Work Accommodation Module

User Guide – V 12.0

December 23, 2024

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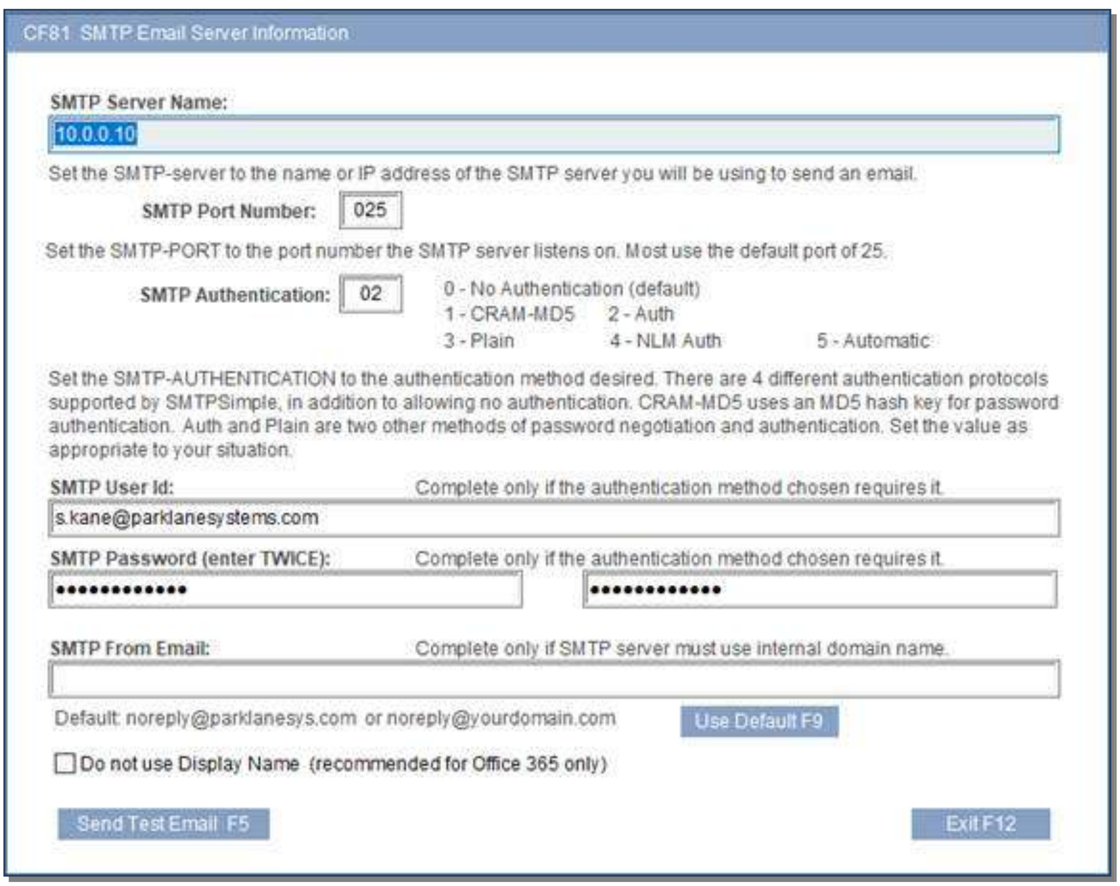
Options

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.

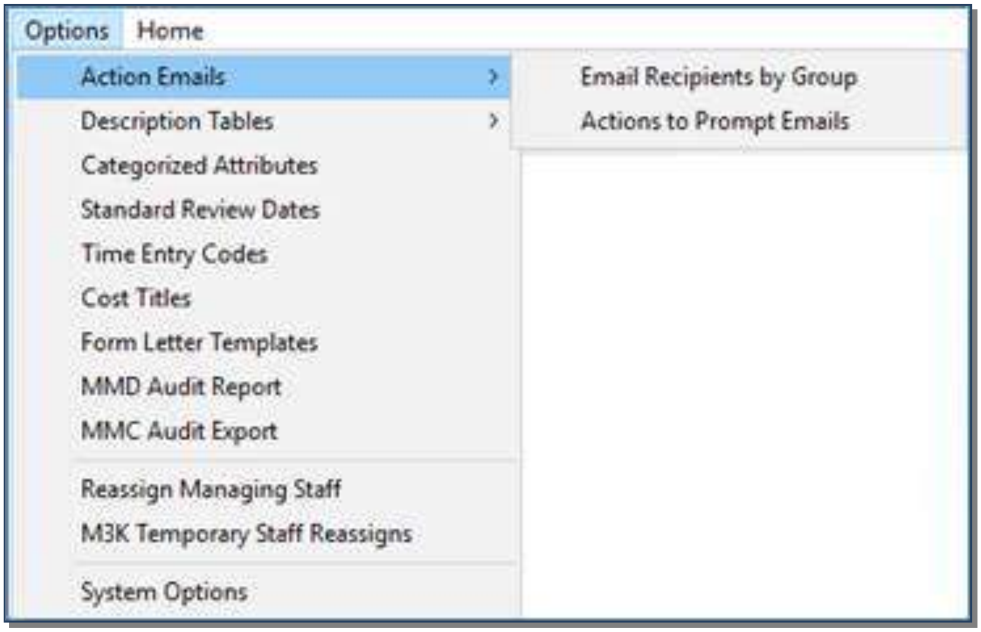
Action Emails

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**.

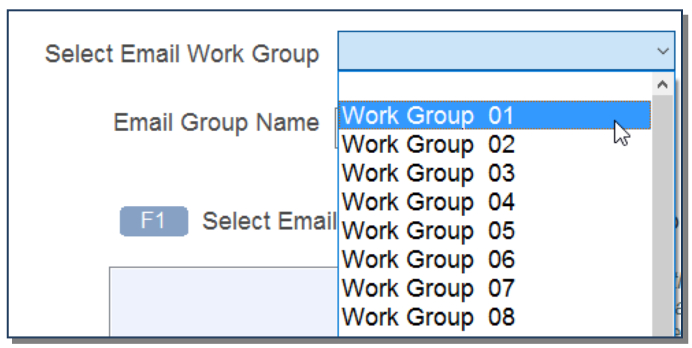


There are two options for sending Action Emails. An email will be sent to everyone that is in the email list for the specific **Action**, or an email will be sent to those who are in the same **Work Group** as the User.

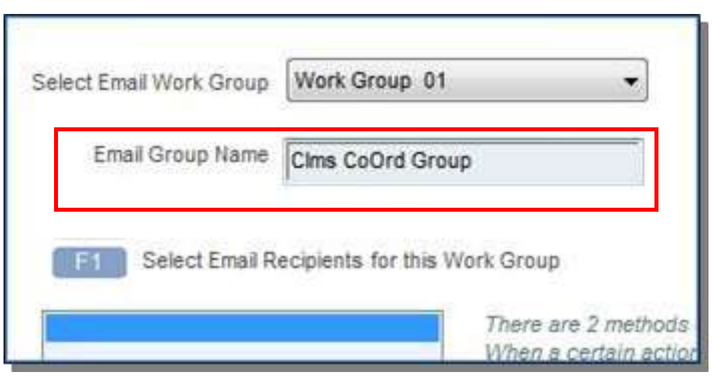


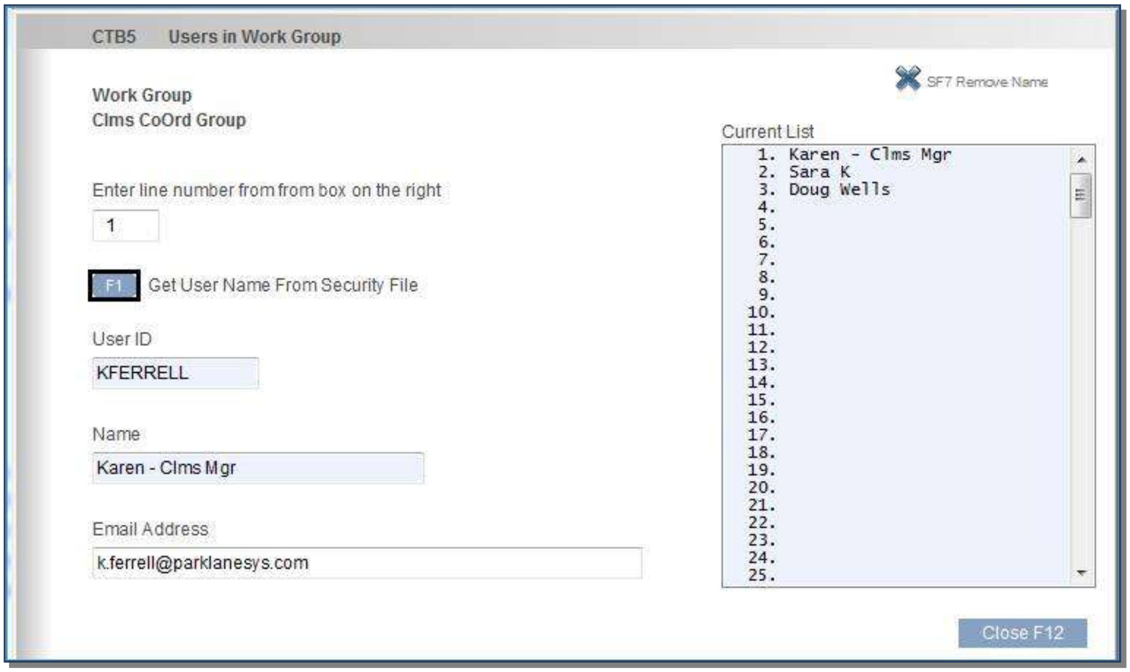
Work Groups must be pre-defined when choosing the second option. Click on **Options/Action Emails/Email Recipients by Work Group**.

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.

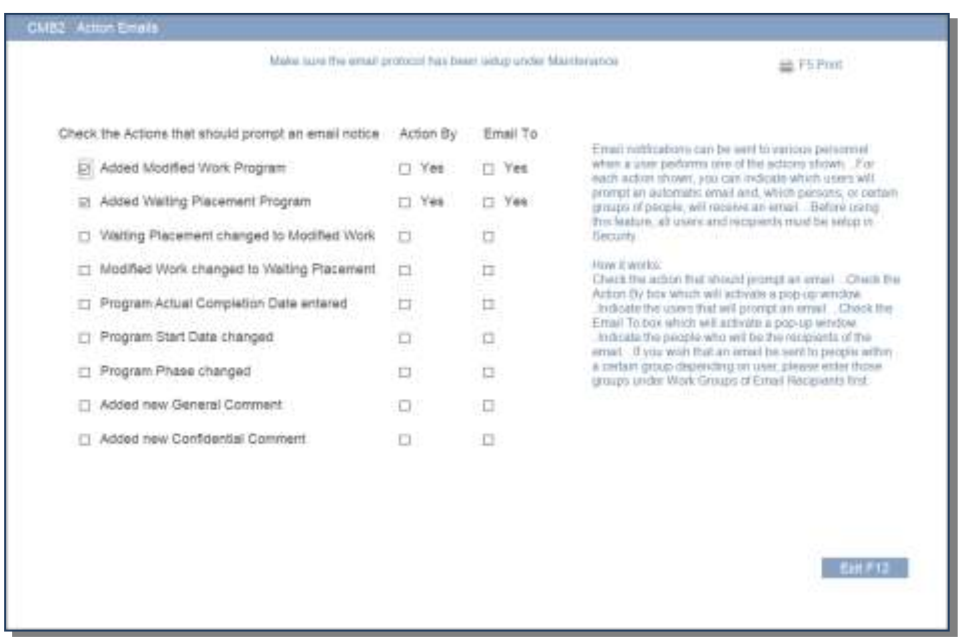




When an **Action** occurs, the system will determine what **Work Group(s)** the User is located in and will send an email to all other recipients within the Work Group(s).

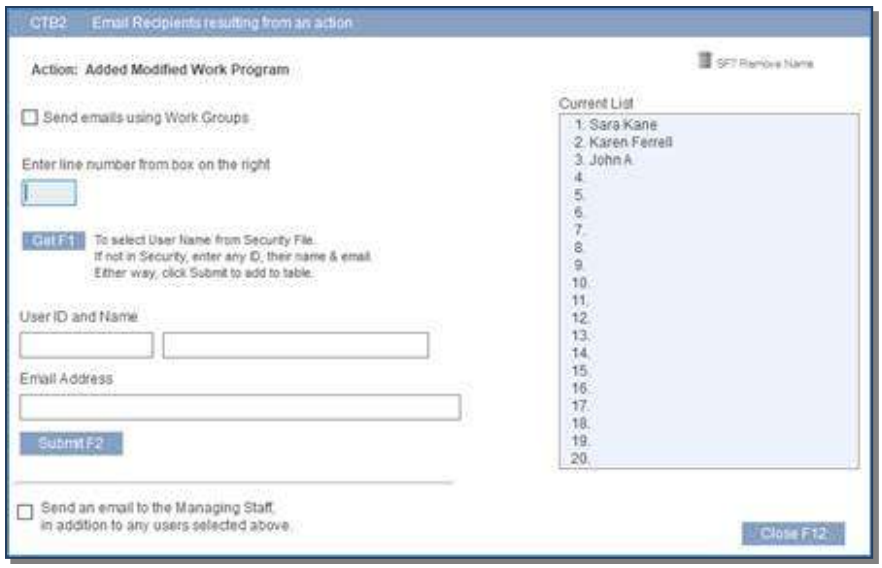
To setup the **Action Emails** click on **Options/Action to Prompt Emails** and select the action(s) that should prompt an email notification.

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.

