

Medical Surveillance Scheduler Training

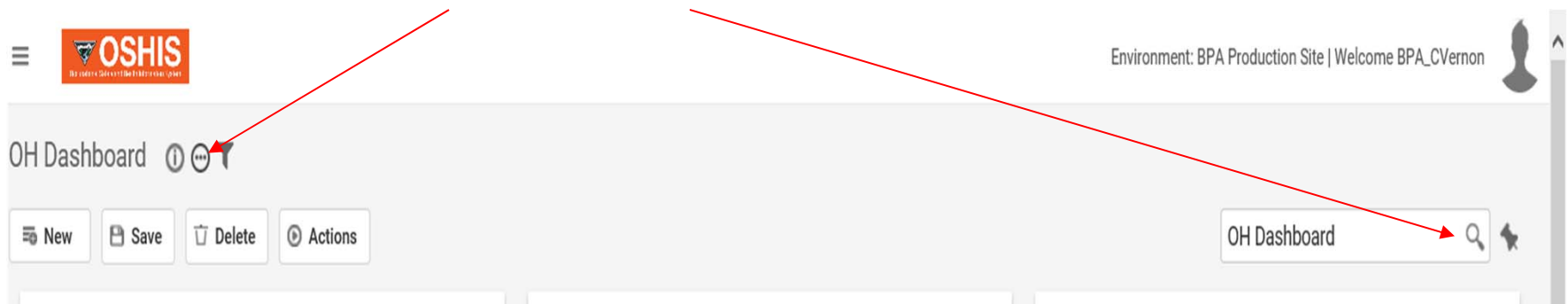


Medical Surveillance Appointments

- Each District Manager/Senior Manager is responsible for designating a Scheduler for their work group and communicating it to their work group
- Each district/work group is responsible for determining how they would like their surveillance appointments scheduled (i.e. who will schedule the appointments). However, it's proven to be a much more cohesive process if appointments are scheduled by the Scheduler, rather than the supervisor or employee. This helps to ensure that the correct tests are being scheduled, and the correct information is entered into OSHIS
- The Scheduler has access to view employees in surveillance, the surveillance they are due for and the date they are due. The Scheduler also has access to the approved Clinic List for appointments
- The Scheduler has access to the Appointments module in OSHIS. The Scheduler is responsible for entering all appointment information into OSHIS **prior** to an employees appointment. If the Scheduler is not the one scheduling the appointment, the person who does schedule the appointment is responsible for getting the appointment information to the Scheduler to enter into OSHIS

Locating your OSHIS Scheduler Dashboard

- Log in to Cority/OSHS: <https://bpa.cority.com>
Login Name: BPA email
Enter Password (If this your 1st time logging in click on the Forgot Password link, enter your BPA Email & look for an email to enter a password of your choosing)
- If your default view is not your Scheduler Dashboard, click on the 3 dots, then click on the magnifying glass that appears (Lookup Selector) and select your Organization's Scheduler Dashboard.
- Please do not try to create new dashboards.



OSHS Scheduler Dashboard Overview

Quick Overview:

- The “Appointments to Schedule” indicator lists the number of people you currently need to schedule an appointment for – they are either past due, due this month, or due next month
- The “Surveillance Due to be Scheduled” indicator informs you who is due, and what they are due for
Note: Scheduling an appointment is not necessary for Respirator User-Fit Test or Respirator User–Questionnaire. The supervisor is responsible for ensuring the Fit Tests are completed (in-house). Employees can locate the Employee Health History for Respirator Questionnaire when they log into MyCority/OSHS and submit it electronically.
- The “Employees in Surveillance” indicator lists all employees in your group that are in a surveillance program
- The “Clinic List” indicator lists all approved clinics for scheduling, sorted by state & city.

