Medical providers make recommendations every day to employers regarding employee medical fitness. These recommendations are based on the practitioner’s clinical training and experience; however, there is often insufficient objective information available from about the workers’ physical ability to perform those requirements, thereby reducing the effectiveness and efficacy of the medical providers’ recommendations.

Chevron has developed a process for more accurately assessing medical fitness-for-duty based on the objective and specific physical requirements of individual jobs. The process includes job evaluation, medical exams, functional capacity evaluations (FCE), remedial action plans, and program evaluation that are applied to medical fitness determinations.

Chevron defines medical fitness for duty as a state of overall health that enables an employee to perform their job without risk to self, others and environment. This incorporates both physiological and psychosocial requirements of the job.

Focus areas for assessing medical fitness for duty include comprehensive medical history, general emotional well-being, active range of motion, strength, endurance, visual-perception, coordination, cardiovascular, cognition, dexterity and balance. Additionally for a more complete picture of the occupational setting, a functional capacity evaluation benchmarks the applicant/employee’s present status and physical capability to perform the essential functions of a validated job position or job category. This information supplements the clinical assessment of the examining or treating physician.

The physician uses their clinical assessment and the results of the FCE testing together to provide the client company with objective medical recommendations regarding the examinee’s medical suitability to perform the job requirements. When warranted, additional referral to other health specialists (e.g. cardiology or neuropsychology) may be indicated.

It is critical to develop and consistently implement all aspects of a medical fitness for duty program to ensure success and the benefits of the program. Key implementation steps include:

• Assess the cost v. benefits of the program
• Establish a team to develop the medical fitness for duty program and oversee local implementation: line management, safety, human resources, labor and union relations
• Decide which job classifications will be included
• Develop a request for proposal and select vendors
• Perform job evaluations and validate job descriptions
• Design the testing protocols/FCE testing content
• Develop job specific physical conditioning programs
• Determine the medical exam content and frequency
• Evaluate healthcare providers
• Leverage material previously developed and in use
• Develop administrative procedures
• Coordinate communication issues

To reinforce the importance of job analysis and validation, the following are critical considerations to properly documenting the specific physical requirements and working conditions of the job position:

• Create an accurate functional job description
  • Notify union of intentions
  • Questionnaires completed by employee and supervisor
• Compile questionnaires and review with employee and supervisor
• Observe employee work tasks and videotape tasks as needed for clarity and post-assessment review
• Perform activity analysis and quantify physical, cognitive and psychosocial demands
• Validate new job description:
  • Review new job description with union representative, employee, supervisor and manager and obtain commitment that job description is accurate
  • Have all members who review the job description sign off and endorse its accuracy

Two other areas merit additional discussion: communicating recommendations based on the results of the FCE and directing the next steps for the examinee. The FCE test is by its very nature a snapshot in time: it objectively documents the examinee’s physical capacity to perform the job specific requirements of the job position. If an individual does not meet one or more essential job requirements of the position, objective medical recommendations are provided to Human Resources and Management regarding medical fitness for duty and job specific limitations.

Human Resources and Management have the ultimate decision authority to determine if the individual is medically fit for work, if job modification is required, or if a job search should be undertaken for a different job position for which the examinee is medically fit with the recommended limitations and restrictions. For his/her part, the examinee may benefit from work conditioning or work hardening programs designed to increase their physical capacity to perform the essential functions of the job position.

Work conditioning and work hardening may include cardiovascular training, muscle strengthening, flexibility training, simulated/actual work tasks, focused intervention, Employee Assistance Program (EAP) counseling, health and wellness professional counseling, and/or skilled therapy intervention. Individuals who undergo work conditioning or work hardening must continue with these programs for a minimum of 2 - 4 months prior to re-evaluation.

REFERENCES