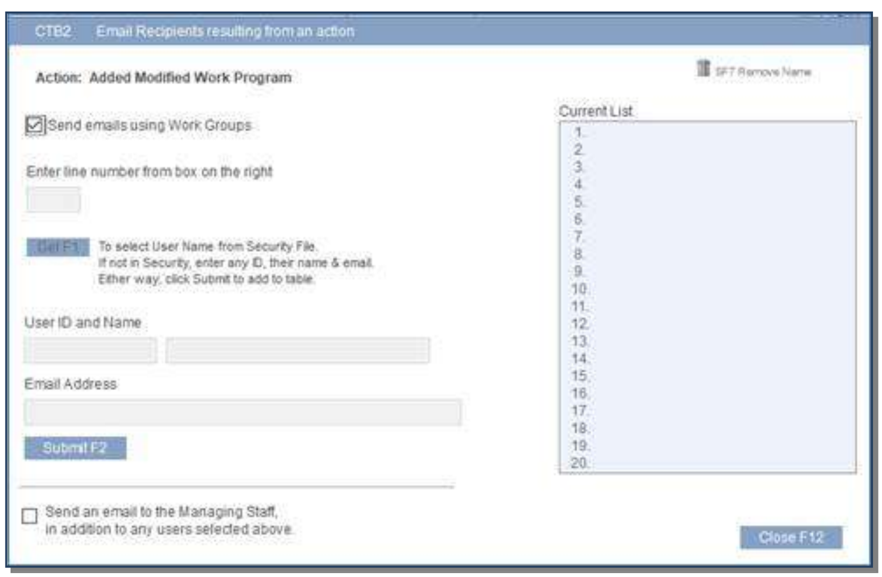


Click the **Action By** box which will activate a pop-up window. On this window indicate the users that will prompt an email to be sent. Up to 120 users can be identified.

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.

From: Health Safety Application [mailto:noreply@parklanesys.com]
Sent: October-28-20 9:45 AM
To: c.everitt@parklanesys.com; s.mccarthy@parklanesys.com; k.ferrell@parklanesys.com
Subject: Notification of User Action

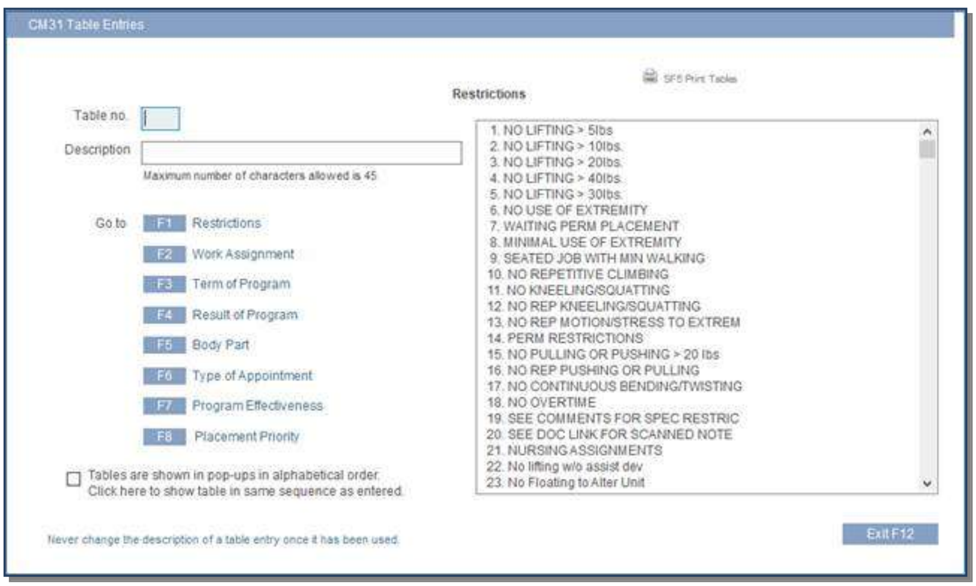
The following action was taken in the Parklane System.
--
Module: Work Accommodation
Action: Added Modified Work Program
--
Date: 28 Oct 20 at 9:45
User: Sara Kane
--
PKD-Company 002
Employee: BROOK, SHARON
Department: FINANCE, Finance
Employee Key: 000066
--
Work Acc. Start Date: 07 Sep 20
--
Please do not reply to this automated message.

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.

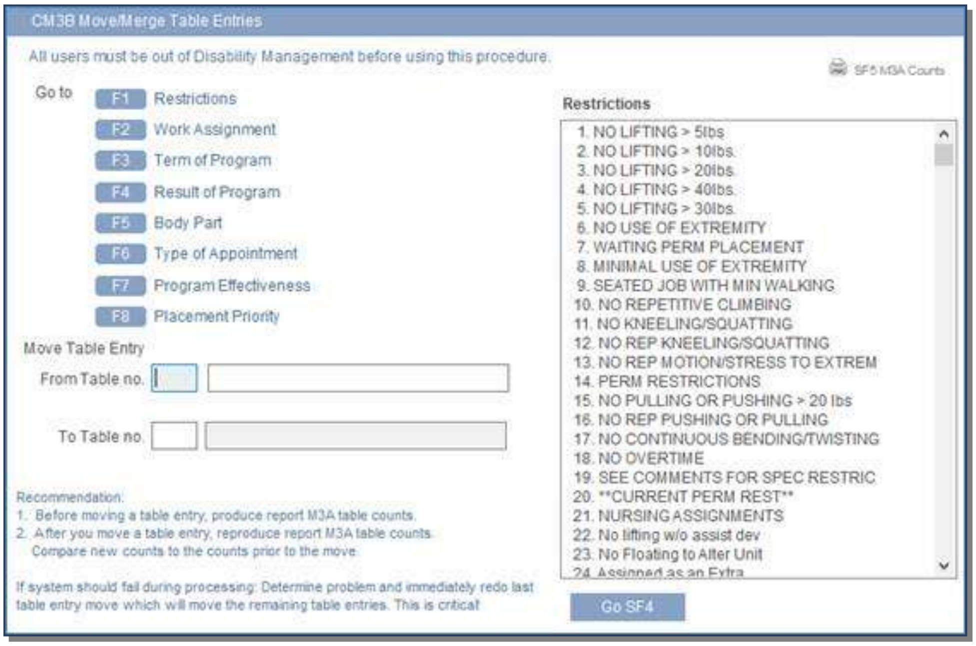


Do not type over an existing descriptor as the change will affect previously entered program data.

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.

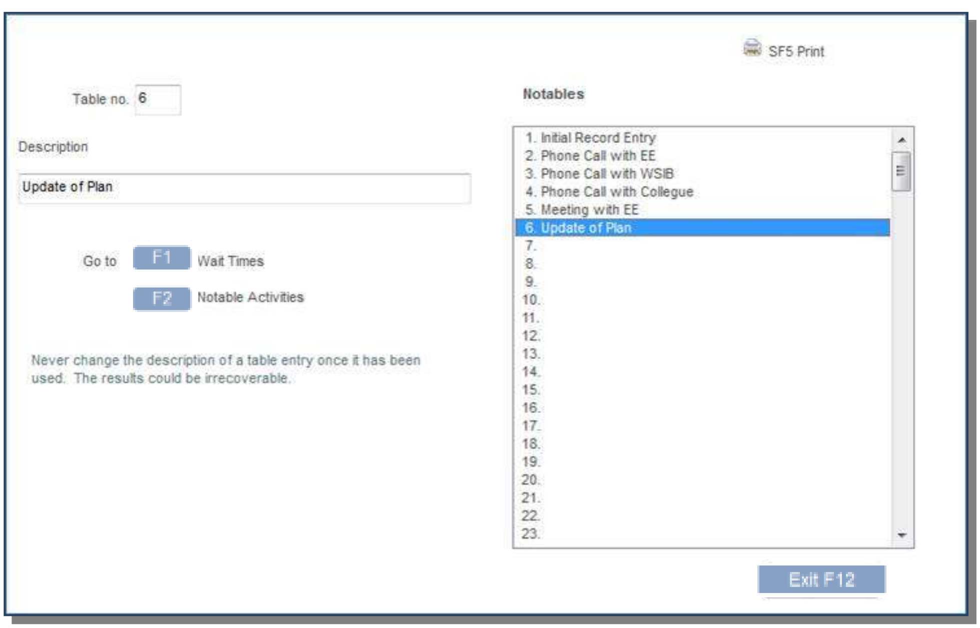
It is recommended that once the move is complete, rerun the M3A Table Counts to ensure the tagged entries have moved to the selected table. Update the Table Description text if necessary.

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.

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

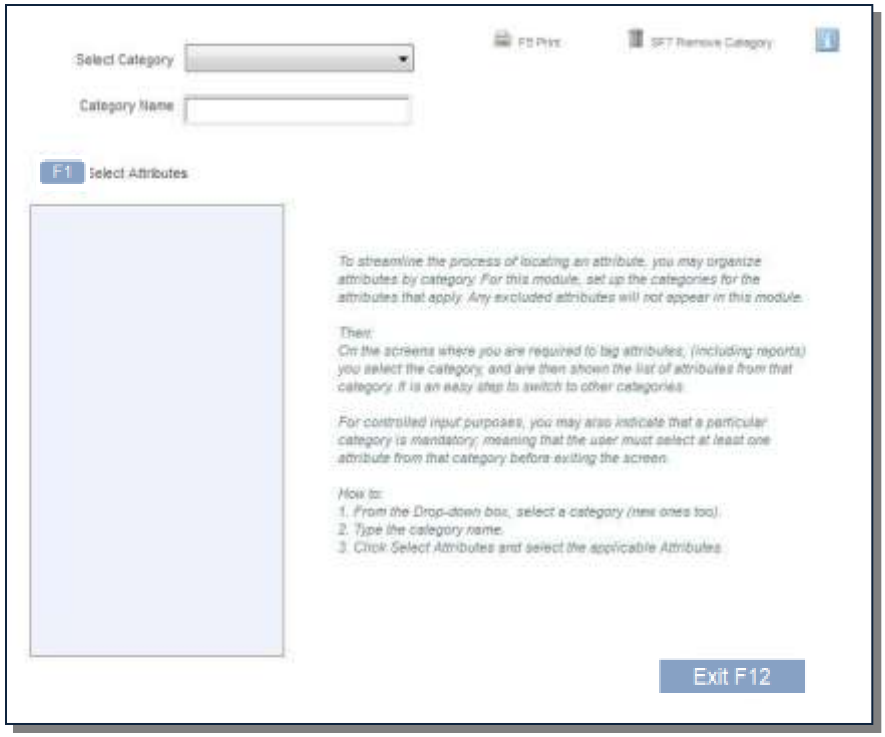


Categorize Attributes

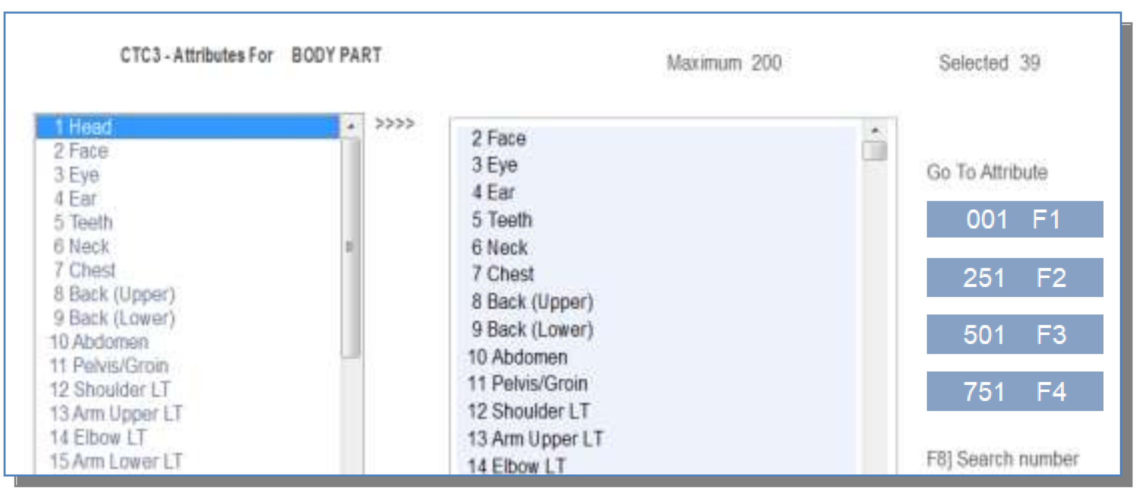
To streamline the process of selecting attributes from a large table, they can be organized by category. For this module, setup the categories for the attributes which apply. Any excluded attributes will no longer appear in this module. On any of the panels where attributes are available to you for selection, 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.



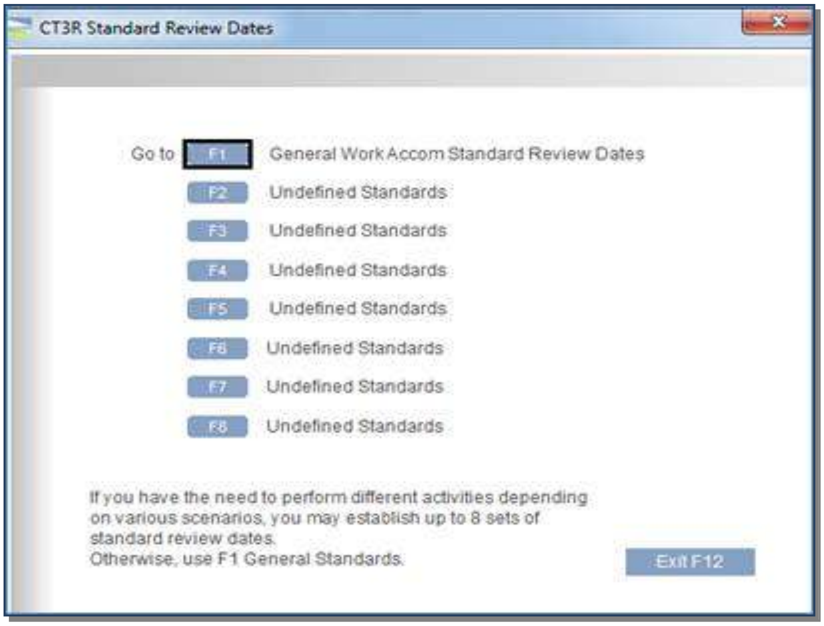
Click on the **F1>Select Attributes** button and you will be presented with the **Attributes for Category** panel:



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.