OSHS Scheduler Dashboard Overview

Employees due, & what they are due for

of people due to be scheduled

Link to Appointments module

OSHS

Environment: BPA Production Site | Welcome BPA_CVernon

Alvey District Scheduler Board

Attention Schedulers:
Please click on Appointments in My Favorites to report an employee's medical appointment.
If you have any questions please contact BPA Occupational Health at occupationalhealth@bpa.gov.
Helpful Hint: NO APPOINTMENT NEEDED FOR RESPIRATOR USER QUESTIONNAIRE OR RESPIRATOR FIT TESTING - THIS WILL BE HANDLED IN-HOUSE BY THE SUPERVISOR & EMPLOYEE

Alvey District: Appointments to Schedule

3
Count of Records

My Favorites

- Demographics
- Appointments
- My Email Log

Alvey District: Surveillance Due to be Scheduled

Employee Name	Supervisor	Surveillance Due	Expiration Date	Comments
Barrett, Patrick (0004802)	Coulombe, Dale (0000041)	Respirator User - Fit Test	06/20/2020	
Carter, Dennis (0011875)	Barrett, Patrick (0004802)	Respirator User - Fit Test	06/24/2020	
DeBaca, Troy (0003416)	Shiple, Gregory (0003737)	Respirator User - Questionnaire	10/10/2020	
DeBaca, Troy (0003416)	Shiple, Gregory (0003737)	Respirator User - Fit Test	03/13/2020	
Jones, Donald (0015684)	Coulombe, Dale (0000041)	Respirator User - Fit Test	03/13/2020	
King, Darryl (0014541)	Barrett, Patrick (0004802)	Respirator User - Fit Test	06/24/2020	
McConnell, Dennis (0000637)	Coulombe, Dale (0000041)	Noise Exposure	07/01/2020	
McCormick, Derick (0017784)	LeCompte Jr, Percy (0003507)	Respirator User - Fit Test	01/01/2019	
Meloy, Christopher (0005085)	Coulombe, Dale (0000041)	Respirator User - Fit Test	06/24/2020	
Miller, Joseph (0016350)	Shiple, Gregory (0003737)	Respirator User - Fit Test	03/13/2020	
Shiple, Gregory (0003737)	Coulombe, Dale (0000041)	Respirator User - Questionnaire	10/10/2020	
Shiple, Gregory (0003737)	Coulombe, Dale (0000041)	Respirator User - Fit Test	03/13/2020	
Smith, Randy (0004183)	Meloy, Christopher (0005085)	Respirator User - Fit Test	01/01/2019	

Clinic List - Scroll down for complete list

State	City	Description	Contact Phone
		N/A	
Idaho	Burley	Riverview Urgent Care, 382 N Overland Ave Burley, ID, 208-678-6996	208-678-6996
Idaho	Burley	WorkMed Clinic - Cassia Regional Medical, 1501 Hilland Ave #K Burley, ID, 208-677-6070	208-677-6070
Idaho	Burley	Hearing Life 1534 Overland Dr Burley, ID, 208-678-5200	208-678-5200
Idaho	Burley	Cassia Lab, 1501 Hilland Ave Burley, ID, 208-677-6490, LABS ONLY	208-677-6490
Idaho	Idaho Falls	Community Care East, 2725 Channing Idaho Falls, ID, 8448	
Idaho	Idaho Falls	Hearing Life, 19 St #119 Idaho Falls, ID, 208-522-3141	

OSHS Scheduler Dashboard Overview

Employees in your organization that are in medical surveillance

The screenshot displays the OSHS Scheduler Dashboard. At the top left is the OSHS logo. The top right shows the environment: BPA Production Site | Welcome BPA_CVernon. A sidebar on the right lists Oregon locations: Aloha, Coos Bay, and Eugene, with their respective addresses and phone numbers. The main content area is titled "Alvey District: Employees in Surveillance" and contains a table with the following data:

Full Name And Number	Job Position	Organization
Barrett, Patrick (0004802)	Supervisory Electronics Engineer	PSC Alvey
Bashor, Walter (0001712)	Temporary Lineman	TLM Alvey
Carter, Dennis (0011875)	Power System Control Craftsman II	PSC Alvey
DeBaca, Troy (0003416)	Electrician	Substation Maint Alvey
Eubanks, Alan (0005170)	Lineman	TLM Alvey
Foltz, Matthew (0009303)	Lineman	TLM Alvey
Girouard, Thomas (0005163)	Lineman	TLM Alvey
Jones, Donald (0015684)	Facilities Maintenance Worker	Facility Maint Eugene
King, Darryl (0014541)	Power System Control Craftsman I	PSC Alvey
Martinez, Vince (0004567)	Lineman	TLM Alvey

