

Letter from the Editor

Dear Readers,

Welcome to the Summer 2007 edition of Presagia's newsletter, providing you up-to-date health and productivity management advice and the latest news. The past few months have continued to show increased interest in workforce health and productivity. As companies providing best-in-class programs are beginning to experience positive outcomes, the art of health and productivity management is being validated and becoming a strategic business process. In Towers Perrin's 2007 Health Care Cost Survey, it was reported that health care expenditures were projected to rise by \$518 (6%) per employee in 2007. However, the report noted that there was about a \$3,000 difference between low and high cost companies. One primary reason for this difference was the level of involvement in managing health and health benefits, with low cost companies more apt to take an active and decisive role. This and other more recent reports signify that health and productivity management is well on its way to being an integral component of business management.

We at Presagia are proud of our involvement in this trend and through this newsletter hope to offer you some practical best-practice advice will help you to obtain more value from your organization's health and productivity programs. This edition focuses on two specific topics - effective health and productivity data management and improving return to work outcomes with an innovative task bank system.

As always, we welcome any questions, ideas and feedback. You can reach us at: info@presagia.com.

Sincerely,

Geoffrey Simpson
Marketing Manager

The Task Bank – Crucial for a Successful Stay at Work/Return to Work Program

By Robert Hall, Ph.D., CDMS, CRC and Peter Davie, M.S., CRC

Stay at Work/Return to Work (SAW/RTW) programs are used by many employers to address workforce productivity, health costs and lost time related to medical issues. It is a collaborative process designed to progressively return an employee to their full work capacity following a medically related incident. The approach utilizes holistic case management and focuses on identifying an employee's current abilities to match them to intermediary transitional assignments. The goal is to keep the employee engaged

and thus promote a faster recovery and control costs. The ACOEM Guidelines – Preventing Needless Disability elaborate on the necessity for this approach:

Studies have shown that the odds for return to full employment drop to 50-50 after six months of absence. Even less encouraging is the finding that the odds of a worker ever returning to work drop 50 percent by just the 12th week.

The identification of tasks and jobs that the employee is able to perform given his/her medical restrictions is integral in a successful SAW/RTW program. As such, the "task bank" – a listing of previously identified tasks in various departments within a company – is a vital tool for the SAW/RTW manager. The task bank

supports efficient and appropriate matching of work that needs to be done to an employee's current abilities. This article examines various important elements during the creation and management of a best-practice task bank. ([Continued on Page 3](#))

4 Questions to Start the Path to Effective Health & Productivity Data Management

A few years ago workforce health and productivity management (HPM) was a fringe concept with a small following that recognized its potential to be a strategic business initiative. Due to rising health costs and increased productivity demands, this concept is now becoming a best-practice workforce management strategy being adopted by many large employers.



Jim Winkler, a practice leader of the Health Management Consulting practice at Hewitt recently stated, "Employers are applying a risk management mind-set to the asset that is employee health." In this discussion we examine the many sources of health and productivity data and the next steps needed to better manage and analyze it. Data capture, management and analysis is an integral part of every organization's ([Continued on Page 5](#))

Table Of Contents

| | |
|--|---------------|
| <i>Letter from the Editor</i> | <i>Page 1</i> |
| <i>The Task Bank – Crucial for a Successful Stay at Work/Return to Work Program</i> | <i>Page 1</i> |
| <i>4 Questions to Start the Path to Effective Health & Productivity Management</i> | <i>Page 1</i> |
| <i>Upcoming Events</i> | <i>Page 2</i> |
| <i>Presagia In the News</i> | <i>Page 2</i> |
| <i>Contact Us!</i> | <i>Page 7</i> |

Events

Presagia presented “Ramping Up Case Management for the 21st Century” at the recent DMEC (Disability Management Employer Coalition) Annual Meeting!

On July 17, Presagia co-presented with CQS-Consulting Group and Chevron Corporation at the DMEC Annual Conference. The session, “Ramping Up Case Management - Innovations for the 21st Century”, overviewed emerging Absence & Disability Case Management (including Return to Work) practices. As well, several years of employer outcomes were provided, key best-practices identified and state-of-the-art technology to support these were detailed. Attendees learned techniques that have the potential to turn traditional programs into strategic business operations with measurable results.