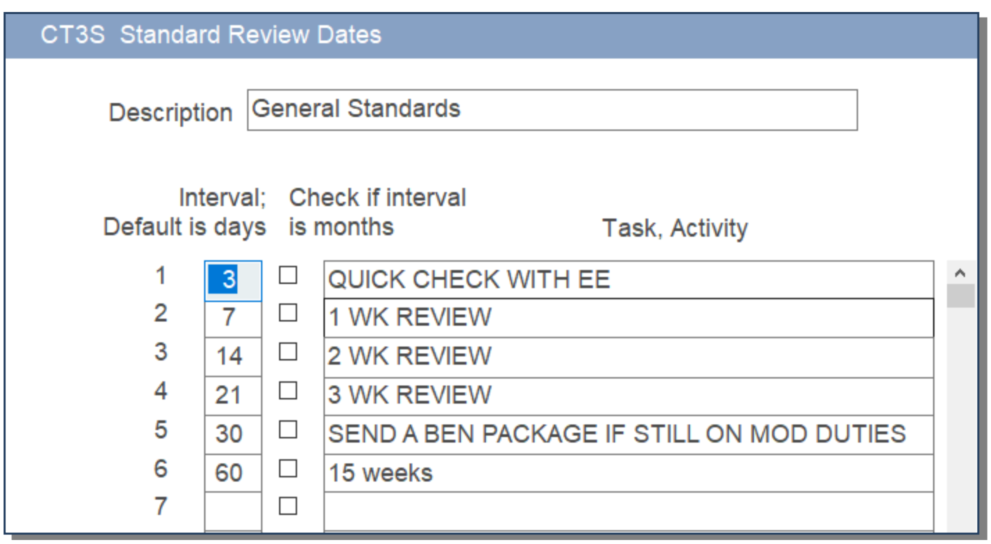
Standard Review Dates

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



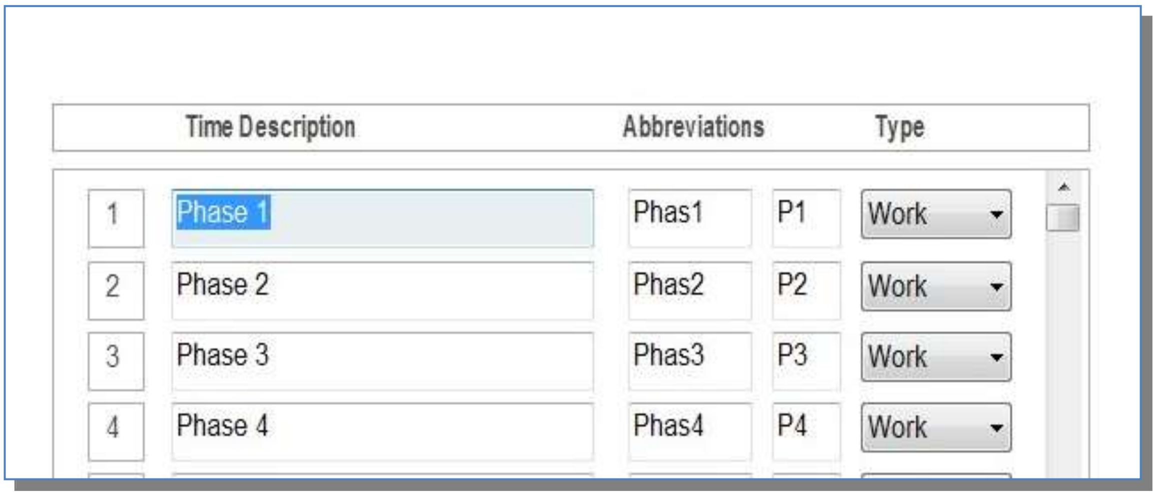
Select a set identifier and enter a **Description** name for the set. You may enter routine follow-ups and identify the interval (number of days) in relations to the start date of the record. You may enter up to 50 pre-defined activities or procedures per set. The interval days will be used to determine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



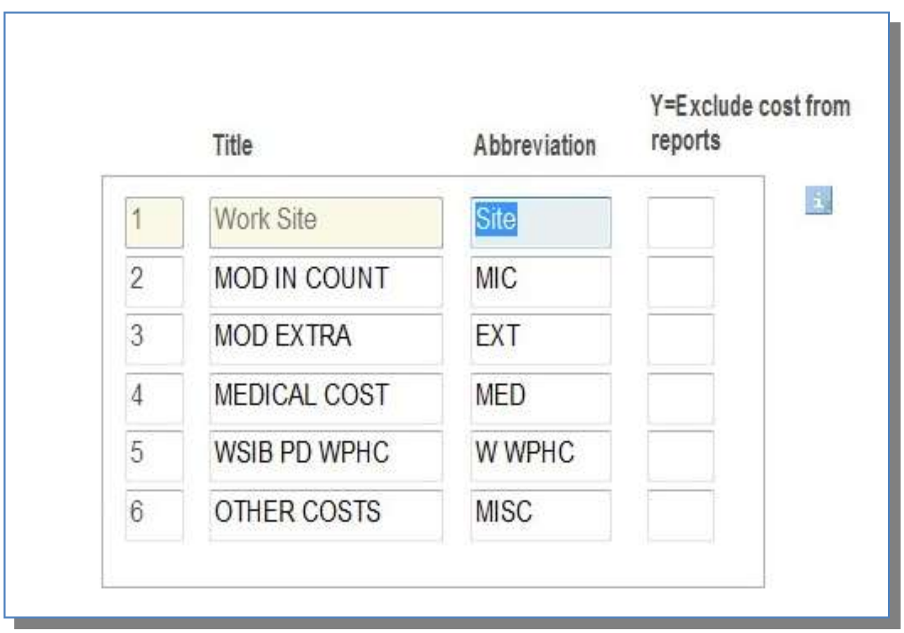
Time Entry Codes

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.

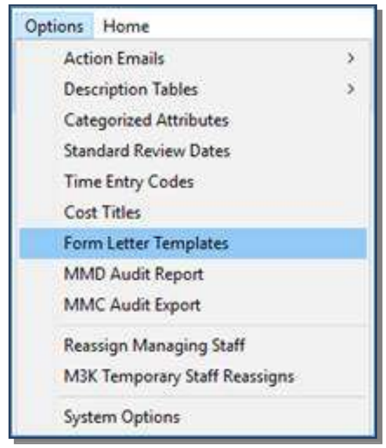


Cost Titles

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.



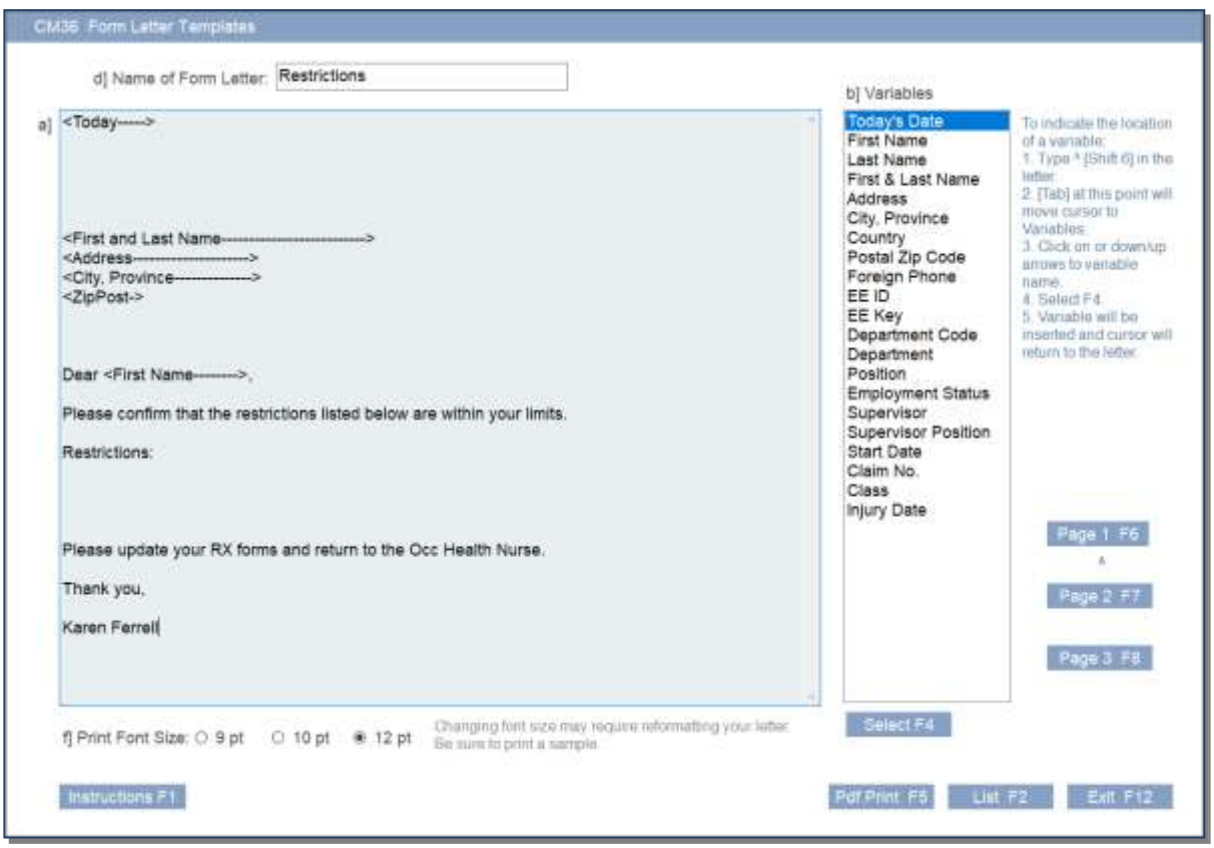
Form Letter Templates



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**.

PARKLANE SYSTEMS

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 produced 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

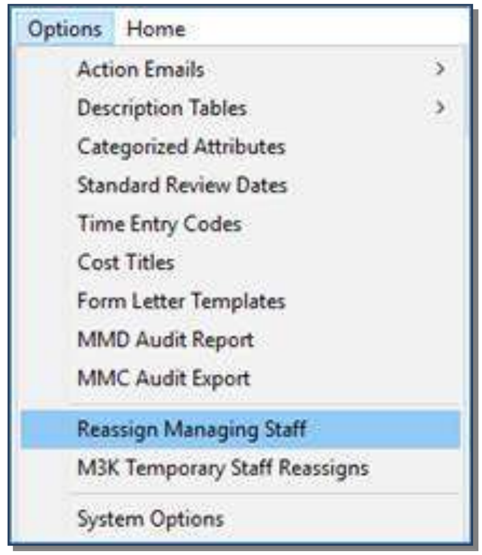
Select a template from the list.

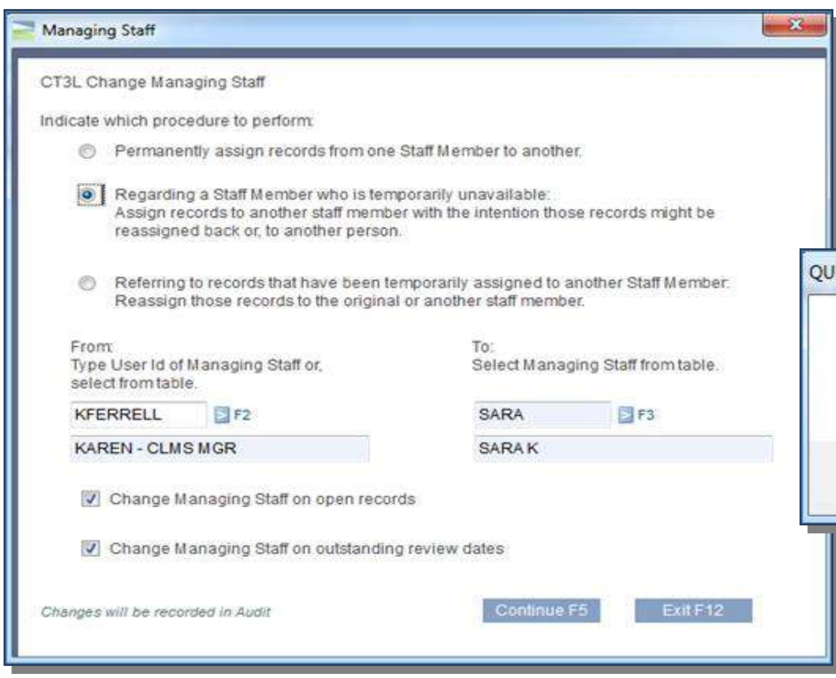
- For a new template, select the first 'Not Defined".
- Provide a name or description of the template.
- Under "Variables" there is a list of the personalized information that can be inserted in the template.
- In the Template area, type the text as it is to appear in the letter.
  Where a variable is 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

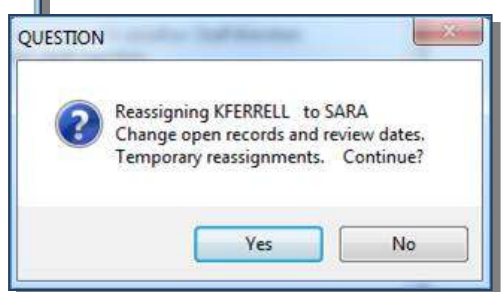
As staff depart, vacation, take leave, or changes in user caseload are necessary, this utility provides the ability to permanently or temporarily change the Managing Staff field on all open records and/or outstanding Review Dates from one User ID to another. In the case of a temporary reassignment, the 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 question box will appear asking for confirmation of the reassignment.

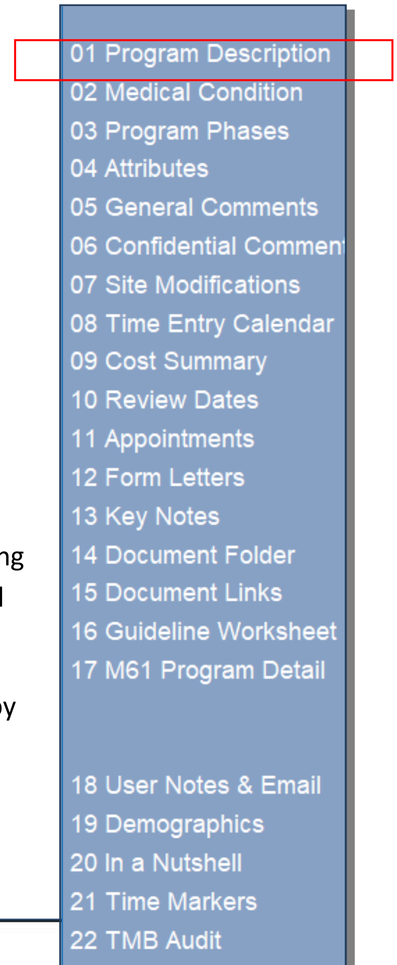


Once the utility is complete, reports will be generated which provide the details of the reassignment.

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.

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.