OSHS Scheduler Dashboard Overview: Surveillance Due this month or next

Full Name And Number	Supervisor	Department Description	Surveillance Due	Expiration Date
Andrews, Christopher (0015904)	Rehbein, Jennifer (0003102)	Corporate Safety	Respirator User - Questionnaire	03/30/2020
Bell, T (0003971)	Wright, Bradley (0012246)	Facilities Planning & Projects	Noise Exposure	03/14/2020
DiCaprio, Leonardo (2345678)	Vernon, Crystal (0010081)	Corporate Safety	DOT Medical Clearance	03/27/2020
DiCaprio, Leonardo (2345678)	Vernon, Crystal (0010081)	Corporate Safety	Lead Exposure	03/27/2020
DiCaprio, Leonardo (2345678)	Vernon, Crystal (0010081)	Corporate Safety	Noise Exposure	03/27/2020
Gosling, Ryan (0123456)	Vernon, Crystal (0010081)	Corporate Safety	DOT Medical Clearance	02/28/2020
Gosling, Ryan (0123456)	Vernon, Crystal (0010081)	Corporate Safety	Lead Exposure	02/28/2020
Gosling, Ryan (0123456)	Vernon, Crystal (0010081)	Corporate Safety	Noise Exposure	02/28/2020
Reynolds, Ryan (4567890)	Vernon, Crystal (0010081)	OS&H	Asbestos Exposure	03/20/2020
Reynolds, Ryan (4567890)	Vernon, Crystal (0010081)	OS&H	DOT Medical Clearance	03/20/2020
Reynolds, Ryan (4567890)	Vernon, Crystal (0010081)	OS&H	Noise Exposure	03/20/2020
Zuckerberg, Mark (1234567)	Vernon, Crystal (0010081)	Corporate Safety	DOT Medical Clearance	02/21/2020
Zuckerberg, Mark (1234567)	Vernon, Crystal (0010081)	Corporate Safety	Hazardous Material Exposure	02/28/2020
Zuckerberg, Mark (1234567)	Vernon, Crystal (0010081)	Corporate Safety	Noise Exposure	02/28/2020

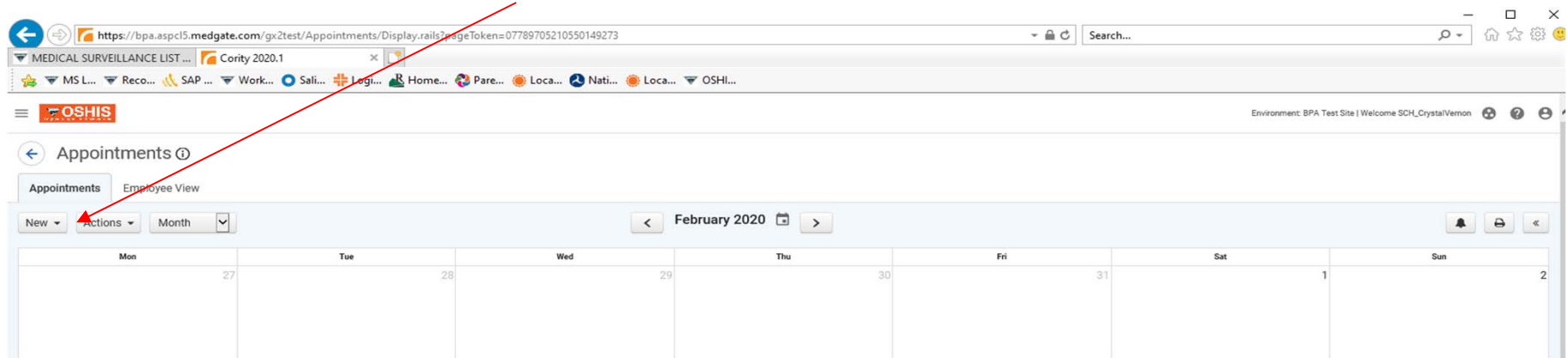
- C. Andrews is coming due for an updated Respirator Questionnaire - **no appointment needed** (grayed out)
 - T. Bell is coming due for Noise Surveillance
 - L. DiCaprio is coming due for a DOT Physical, Lead & Noise Surveillance
 - R. Gosling is coming due for a DOT Physical, Lead & Noise Surveillance
 - R. Reynolds is coming due for an Asbestos Physical, DOT Physical & Noise Surveillance
 - M. Zuckerberg is PAST due for a DOT Physical, and coming due for Hazmat Physical & Noise
- A total of 5 employees require scheduling right now.**