Presagia will also be at the following upcoming events:

September 16 - 19

Disease Management Leadership Forum and DMAA-NAM Integrated Care Summit, Presenter

October 1 - 3

HERO (Health Enhancement Research Organization) Forum for Employee Health Management Solutions, Member/Attendee

October 17 - 19

IHPM (Institute for Health & Productivity Management) Annual International Conference, Exhibitor

October 23 - 25

NBGH (National Business Group on Health)/IBI (Integrated Benefits Institute) Joint Forum on Health, Productivity & Absence Management, Exhibitor

November 6 - 8

National Workers' Compensation & Disability Conference, Exhibitor

Moore Orthopaedic Clinic Leverages Presagia Technology To Create 15,000 Athlete Health Records

It was with great pleasure this past March that Presagia announced the signing of a contract with Moore Orthopaedic Clinic of South Carolina for the deployment of Presagia Sports. This comes at a time when leading sports medicine providers are realizing the significant value to be gained from implementing web-based health information management systems incorporating Athlete Health Records.

Delivering quality sports medicine outreach services across the Midlands of South Carolina to all types of athletes, from professional and college level players to little leaguers, requires Moore Orthopaedic Clinic to be at the top of its game all the time.

Recognizing the crucial role health information management plays in the care process, Moore Orthopaedic Clinic turned to Presagia Sports to centralize and streamline its processes. This system will empower Moore Orthopaedic Clinic's sports medicine team with anytime, anywhere online and offline access to complete athlete health information, health management tools, and decision-support resources. Furthermore, Moore will join a growing number of health innovators adopting Electronic Health Records (EHRs) by creating 15,000 Athlete Health Records within the Presagia system. “Since opening our doors in 1928, Moore Orthopaedic Clinic has maintained a spirit of innovation first instilled by our founder Dr. Austin T. Moore, a leading orthopaedic surgeon,” says Dr. Wendell Holmes, M.D., of Moore Orthopaedic Clinic. “We are proud to continue that trend as we now implement state-of-the-art health information technology to support our care processes.”

“In the highly competitive sports environment it is critical for athletes to be returned to competition quickly and safely,” explains Dr. Frank Noojin, M.D., of Moore Orthopaedic Clinic. “Utilizing Presagia Sports is about providing our medical team technology that enables them to deliver faster, more effective care on and off the field, thus supporting expedited recoveries.”



“Recently some employers have gained widespread recognition through a series of highly publicized electronic health record initiatives,” states Rick Bercuvitz, Chief Operating Officer of Presagia Corp. “These employers should be looking for guidance from leading sports organizations like Moore Orthopaedic Clinic that have already implemented health information technology to provide higher quality, streamlined care to athletes. We are proud and excited to work with Moore Orthopaedic Clinic on this initiative.”

Presagia Sports (www.presagia.com/solutions/sports/presagiaSports.html) seamlessly connects medical personnel and training support staff with instant web-based access to comprehensive athlete health information in a centralized system. The resulting communication and collaboration improves workflow efficiencies and reduces redundant data-entry to facilitate effective athlete health management. Simultaneously, Presagia Sports supports in-depth trend analysis for the development and implementation of proactive medical and training strategies to promote, maintain and enhance athlete health.

To view the full press release, please go to www.presagia.com/news/press/2007/mooreClinic.html



The Task Bank – Crucial for a Successful Stay at Work/Return to Work Program

(Continued from Page 1)

Developing the task bank is usually the responsibility of the disability or SAW/RTW management team. Although one of these teams will be responsible, it will be important for them to reach out to a number of other groups, one being supervisors and managers. As the primary stakeholders responsible for updating available tasks and their descriptions, they need to understand and support the system. As well, in order to get them using the system, it must be aligned with the processes of their departments – supervisors and managers can help define these requirements. In the ideal world supervisors and managers would be instantly open to helping with the development and ongoing maintenance of a task bank, however actually gaining their trust and cooperation can often be difficult for some of these reasons:

- Reluctance to have someone in their departments or on their teams who is not “100 percent”
- Fear of the person becoming re-injured
- Concern that other employees will react negatively to someone performing partial duties.

To overcome these, they should be shown how the creation of a task bank addresses the issues directly. First, because the managers and supervisors are themselves identifying tasks that need to be done, they ensure an employee in a transitional assignment is doing meaningful work that helps the team. Secondly, by matching the employee’s abilities with specific tasks, the potential for re-injury is minimized. Thirdly, a simple, defined process to update tasks can overcome resistance to the new responsibility and increase enthusiasm – in reality every department has tasks that need to be done and reluctant supervisors and managers should quickly realize this. Lastly, their input in the development phase gives them a sense of control over the program in their departments, increasing responsibility and accountability.

Upper management support is another critical component in the development of a task bank system. Often viewed as another business expense with vague ROI, you will need to present a strong business case demonstrating the cost-benefit ratio of the proposed task bank solution. This should look at such areas as health costs, indemnity costs, estimated productivity losses, lost days and more, and compare them to the cost and time that will be spent on the task bank. Buy-in from upper management is important because directives and support from the top will demonstrate that SAW/RTW is now a part of the corporate culture.