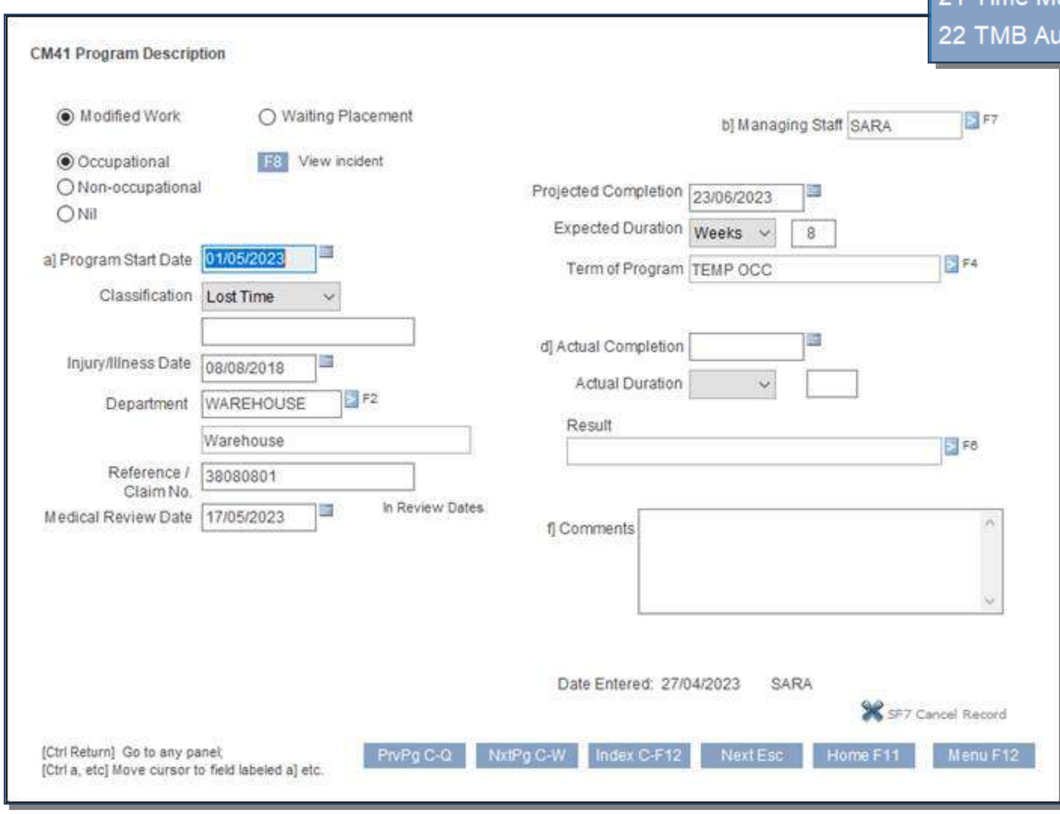
Program Description

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

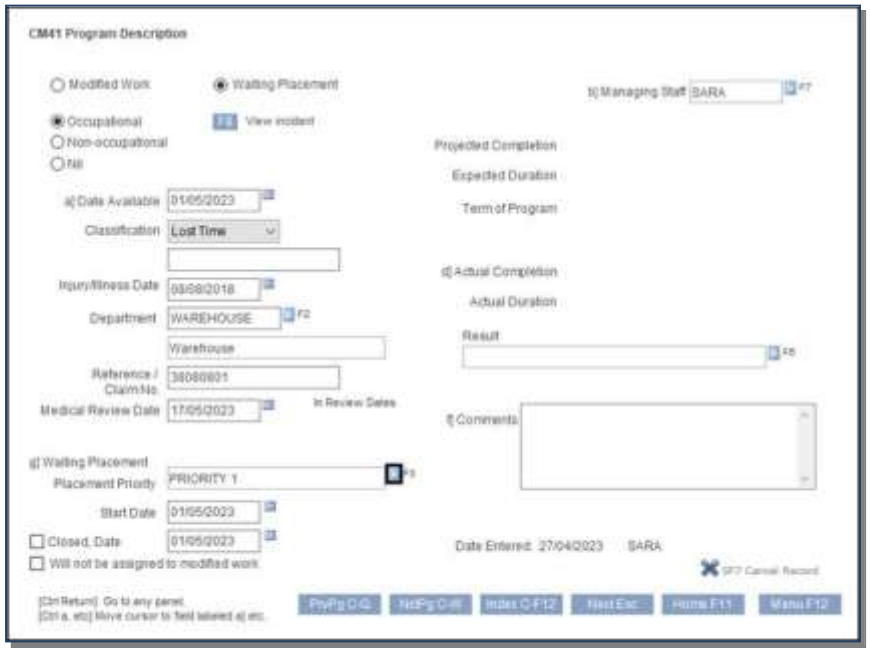
The system will default to a modified work program. Alternately you may select Waiting Placement for a job. This initial selection determines which Program Description panel will appear.

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

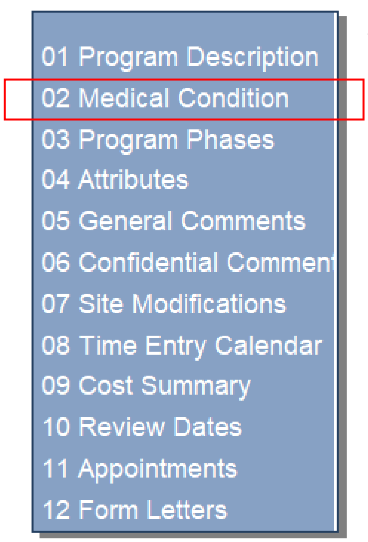
Turning on the Modified Work radio button will present this panel:



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

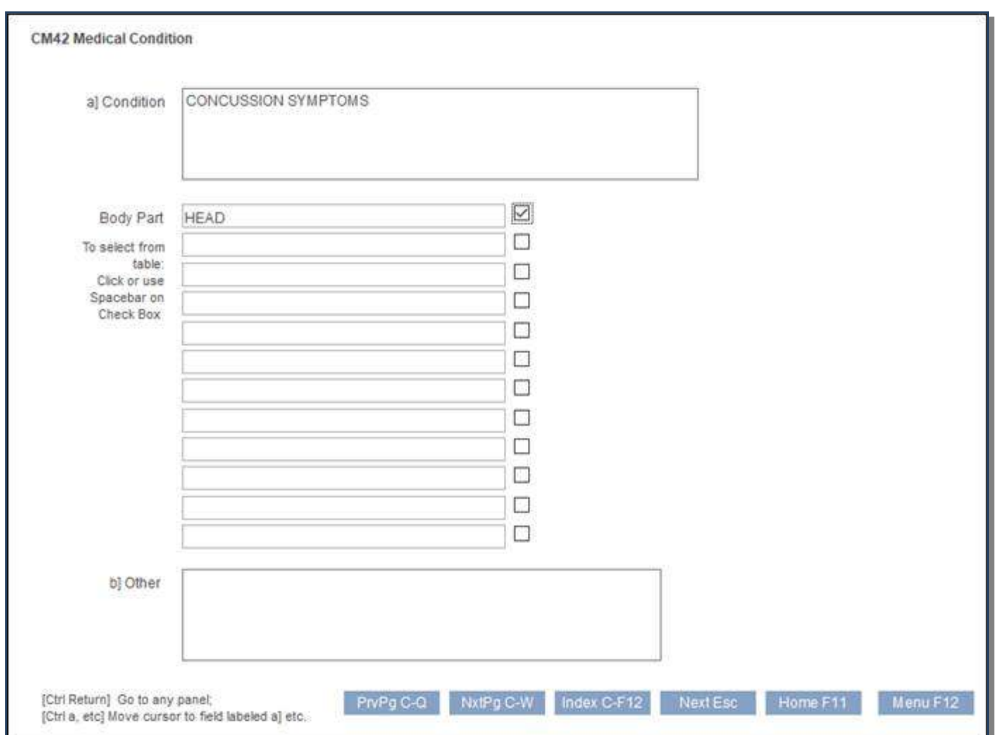


Medical Condition



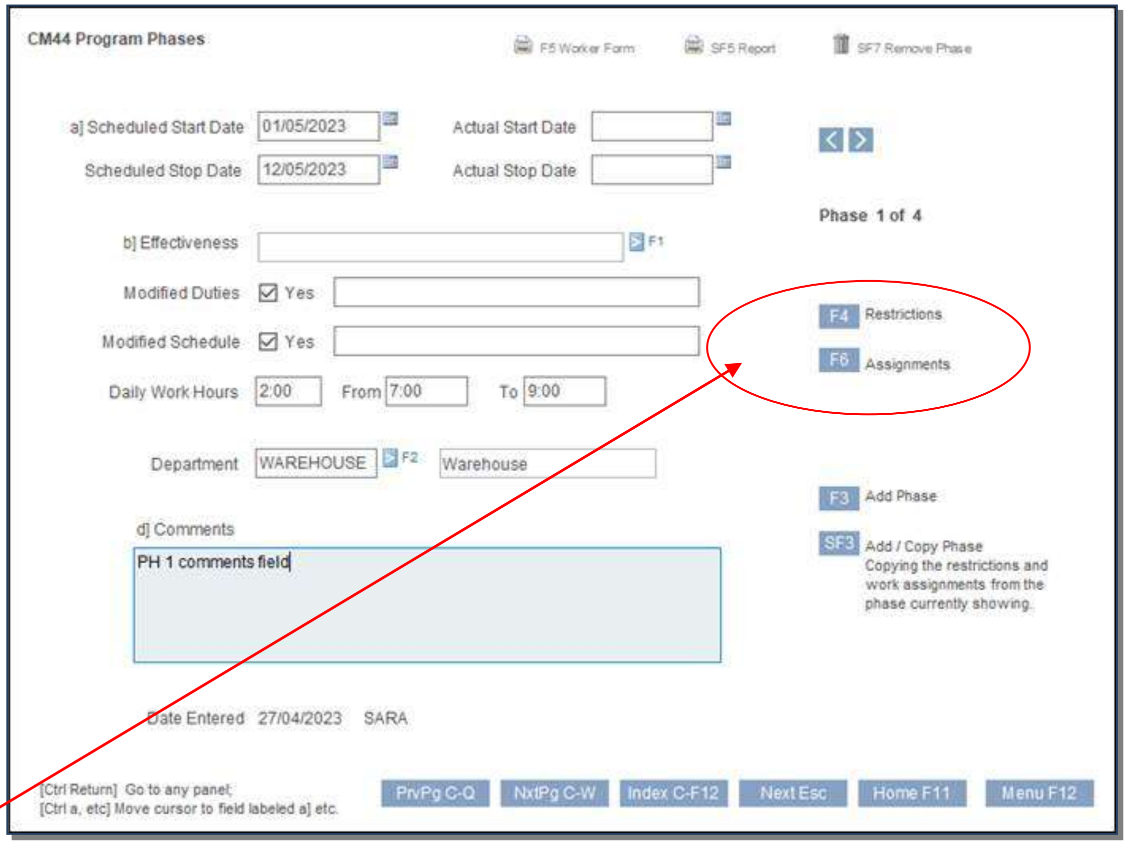
Select the next panel **Medical Condition**. Enter a text description of the **Condition**.

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.

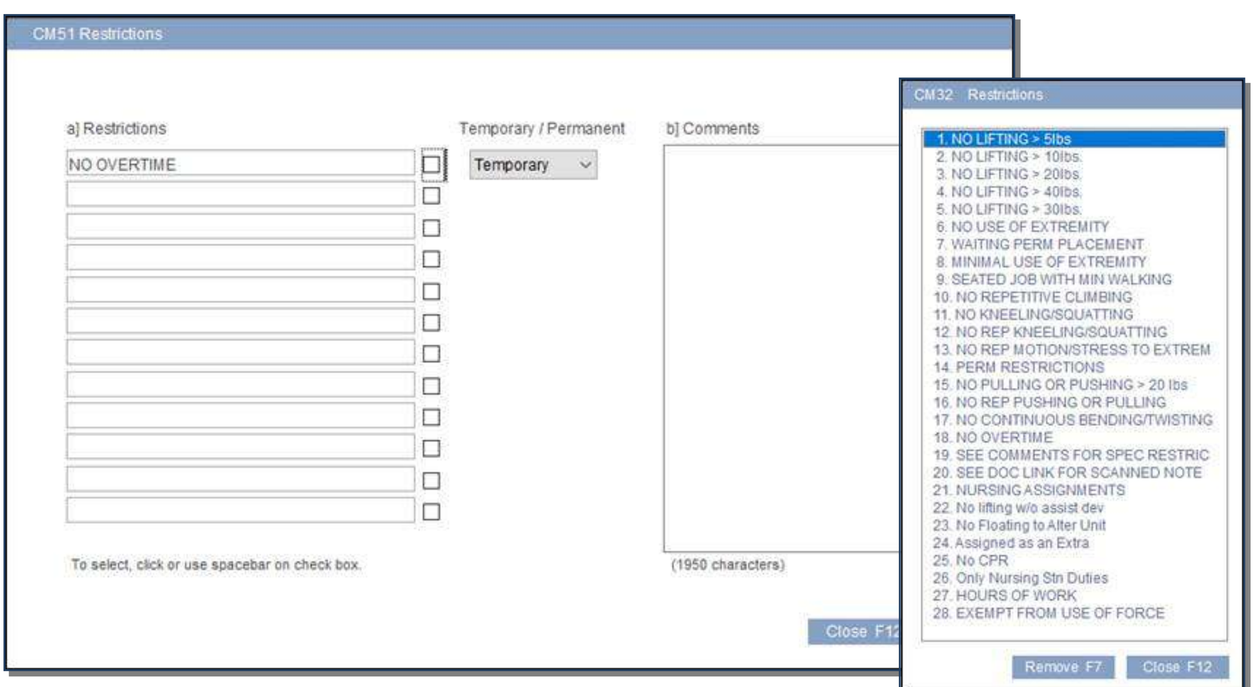


Program Phases

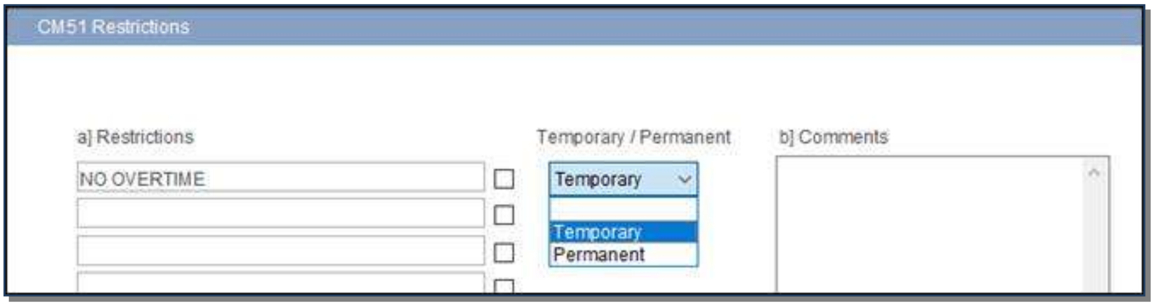
Referring to the Sidebar menu, select the next panel **Program Phases**. Here you will begin to identify each individual segment of the employee's program. Initially complete the appropriate fields for the planned program.



