	Yes	23/06/2023	8 Weeks			WAREHOUSE		<input type="checkbox"/>
13/02/2022	Yes	18/03/2022	5 Weeks	25/03/2022	6 Weeks	BKFT RM	RTW ANOTHER POSITION	<input type="checkbox"/>

**k] Attendance** No time recorded

Date	Day	Department	Type	Hours	Cont.

f] Date of Last Health Center Visit 16/11/2012 ☐

g] Access Personal Data record ☐

## Time Markers

The **Time Markers** panel provides the user with the ability of tracking time related to various aspects of a plan. 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 plan. 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 **Reports** dropdown on the main menu of Work Accommodation.

**CTM5 Time Markers**

a) Wait Time

Staff	F2	From Date	To Date	Wait Days	Description	F3
1	SARA	27/04/2023	09/05/2023	9.00	Supervisor's WA Plan Implementation	
2						
3						
4						
5						
6						

Total Days: 9.00

b) Time Log

Staff	F4	Date	Hours Spent	Description	F5
1	SARA	27/03/2023	45	Initial Record Entry	
2					
3					
4					
5					
6					

Total Hours: 45

d) System Time

Date	Time Spent	User
14/08/2023	11:59	0:21 SARA
06/07/2023	13:20	0:01 SARA
27/04/2023	15:17	0:01 SARA
27/04/2023	14:38	0:26 SARA
27/04/2023	14:13	0:25 SARA
27/04/2023	14:04	0:06 SARA
27/04/2023	13:47	0:10 SARA

Total Hours: 5:17

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.

Assignments that are Overdue (up to 3 months)

	Date	Overdue	Name	Activity	Done	View	Record	Get	Re-Assign
1	19/07/2017	<input checked="" type="checkbox"/>	AARON, PETER	VERY QUICK CHECK WITH EE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	24/07/2017	<input checked="" type="checkbox"/>	AARON, PETER	1 WK REVIEW	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Due:

- Today F1
- This week F2
- Next week F3
- 2 weeks F4
- 3 weeks F5
- Overdue F8

Due between

and

Go F6

Due on

Go F7

ReAssign F9

Assign All SF4

Exit F12

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 **M66 Review Dates** report for an alternative method to access review dates for one or more users. The M66 Review Date report may be accessed from the sidebar or from the **Reports** dropdown menu.



# Opening an Existing Program

As each program progresses, you must open the existing program to make changes and enter any updated information.

To access an existing program click on **Manage Program/Open Program** or using the Sidebar menu click **Open Program**. Select the employee and the **List of Programs** will display for that employee in reverse chronological order. Click on the program you wish to open.

CM06 List of Programs      KEN PETERSON Part-time WAREHOUSE STOCKMAN 1111 Key 111      PKD-Company 002					
	Date	Type	Condition	Reference	Link Folder
1.	01 May 23	Program	CONCUSSION SYMPTOMS	38080801	Link Folder
2.	13 Feb 22	Program	Closed LT SHOULDER STRAIN	22-1111-23	Link Folder
3.	04 Jan 22	Program	Closed Rt wrist sprain	42040107	

The **Directory** will appear on the Sidebar menu. Choose the appropriate panel and make necessary changes or additions.

- 01 Program Description
- 02 Medical Condition
- 03 Program Phases
- 04 Attributes
- 05 General Comments
- 06 Confidential Comments
- 07 Site Modifications
- 08 Time Entry Calendar
- 09 Cost Summary
- 10 Review Dates
- 11 Appointments
- 12 Form Letters
- 13 Key Notes
- 14 Document Folder
- 15 Document Links
- 16 Guideline Worksheet
- 17 M61 Program Detail
- 18 User Notes & Email
- 19 Demographics
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- 21 Time Markers
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When an employee commences or completes either a phase or the entire work accommodation program, enter the Program Completion Date or the Actual Start/Stop Date on the program Description panel or the Program Phase panel respectively. These steps are absolutely necessary and will have a significant impact on system reports.



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