As well, motivating employees to want to return to the workplace early is an important factor. In most workplaces employees feel that when they are injured or ill and have a doctor’s note to stay home, they should unquestionably do so. In truth though, a best-practice SAW/RTW program will allow the employee to re-start work on a limited basis and progressively return to their original job assignment. This is beneficial therapeutically and economically. As mentioned previously, the longer an individual is away from the workplace after an illness or injury, the slimmer the chances are that the person will ever return to work. (Continued on Page 4)

The Task Bank – Crucial for a Successful Stay at Work/Return to Work Program (Continued from Page 3)

Some benefits that can be conveyed to employees are:

1. By performing a transitional work assignment the employee can maintain more of his/her full salary and benefits.
2. Returning to the workplace maintains an important social and emotional connection for many people - they can feel productive through their interactions with others.
3. Remaining engaged overcomes the psychologically detrimental disability mindset.

Once the task bank system has been effectively sold to the various stakeholders, some fundamental processes must be instilled. Transitional assignments should be viewed as an interim step in the physical recovery process. With that in mind, a best-practice is to utilize transitional work assignments in a progressive fashion, consistent with functional improvements. A good process for identifying transitional tasks is:

- Look for tasks that are not getting done now
- Look for tasks that regular workers do not have time for
- Look for projects that need to be done
- Look for tasks that would free up regular employees' time
- Look for tasks are valuable to your department
- Look for tasks to meet your business needs

Managing the transitional return to work process is a critical aspect of effective case management and the team should closely monitor medical recovery to ensure the transitional assignment is always consistent with the workers' current functional abilities. Utilizing available technologies to initially select the most appropriate assignment and continually manage the process can be highly beneficial to facilitating the overall process and lead to a more timely return to productivity on the part of the employee."

Starting a task bank is a collaborative effort that requires input from supervisors and managers, human resources, disability and return to work managers and potentially others. In addition to properly identifying task opportunities, some basic information will need to be captured for each task. This information can vary some depending on the type of jobs involved, industry, etc., but should typically include:

- Task name and description of duties
- Location (department, facility, etc.)
- Work hours
- Name of supervisor/manager and contact info
- Detailed description of physical and mental work requirements that can be matched to a given employee's functional capacities

Once the system is set up, the disability manager or SAW/RTW coordinator should maintain regular communication with all parties involved to ensure the task bank is updated regularly (this can be supported with software that enables quick online task updating). One reason this is important is because in some cases the disability or SAW/RTW coordinator will have to look outside an employee's department to arrange a transitional assignment.

Putting together a transitional assignment on an ad hoc basis is time consuming and burdensome for all involved, however with advance planning the employee's abilities can be easily matched to tasks that need to be done in other departments. For example, an industrial worker who cannot return immediately to his or her regular department may be able to perform non-physically demanding work in another department, such as quality control and inspection, shipping and receiving or research and design.



The task bank is at the heart of the best-practice SAW/RTW program as properly matching injured and ill employees is crucial to the process. A well-defined, efficient and planned task matching process can help to ensure ongoing support for the SAW/RTW approach. The task bank has the potential to change the work injury/illness culture from one of disability to ability, thus creating a fundamental shift in thinking that focuses on the positive and can generate huge economic and social benefits for the employee and employer. If you would like to further discuss this topic, please do not hesitate to contact Robert Hall at bhall@presagia.com.

Written by Robert Hall, Ph.D. CRC, CDMS

Dr. Hall has worked in the Absence and Disability Management and Rehabilitation fields for over 25 years and is currently the Director of Business Development at Presagia Corp. Prior, he was a co-founder of AtWork Resources (acquired by Presagia in 2006), developer of the AtWork Manager software. In his career, Dr. Hall has consulted with and provided training and consulting to a variety of employers and health and human service organizations in the areas of disability management, the ADA, and Stay at Work/Return to Work programs. Dr. Hall has lectured nationally and internationally and has written a variety of articles and papers on the above topics. He is also an Adjunct Professor in San Diego State University's graduate Rehabilitation Counseling Program.

Reviewed by Peter Davie, M.S., CRC

Mr. Davie has provided consulting and accommodation services to employers with health and productivity needs for the past 28 years. He is currently the Director of Enterprise Solutions at Presagia and a Principal of Peter Davie Associates. He has spoken nationally on absence/disability management and has worked with numerous organizations.