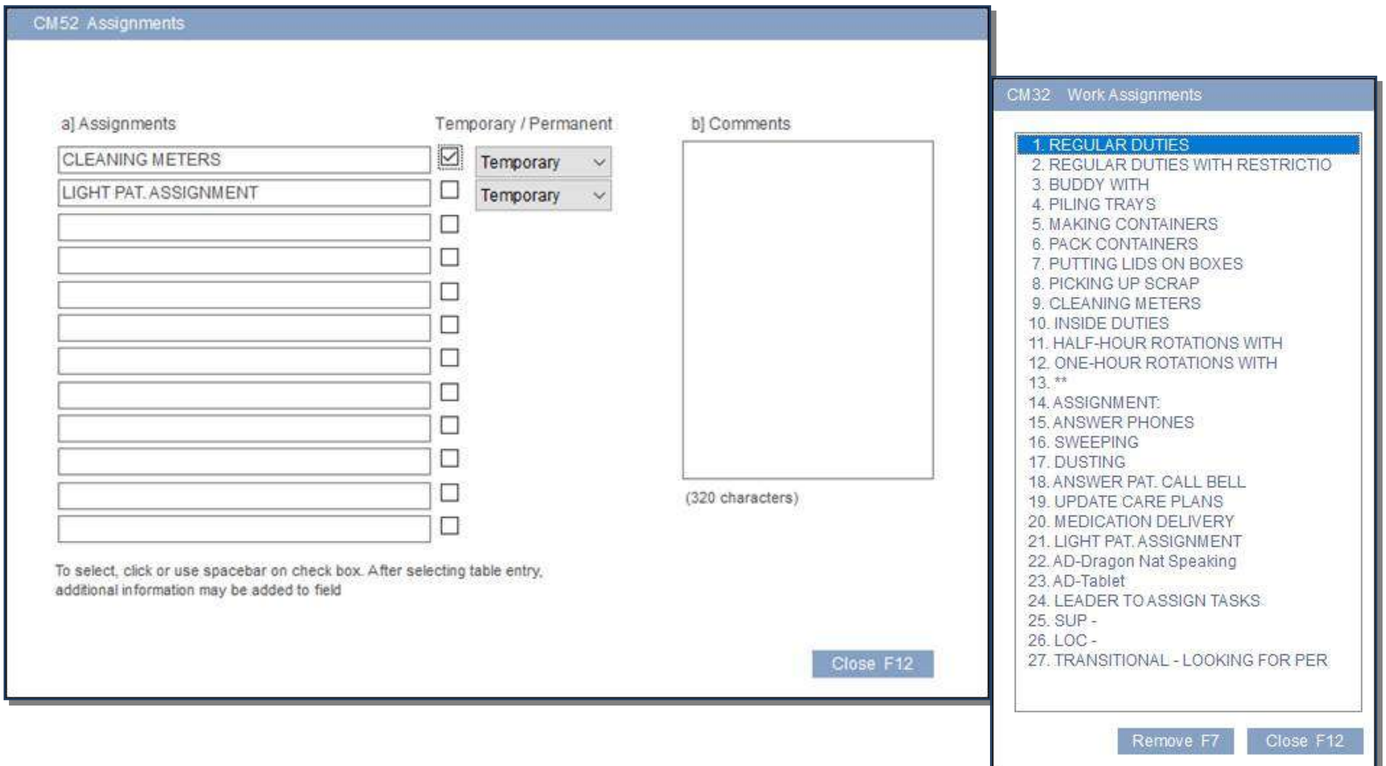
Click on **Restrictions** and then click on the appropriate check box to select a restriction.



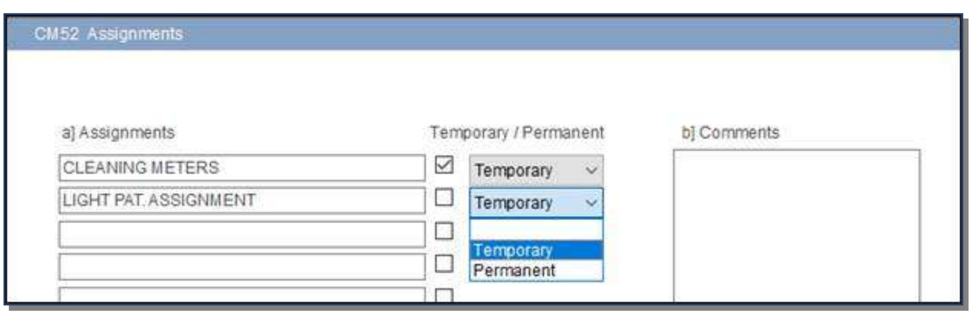
Indicate whether the restriction is **Temporary** or **Permanent.**



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

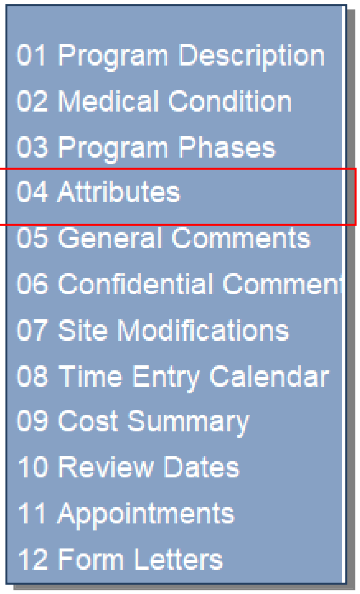


Indicate whether the assignment is **Temporary** of **Permanent**.



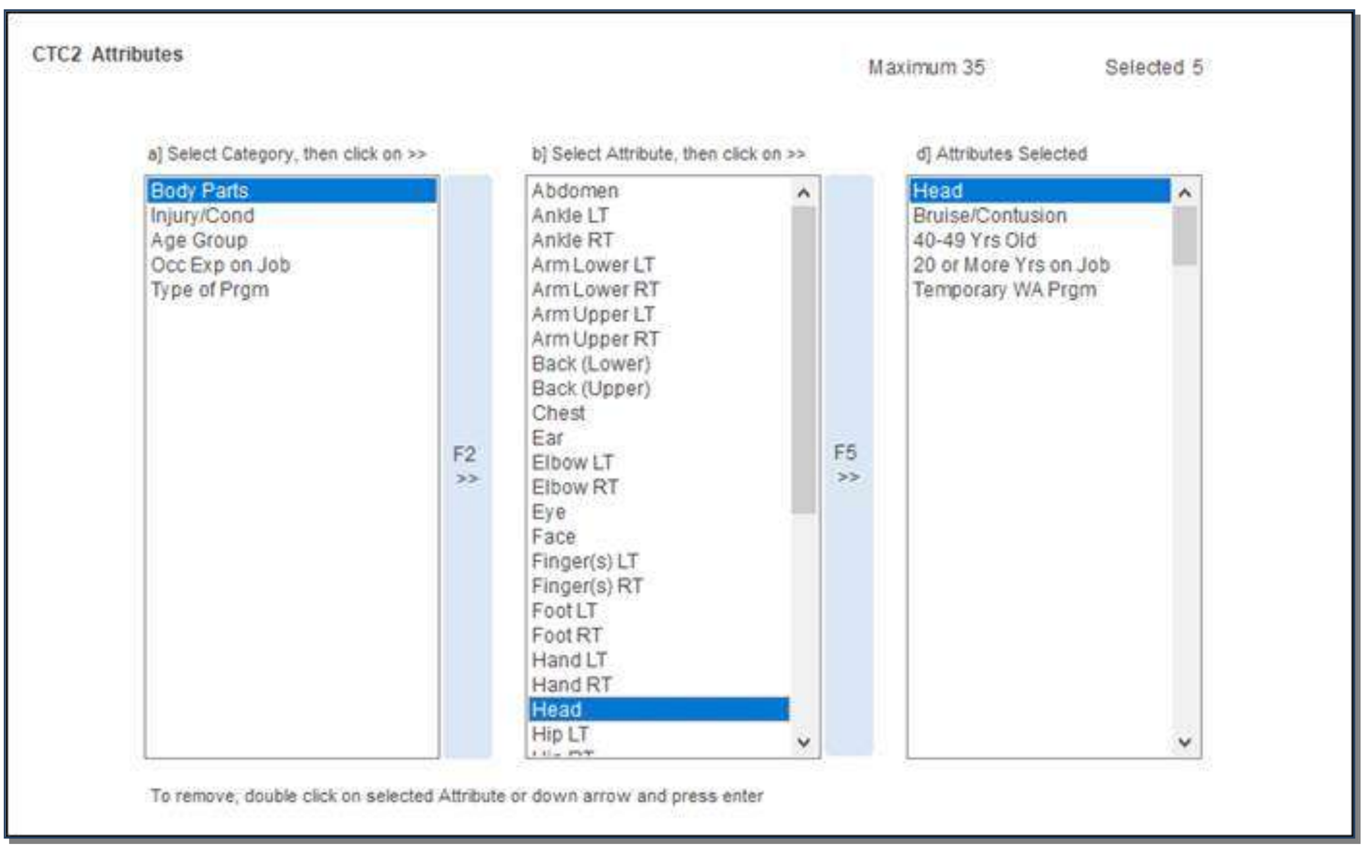
Click **Close F12** to return to the **Program Phases** panel.
Multiple phases can be entered for a program.

Attributes



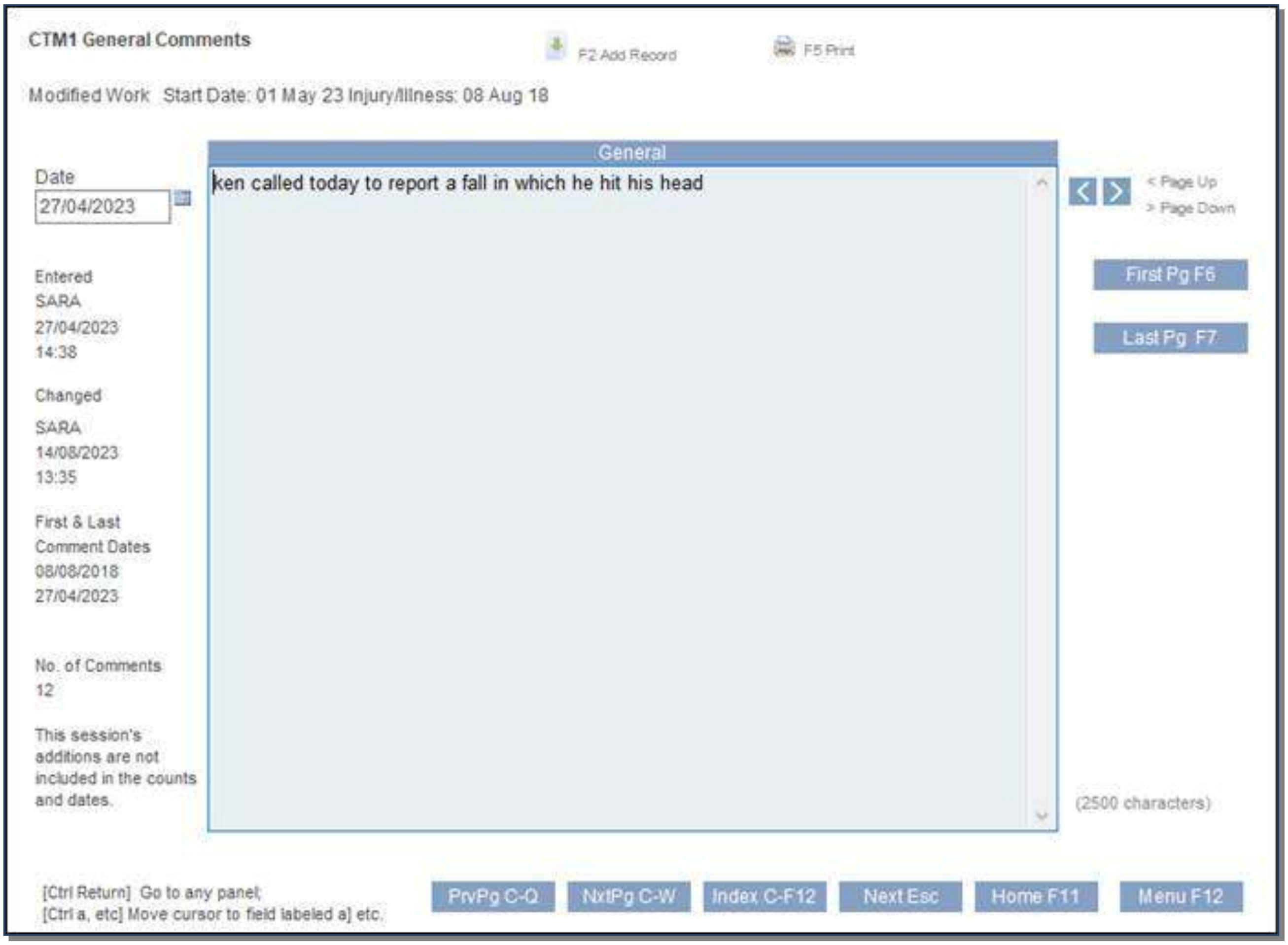
The **Attribute** panel allows the user to tag appropriate descriptions related to the program. Access the Sidebar menu to select the **Attribute** panel. Make the selection(s) of Category from the choices in the left column and select an attribute(s) from the Category. The selected attributes will appear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



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.