OSHS Appointment Scheduling

- Use the Clinic List on your Scheduler Dashboard to locate a clinic to schedule an appointment at. The list is sorted by state and city. Contact the clinic and schedule an appointment for the surveillance indicated in the “Surveillance Due to be Scheduled” indicator.
- The following information will help you notify the clinic what you need to schedule an appointment for (clinics have been provided these protocols):
 - **Lead Exposure:** Blood draw required (employee may decline by completing the Lead Declination available to them in MyCority)
 - **Noise Exposure:** Audiogram required
 - **DOT Medical Clearance:** DOT physical required prior to expiration date
 - **Respirator User – PFT:** Pulmonary Function Test required (breathing test)
 - **Asbestos Exposure:** Physical required, PFT required
Employee must complete and **print** questionnaires in MyCority, and **take** to their appointment (*Medical Surveillance Periodic Health Evaluation Form & Periodic Asbestos Medical Questionnaire*).
 - **Hazardous Material Exposure:** Physical required, PFT required, Lab work required: CBC, RBC, WBC, Chemistry Panel (BUN, Creatinine, ALT, AST, Glucose), Lead, Urine Dipstick (Specific Gravity, Protein Glucose, Blood), Urine Microscopy.
Employee must complete and **print** questionnaire in MyCority, and **take** to their appointment (*Medical Surveillance Periodic Health Evaluation Form*).

OSHS Appointment Scheduling

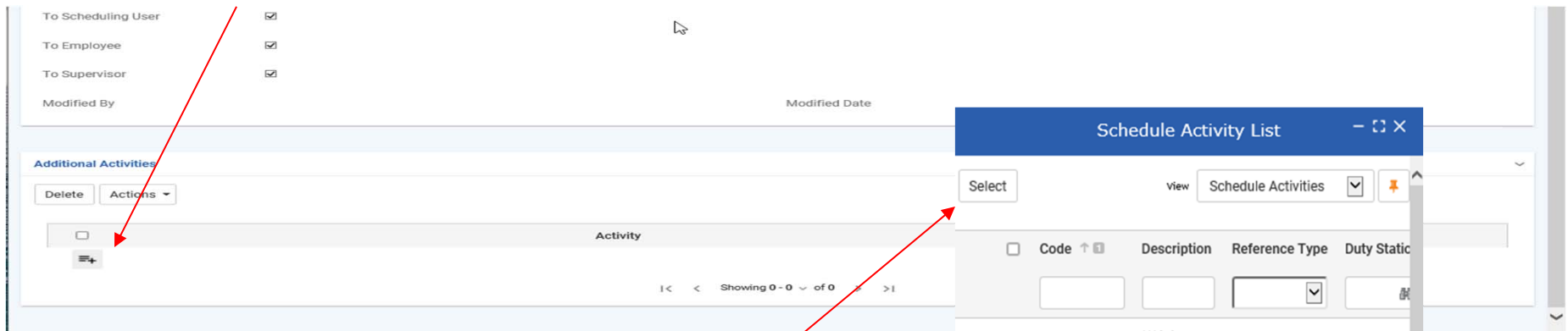
- Once scheduled, take note of the due surveillance items that you scheduled for (Lead, Noise, Asbestos, Hazmat, DOT, Respirator-PFT). You will need to enter this info into the appointment module.
- In the “My Favorites” box on your Scheduler Board, click on “Appointments”
- Click on “New”, then “Appointment”



- Enter appointment information into boxes 1 – 4, Clinic, Employee, Date of appointment, Time of appointment, Click “Save”. **Do not change what is already auto-filled in the box labeled Medical Surveillance**
- Scroll down, click on the following boxes to send notification/reminder emails:
 - To Scheduling User
 - To Employee
 - To Supervisor