4 Questions to Start the Path to Effective Health & Productivity Data Management
(Continued from Page 1)

central strategy and as competition and complexity in the business ecosystem increase so does the need for comprehensive, standardized and reliable data. Today organizations employ a variety of data management strategies, often leveraging many technology solutions to achieve their goals. Among the technology solutions, which include Customer Relationship Management, Supply Chain Management and Risk Management systems are Human Resource Information Systems, designed to broadly facilitate important aspects of human capital management. These systems have transformed HR departments, empowering everyone involved with an efficient means to capture, manage and analyze data relevant to their role. As a result, HR managers and directors have been able to increase overall HR efficiency and implement measures to promote ongoing analysis and improvement.



The caveat is that HRIS solutions are usually limited to managing the core components of HR – benefits and compensation, payroll, time and attendance, etc – and health and productivity management are overlooked. This is a critical problem because it is a highly data driven process that necessitates organization-wide collaboration and sharing of information. Furthermore, as an emerging discipline, it requires constant program analysis and feedback to develop best practices.

Currently the HPM market is generally characterized by a variety of technology and human-based solutions managing specific components of health and productivity. Disease management vendors manage individuals with long term diseases, wellness companies handle health promotion initiatives such as fitness or weight management, case management providers facilitate employee health management and so on and so forth. In some cases these overlap, for instance disease management vendors may have a wellness division. However in most cases the data relating to each process is contained within its own silo and managed by a unique technology solution. As a result, cross-program, population-wide and other macro level analytics are too time consuming, difficult and costly to produce.

To delve deeper and enable greater analytical possibilities, there are questions each organization can ask:

Where does health and productivity data come from?

Every organization has its own mix of health and productivity programs and systems. The key when searching for a solution to integrate these will be to find one with the flexibility to interface and exchange data with this diverse system set. To approach this search in an informed and logical manner, an organization must first identify its many sources of health and productivity data.

How does each health and productivity stakeholder manage data?

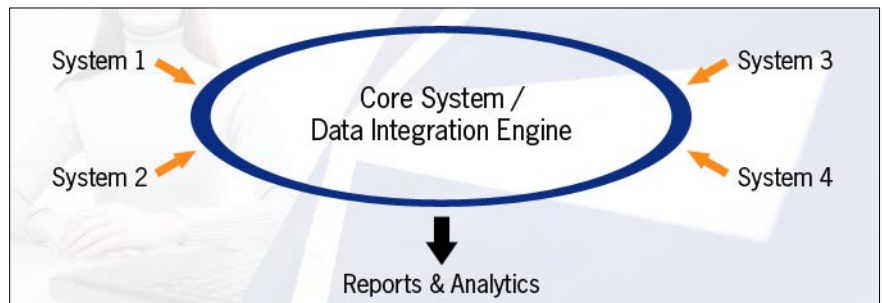
Once the sources of data have been identified it is important to know how each source manages it. Each source will most likely utilize its own solution – be it a software package, web application, paper filing system or something else – and as such will require a different data exchange process. The complexity for this can be overwhelming; however, approaching the problem with a clear understanding of all of the challenges helps find a solution.

How can data be exchanged between systems?

With all data sources determined, it is time to look at how the data is going to be exchanged. A significant challenge is to determine the potential for each system to export data to, and receive data from, other systems. In general, computer and web-based systems will be able to exchange data using at least one standardized format (e.g. XML, CSV, plain text), however most likely not all will support the same standardized format. As well, if some of the systems identified are paper-based, the organization will need to find some way to capture that information digitally. Mapping out the means of exchanging data between systems will lead you to the question below. This is a crucial question to ask and could lead an organization to realize systems/vendors are not managing data effectively and should be asked to change or be replaced.

Does one system have the potential to facilitate data exchange and aggregate reporting?

Once the organization has mapped out how data can be exchanged, it should be readily apparent that making individual connections between each system is complex and costly. Developing the initial interfaces is challenging enough, but as the applications continue to grow and mature, maintaining those interfaces becomes more time consuming and expensive. As a result the next step should be to determine if one of the existing systems could act as a central repository to facilitate data exchange and analysis. If this is not possible, then the organization should invest in a new system that can support holistic integration.



Data management is a valuable business practice that must be approached logically with strategic planning. When properly applied to HPM best practices, organizations can put their data to use, analyzing trends, developing best practices, evaluating cross-program relationships and more. The questions above can help an organization take the first steps towards more effective health and productivity management. If you would like to further discuss this topic, please feel free to contact me at gsimpson@presagia.com and I can refer you to an integration expert on our staff.



PRESAGIA Newsletter
Promoting Health Management Intelligence



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Presagia develops innovative health and productivity management software solutions for employers, healthcare practitioners and athletics organizations worldwide. Our user-friendly solutions support cost-effective integration of diverse processes, systems and stakeholders to improve communications, streamline workflows and provide real-time information and analytics. The result is strategic, collaborative management to control health costs, reduce lost-time, increase productivity and improve overall wellness.

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