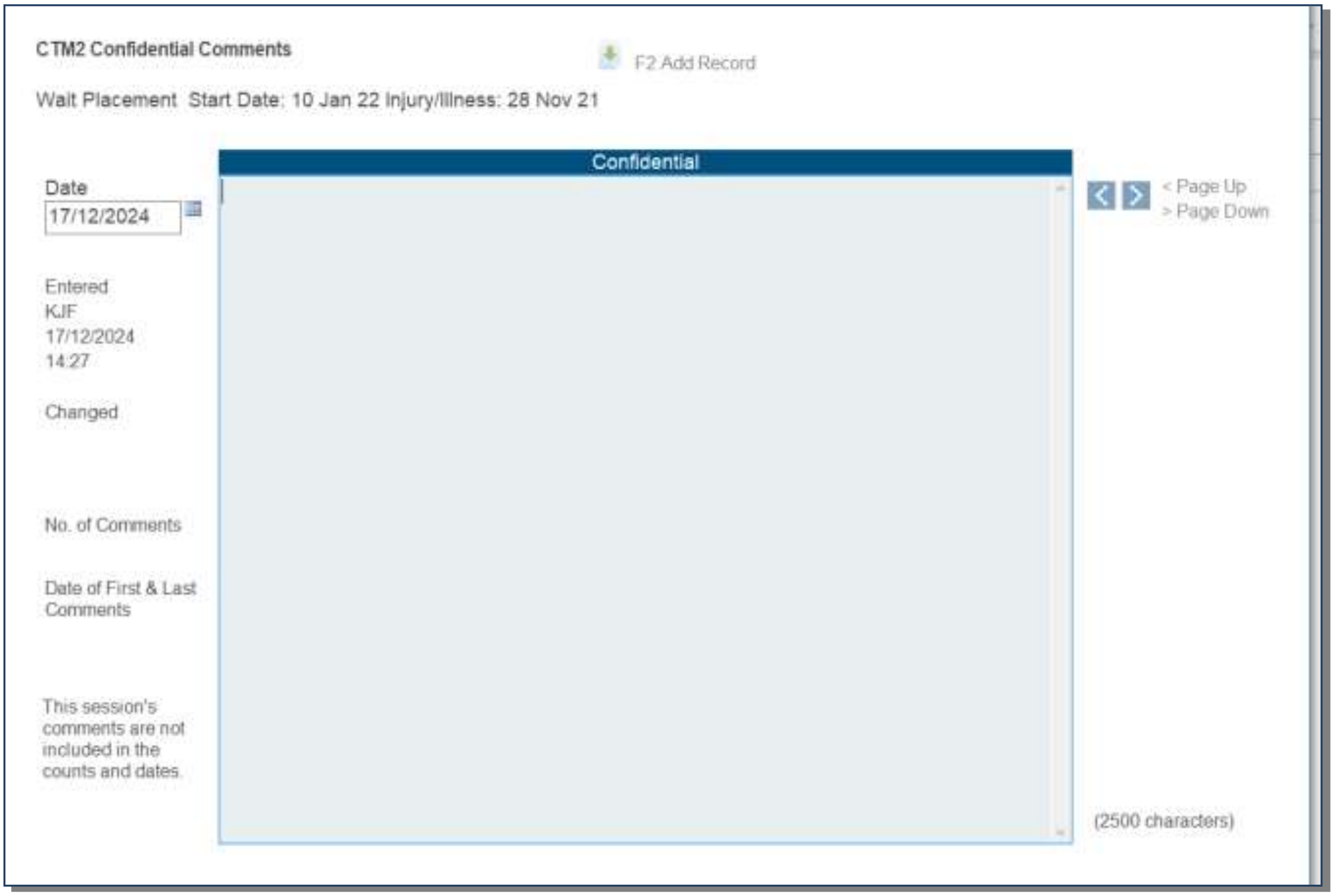


When opening an existing program and accessing the **General Comments** panel, it will appear that no **Comments** exist. Press the arrow buttons to see any previously entered **Comments**.

Comments may be secured to disallow future changes.

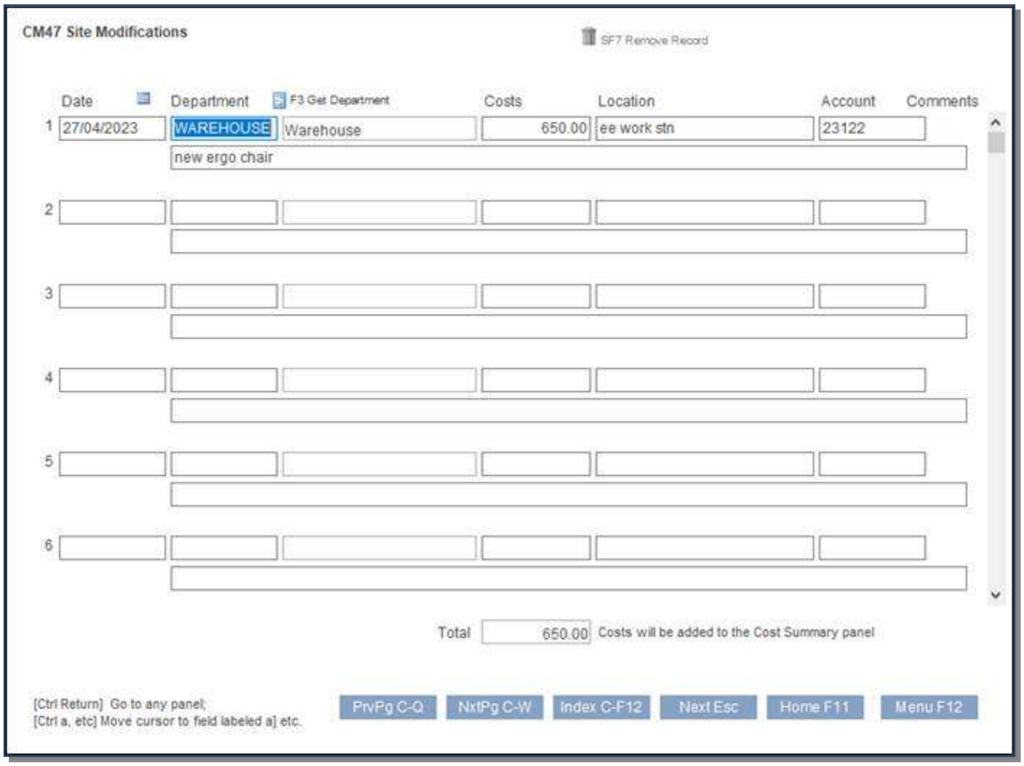
Confidential Comments

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



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.

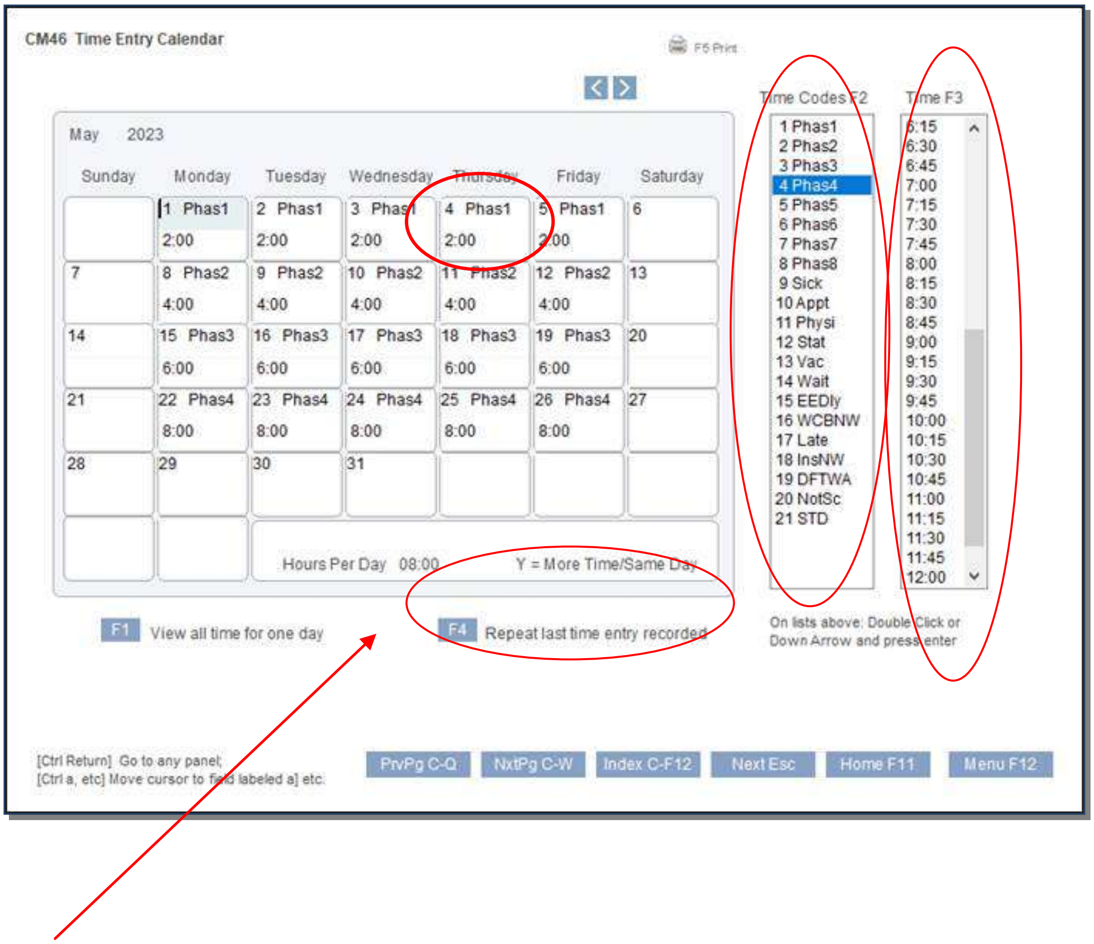


You may enter multiple modifications by clicking on a blank line and completing the fields provided.

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

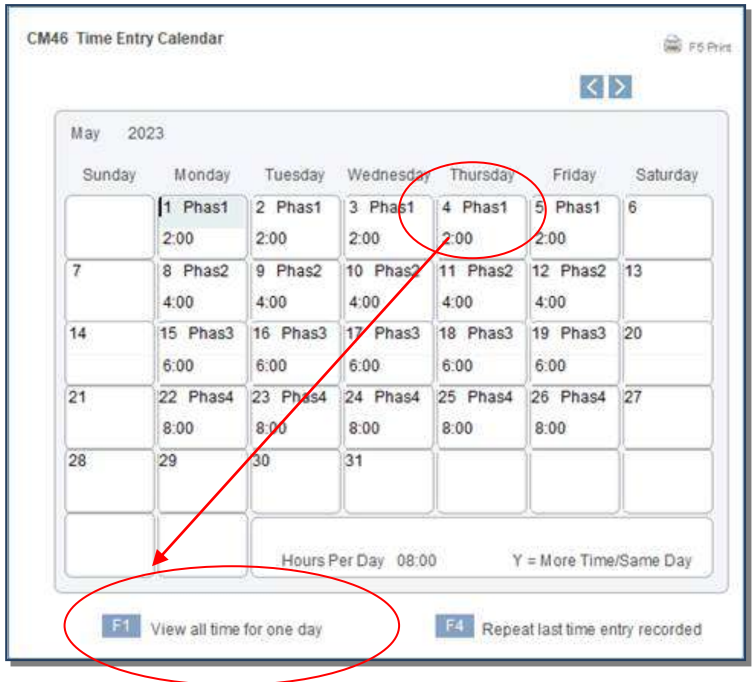
Time Entry Calendar

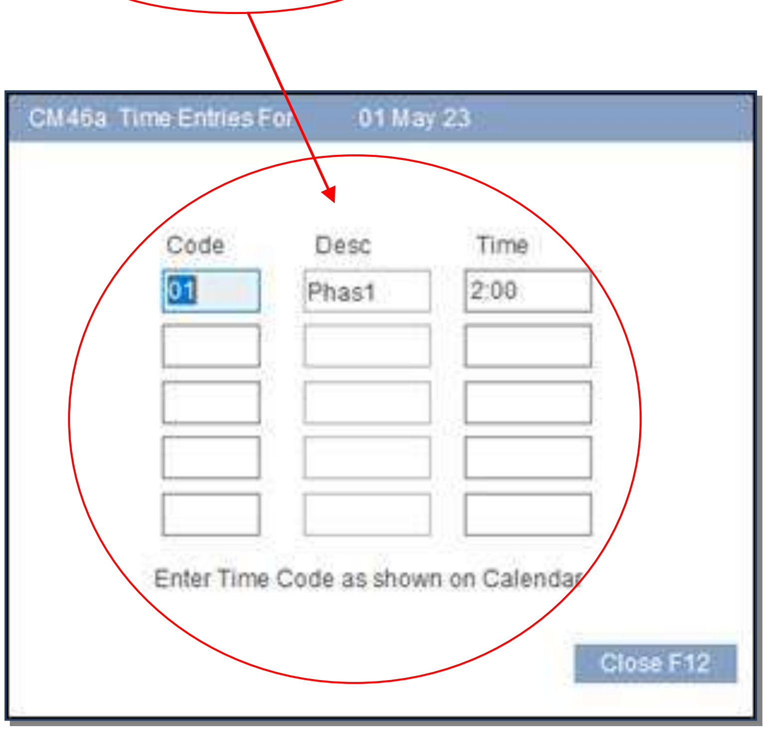
Referring to the Sidebar menu, select the next panel **Time Entry Calendar**. Click on the date box that the program is going to begin. Then click on the **Time Codes** from the table to the right of the panel. The hours will auto-fill from the **Personal Data** module. If the hours are not correct,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



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.





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

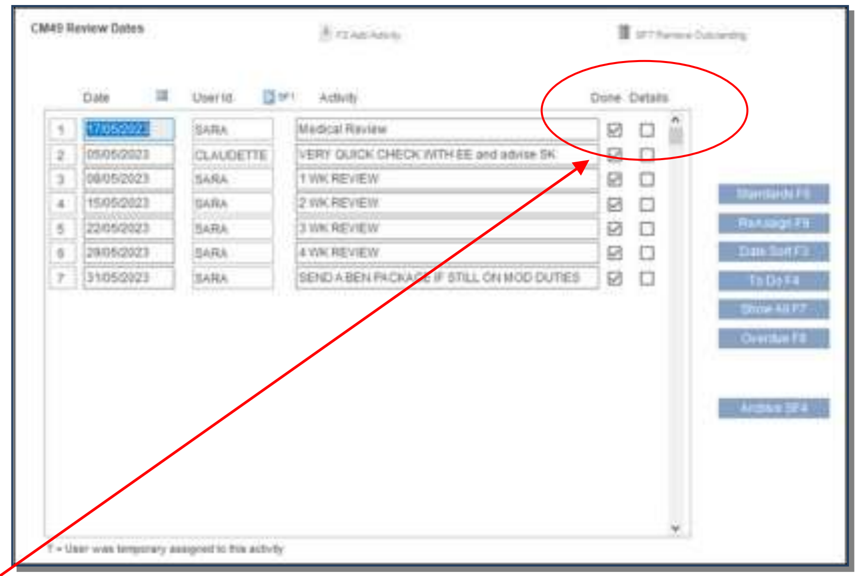
Costs

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.