OSHS Appointment Scheduling

- Scroll down, click on the “plus sign” at the bottom left of the page under Additional Activities



- Select all activities the employee is scheduled for at this clinic appointment, then click on “Select” in the same box

<input type="checkbox"/>	Code	Description	Reference Type	Duty Status
<input type="checkbox"/>	ASBESTOS	***Asbestos Exposure***		
<input checked="" type="checkbox"/>	DOT	***DOT Medical Clearance***		
<input type="checkbox"/>	HAZMAT	***Hazardous Material Exposure***		
<input checked="" type="checkbox"/>	LEAD	***Lead Exposure***		
<input type="checkbox"/>	Medical Surveillance	Scheduled Surveillance Appointment	Clinic Visit	
<input checked="" type="checkbox"/>	NOISE	***Noise Exposure***		
<input type="checkbox"/>	PRE-HIREASBESTOS	***Pre-HIRE Asbestos Exposure***		

OSHS Appointment Scheduling

- Scroll up, click on “Actions”, click on “Send Email Including Activity and Notes”, then close schedule entry

Schedule Entry ⓘ

Schedule Entry

New Save Delete Cancel Actions

Send Email Including Activity and Notes
Link
Copy

Layouts Schedule Entry (BPA-)

Details

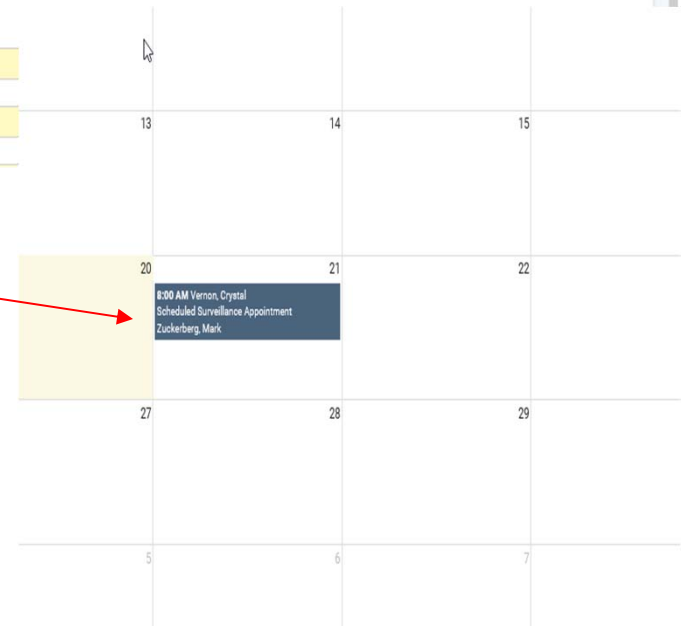
Instructions for creating a new appointment.

1. Enter information in all required fields, indicated by an asterisk (*).
2. Click Save.
3. Scroll down, Click on 3 boxes (To Scheduling User, To Employee, To Supervisor).
4. Scroll down, click on Additional Activities, click on the small plus sign, click on surveillance items due, click on Select.
5. Scroll up to top, click on Actions, click on Send Email Including Activity and Notes. Then close out.

Medical Surveillance * Scheduled Surveillance Appointment (Medical Surveillance)

Scheduling User * Vernon, Crystal (SCH_CrystalVernon)

- The employee’s appointment will now show up on the OSHS calendar, and notification emails will be sent to the employee, supervisor & scheduler. Reminder emails will also go out 3 days prior to the appointment



Documents Required for Appointment

The employee must take the following with them to their appointment:

- Any questionnaires required to be completed for Asbestos or Hazmat surveillance (employee can locate in MyCority)
- The Outlook email notification they received which lists all authorized tests required at their appointment – See example on next page

Note: The clinic will not be able to complete their surveillance if they do not arrive at their appointment with this information

Documents Required for Appointment

The screenshot shows an Outlook window titled "Appointment Request for Scheduled Surveillance Appointment - Meeting". The email header includes the sender "Provider <notification@cority.com>" and the recipient "Vernon, Crystal D (CONTR) - NFOS-MODW". The subject is "Appointment Request for Scheduled Surveillance Appointment". The email body contains the following text:

This is an automatic appointment request generated by your medical department from the Cority Environmental Health & Safety system for the following:
Activity: *****DOT Medical Clearance*****
*****Hazardous Material Exposure*****
*****Noise Exposure*****
Scheduled Surveillance Appointment
Date: 03/20/2020
Time: 8:00 AM (PST)
Appointment Scheduled With: Vernon, Crystal
Clinic: Performance Occupational Health, 11109 NE 14th St #A Vancouver, WA, 360-334-7001
Employee: Zuckerberg, Mark
Notes: EMPLOYEE MUST PRINT & TAKE THIS TO CLINIC FOR SERVICE. Clinic Authorization for activities listed above only. Return results via fax: 360-418-8574. Ordered by Dr. Greg Freed, BPA Medical Officer. Questions: 360-418-8537.

This appointment can automatically be added to your calendar by simply following the instructions below for either Outlook or Lotus Notes users.

Instructions for Outlook:

Please open the attached iCalendar file and either accept or reject the appointment.

Instructions for Lotus Notes:

1. Right-click the attached iCalendar file and choose View.
2. Click Import All and a new message will be sent to your Inbox.
3. Open the new message from your Inbox.
4. Click Respond button. A menu appears and click Accept or Reject.

Two red arrows point to specific parts of the email body. The first arrow points to the activity list (DOT Medical Clearance, Hazardous Material Exposure, Noise Exposure) with the annotation: "This tells the clinic what tests are needed when the employee arrives." The second arrow points to the "Return results via fax" information with the annotation: "This tells the clinic where to send results."

Additional Scheduling Information

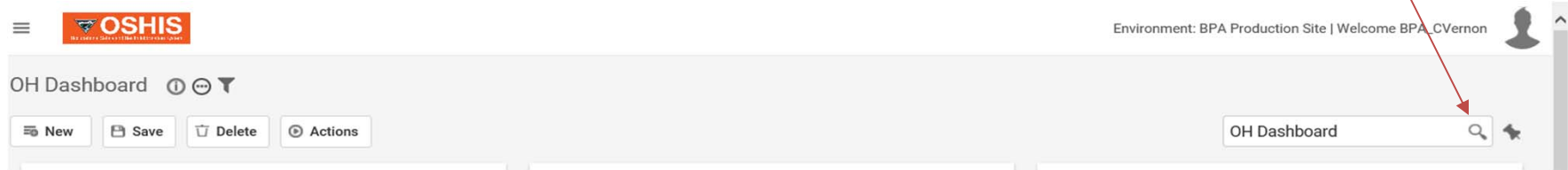
- To view your scheduled appointments, click here & select Month
 - Click on the arrows for filters, find your name & select it. You can also select the name of other schedulers in your group, to see all appointments scheduled for your organization
 - Click the magnifying glass, click on OHSCHEDULED, then SELECT in the top left corner. Click on the arrows again to close the filters.

The screenshot displays the OSHIS Appointments interface. At the top, there is a navigation bar with the OSHIS logo and the text "Environment: BPA Production Site | Welcome BPA_CVernon". Below this, the "Appointments" section is visible, with a "Month" dropdown menu set to "September 2020". The main area is a calendar grid showing appointments for various dates. On the right side, there is a "Filters" sidebar with a search bar and a "Schedule Status" filter set to "Scheduled". A red box highlights the search bar in the filters, and another red box highlights the "Scheduled" filter. Red arrows point from the text instructions to these elements.

Mon	Tue	Wed	Thu	Fri	Sat	Sun
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	

Additional Scheduling Information

If you are filling in for another district you can locate their Scheduler Board by clicking on the small magnifying glass in the upper right corner of your Scheduler Board, and then click on their Scheduler Board in the list.



Rescheduling an appointment:

- Find the appointment on the OSHIS calendar, double click on it.
- Enter in updated information
- Scroll up, click on “Actions”, click on “Send Email Including Activity and Notes”
- Close schedule entry

Canceling an appointment:

- Find the appointment on the OSHIS calendar, double click on it.
- Click on “Delete”, “Yes”