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.



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.

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.

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.

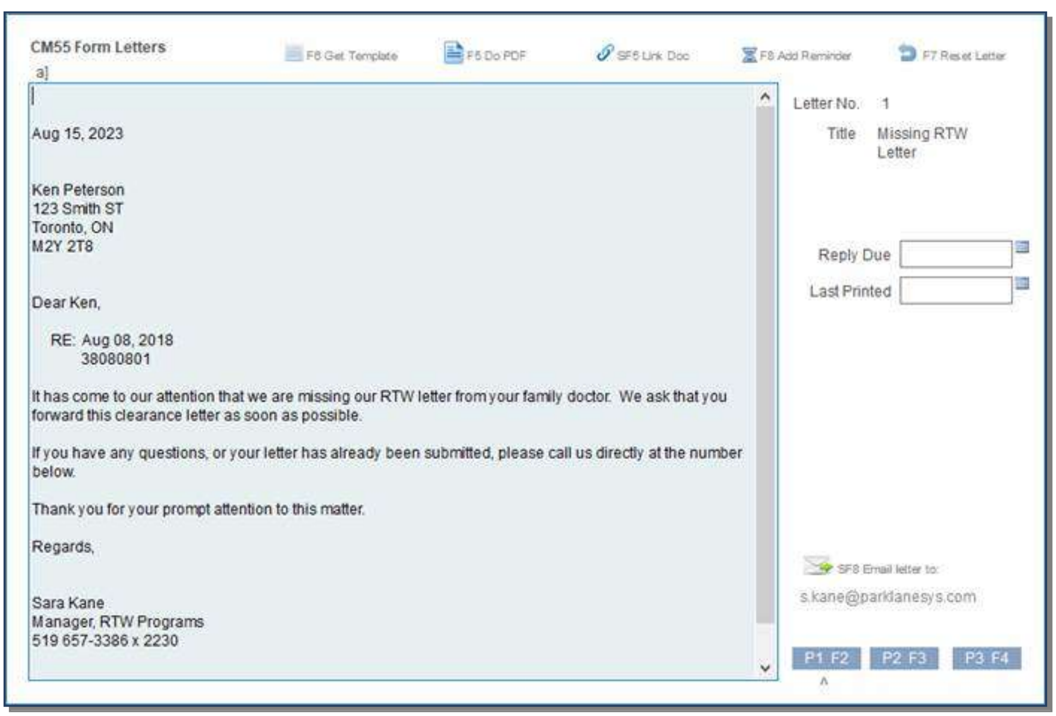
Print the letter by clicking on **Print to PDF**. Once the PDF opens, all application features are available to the user. Clicking Print will send the letter to a default printer to create a paper copy.

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.



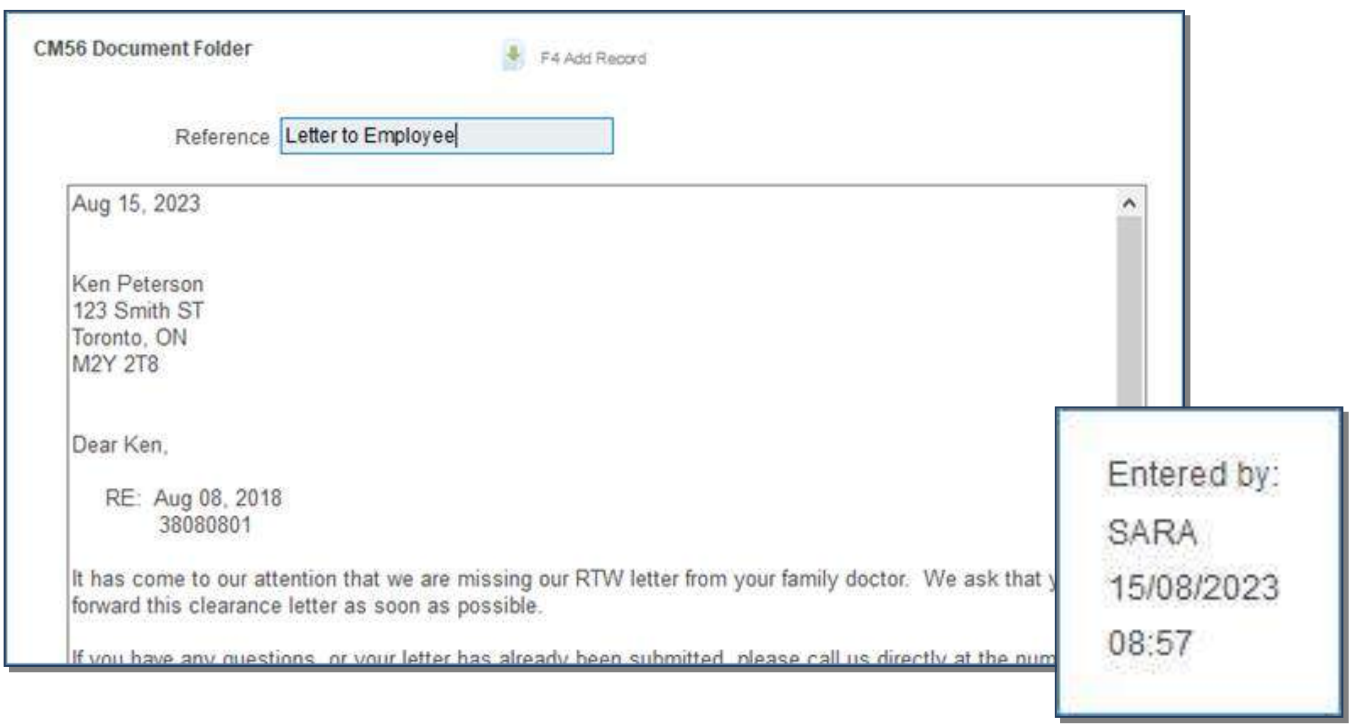
Key Notes

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:

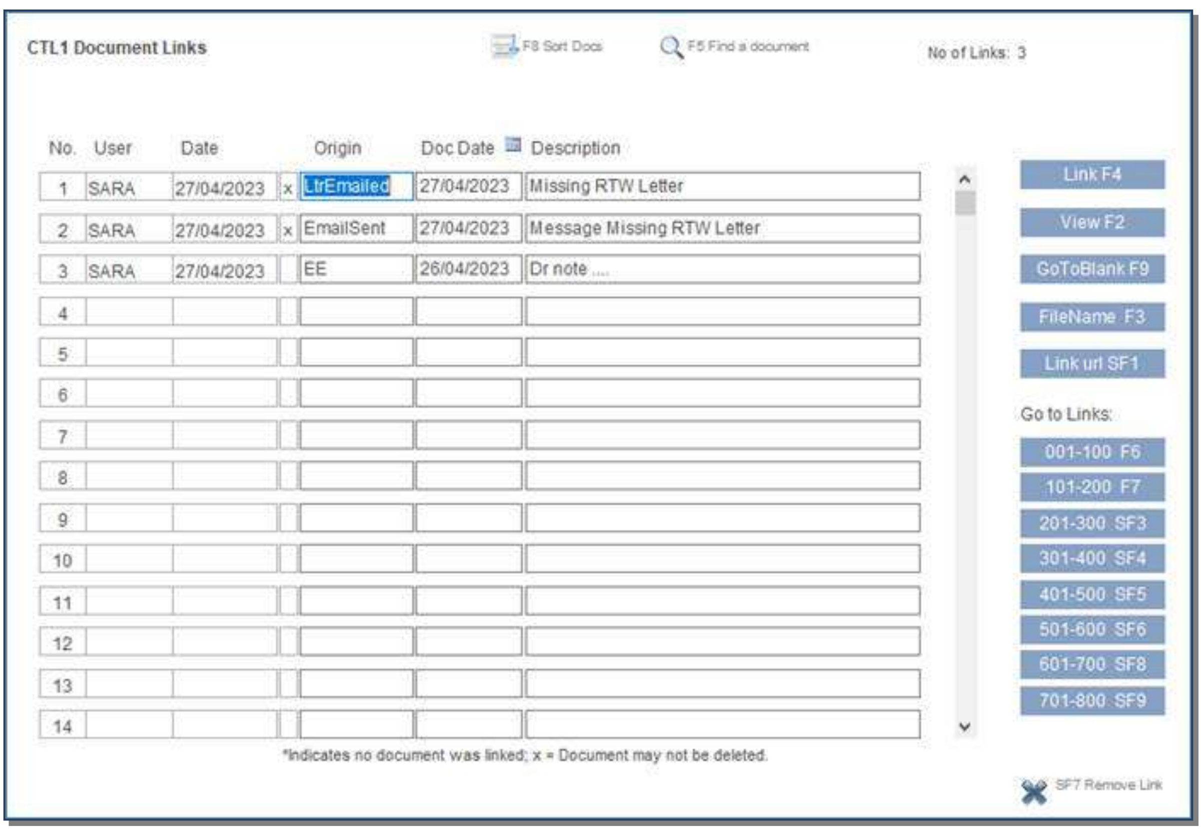
- Documents (.doc, .pdf)
- Images (.jpg, .gif)
- Spreadsheets (.xls)
- Emails (.msg, .html)

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.



Guideline Worksheet

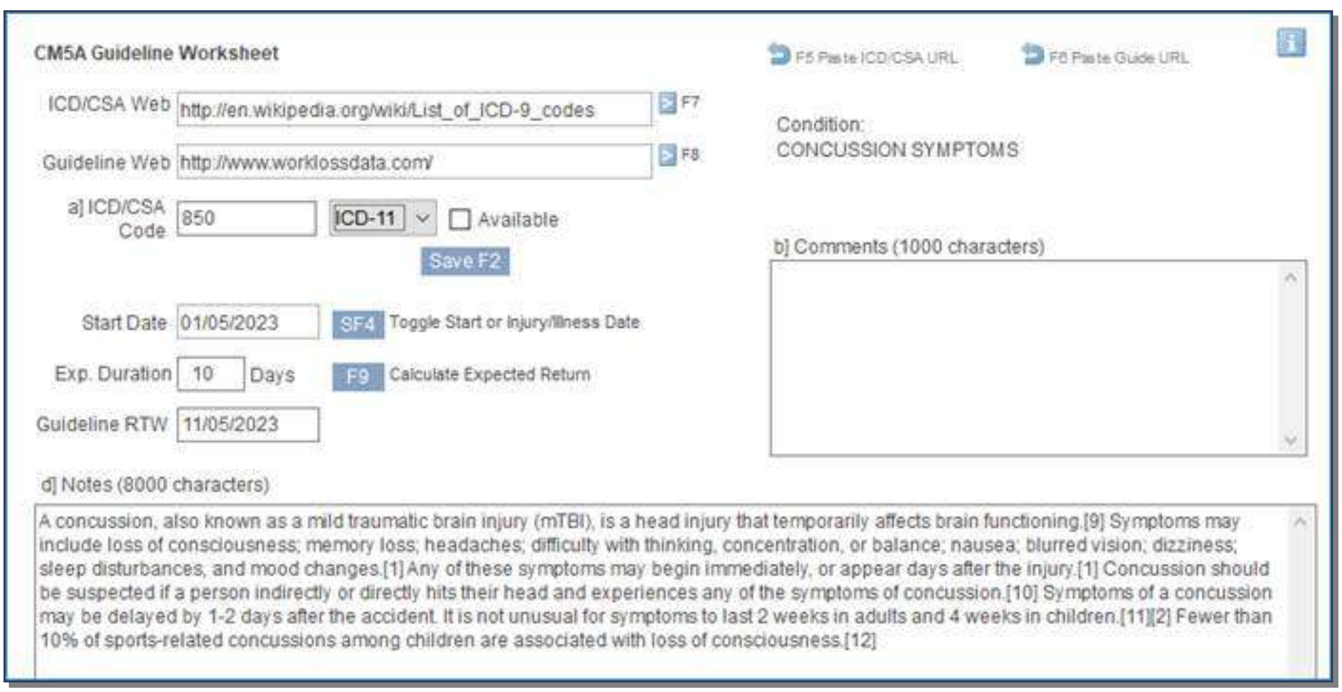
This worksheet allows for easy access to Disability Guidelines (DG) subscriptions and retrieval of pertinent information about injuries/illnesses, including expected days off.

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.

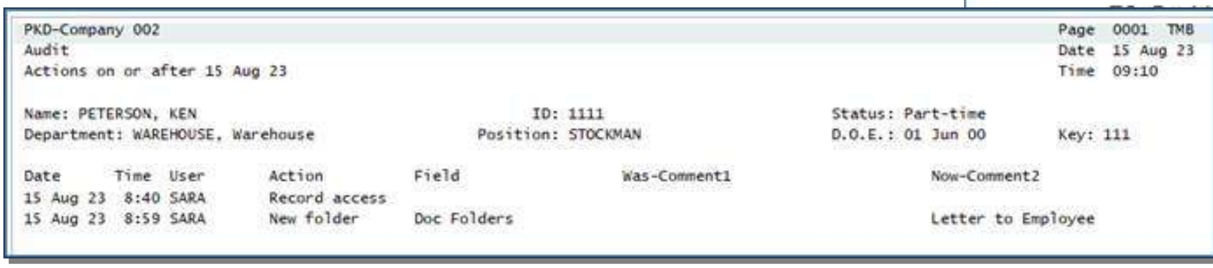
Reference material from the Disability Guideline may be keep for future access. Keep the entire web page or select specific excerpts. To keep the entire web page, print the page to a pdf and store in a temporary directory. Click on the Save button, point to the pdf and the system will store a copy of 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.



TMB Audit

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



```
PKD-Company 002                                                                          Page  0001  TMB
Audit                                                                                    Date  15 Aug 23
Actions on or after 15 Aug 23                                                            Time  09:10

Name: PETERSON, KEN                          ID: 1111                 Status: Part-time
Department: WAREHOUSE, Warehouse         Position: STOCKMAN           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
```

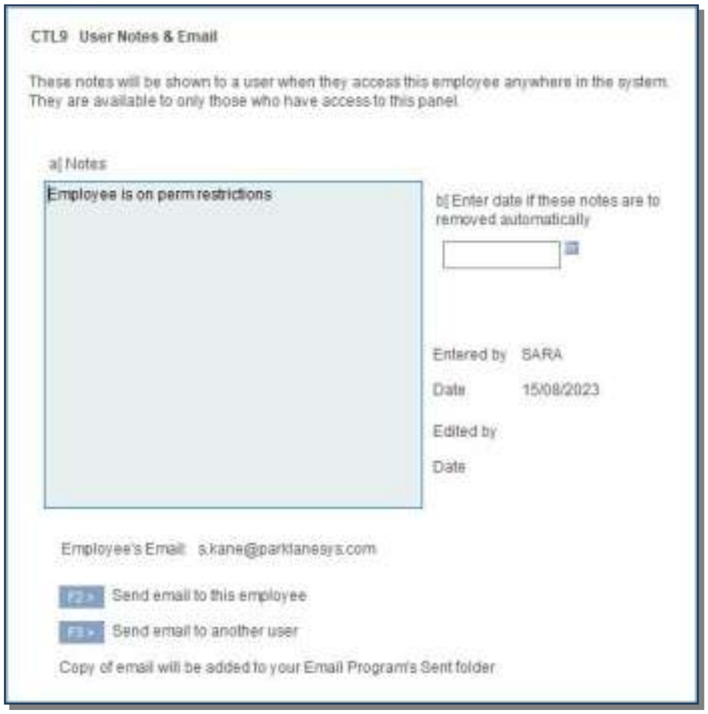
User Notes & Email

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.



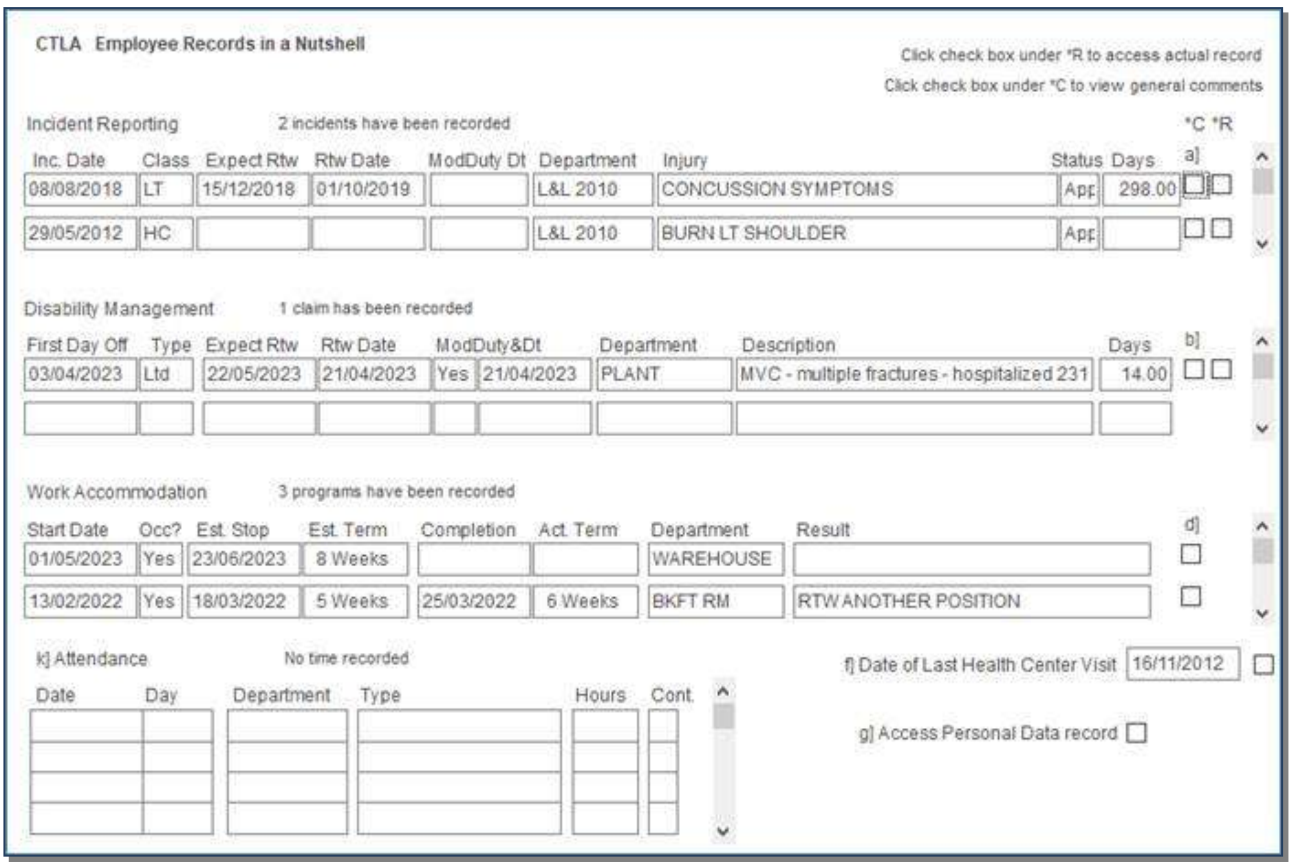
Demographics

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.

In a Nutshell

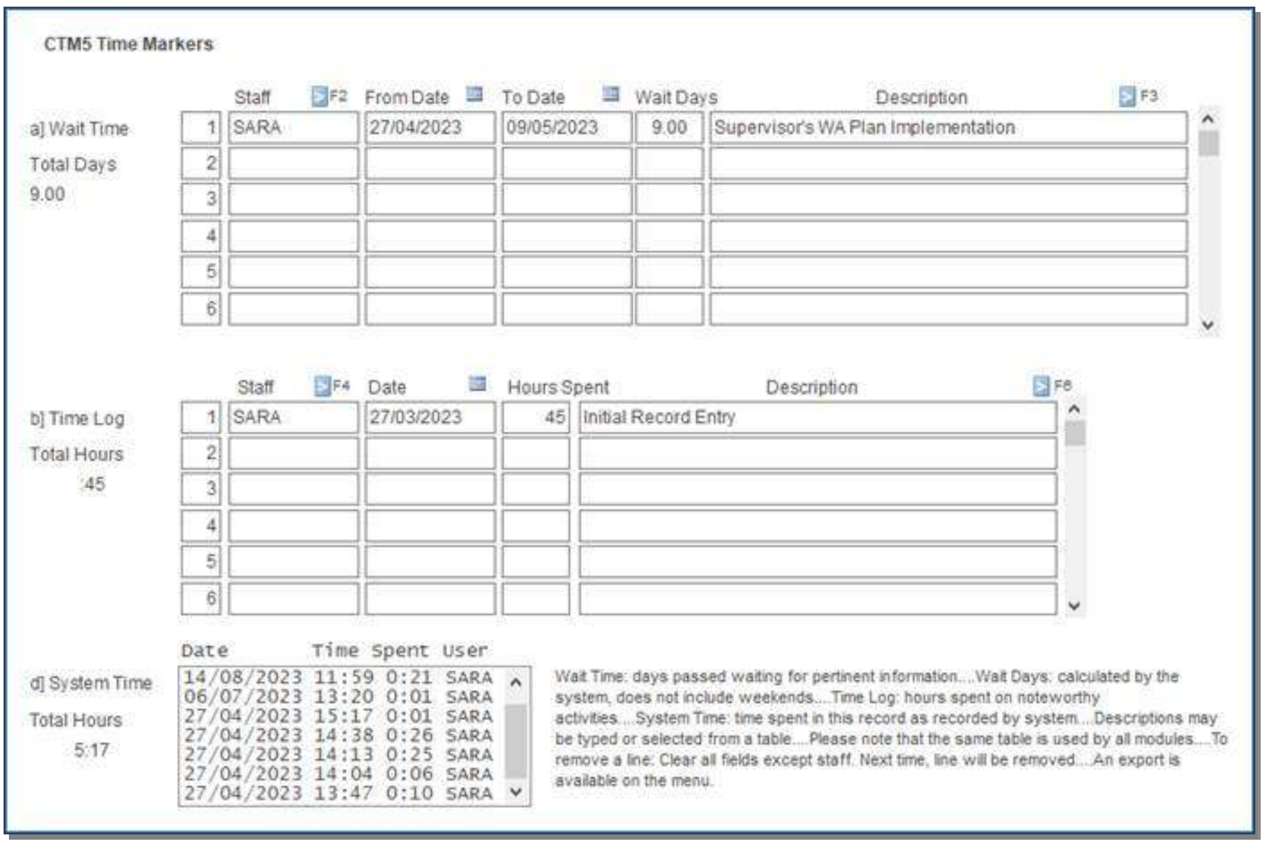
The Employee Records **In a Nutshell** provides the user with a one-page overview of an employee's current records from various modules. The modules included are Incident Reporting, Disability Management, Work Accommodation, Attendance Management and Chart.

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.



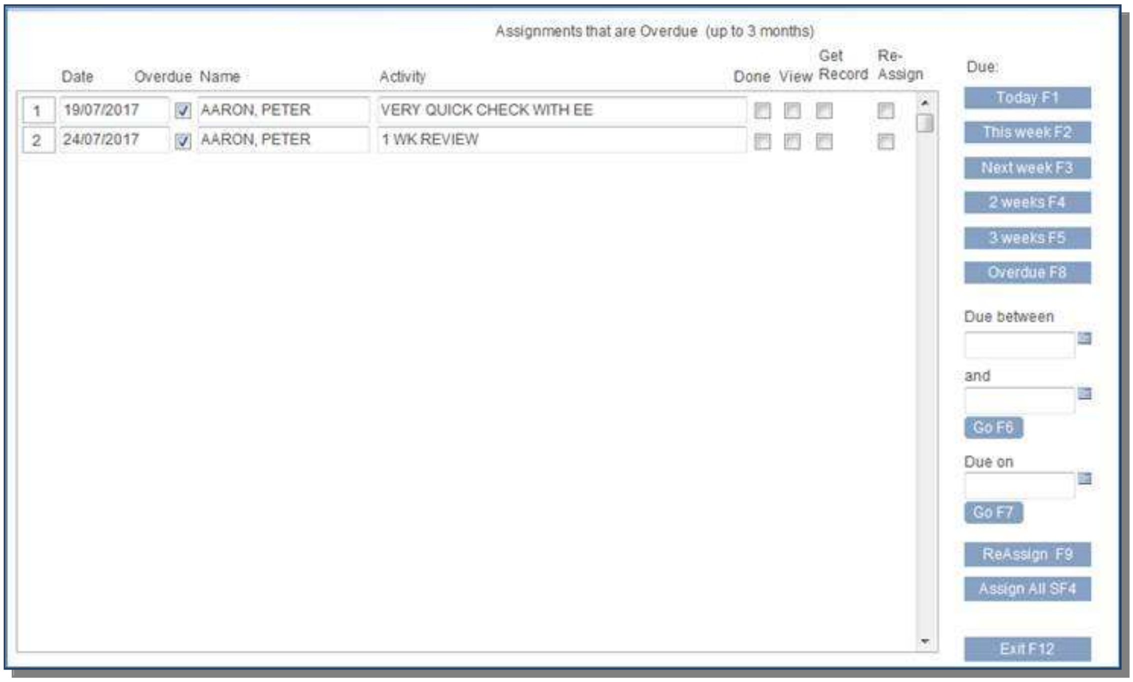
Time Markers

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.



Review Dates Worksheet

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



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.

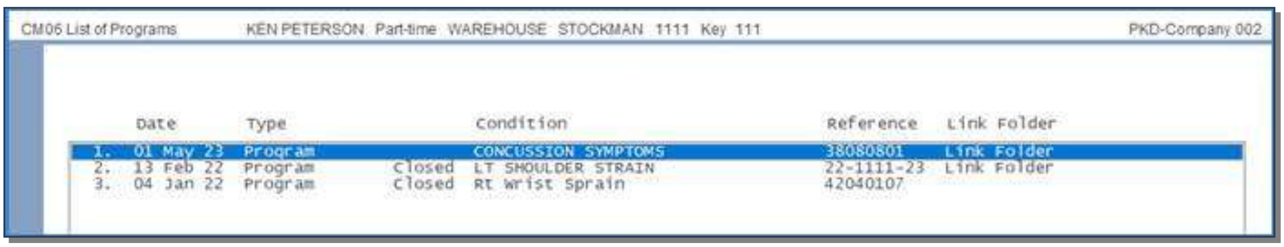
The **Reassign** check box, in conjunction with the **Assign F9** or the **Reassign All F14**, will allow the user to assign the review dates to another user one-by-one or on masse.

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.

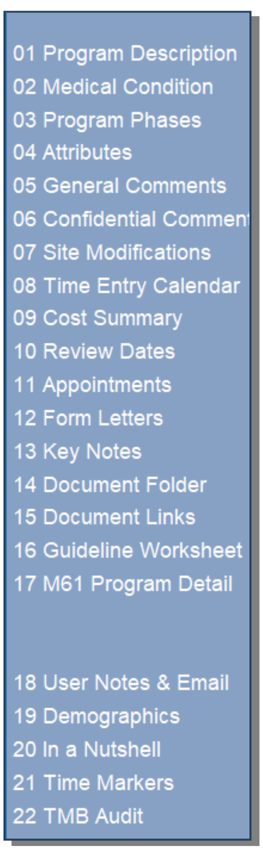
Opening an Existing Program

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.



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



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.

Reports Available In Work Accommodation

Manage-Program

M72 External Records Added

Reports

M62 Employee Calendar
M64 Register
M65 Progress Report
M66 Review Dates
M67 List of Programs
M68 Waiting Placement
M69 Program Duration
M71 Missing Fields
M6C Screen, Report Comments
M8T Activity based on Comments
M9A Appointments (Time Off)

Graphs

MHA Open RTW Programs
MHB Returned to Work Summary
MHC Program Status
MHD Restrictions
MHE Phase
MHF RTW Details
MHG Attributes and Programs

Attributes

M91 Statistics
M92 Totals by Month
M93 Employee List w/name
M94 Employee List wo/name
M9F Totals by attribute
M9K Totals this Month, YTD

Options

M31 Description Tables
M3A Table Counts
M20 Transaction Listing
MMD Audit Report
MMC Audit Export
M3K Temporary Staff Reassigns

Exports

M21 Export Txt File
M73 Export Link to Incident
M6D Cost Summary Export
M6E Site Modification
T9M Export Time Markers

** Option to Create Export File in Addition to Report

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