Standard Operating Procedure for Medical Monitoring

1. Scope

This document is a standard operating procedure (SOP) for the Medical Monitoring (MM) Program in the DEP Laboratories. The SOP covers some of the rules and procedures the laboratory uses for beginning, maintaining and ending employee medical monitoring in the Adobe LiveCycle Program. This SOP will also cover employees who move from one position to another and addresses invoice processing. Refer to DEP 477 and Contract ADM740 for explicit details not covered in this SOP.

2. New Employee entering the Medical Monitoring Program

A new employee entering the Medical Monitoring Program should have an electronic Medical Monitoring Justification form (DEP 54-404) completed through Adobe LiveCycle (LC).

a) How to Enroll a New Employee:

- Check to make sure the new employee's position number is on the MM Participant's List.
- Using WORD, complete the Job Safety Analysis (JSA) and send to Nhon Vo to sign, date and return to you.
- In LiveCycle click on Start Process, click Medical Monitoring Forms and complete MM Justification form (**as the manager)**. Make sure you have all the necessary forms scanned and ready to attach. When completed "save" and "submit".
- It will route back to you as the **MM Representative**. Check the form for accuracy, save and submit to the **Division Director**, Julie Espy, for approval. It will then be routed to the **HR Employee Relations Coordinator**, Donald Coker, who will review and approve the form.
- Check LiveCycle daily for any notices that will be sent to you for MM processing.
- Once the approvals are obtained, the **MM Representative** will receive a notice in LiveCycle to **set up an appointment** for a MM Baseline Exam with Dr. MacKay.
- You will then need to do the following:
  - send an email to Shamika@drmackay.com for exam dates for the month needed.
  - update the Participant's List and prepare an email and send dates to the employee.
  - employee is to send back their two date choices. Forward them to Shamika and she will email you the exam date that has been reserved for the employee.
  - send an email of confirmation to the employee and their supervisor of the reserved exam date.
  - prepare a manila folder with forms, 54-405, 54-406, 54-407 and have the employee complete the grayed area on the forms. They need to be returned to you a couple days before the exam date.

The OFFICIAL COPY is the on-line version. All other copies are considered unofficial and uncontrolled

- scan and send the MM exam forms to Shamika before the scheduled exam.
- communicate to the employee: appointments are considered work time; there is fasting needed; there is a penalty for missing the appointment.
- add the new employee to the **MM Participant's List** and prepare an E-folder for the employee and save in the **Participant's "E" folder**. Use **ADM (fldep1) (V:) Medical Monitoring – Medical Monitoring Group DEAR.**
- Sometime after the exam is completed Dr. MacKay's Office will email the **MM Representative an Invoice and Clearance Statement.**
- Stamp the date received on the forms. File in electronic **Participants E-folder**.
- Send an email to the Lab Budget Coordinator with forms attached to Set-up for Payment using LC Contract Invoicing Form 55-263A. She will send you an email when form is sent to the MM Coordinator, Don Coker and when it has been paid by Finance and Accounting.
- Update the **Participant's List** with the next exam date that is two years from current date unless otherwise specified. Make sure all forms are in the Participants E-folder.

3. Exit an Employee from the Medical Monitoring Program

a) How to Unenroll an Employee:

- When an employee vacates a position that has been medically monitored a physical exam is required unless the last medical monitoring exam was conducted within six months prior to the date the employee is vacating the position. ***Note****: if an employee does not elect to have an* ***Exit exam****, they must complete the MM Exit Physical Waiver form DEP 51-009 (include a copy in the Participant's folder) and submit it to you. No MM exam is needed so proceed with completing a MM Justification form only.*
- In LiveCycle click on Start Process, click Medical Monitoring Forms and complete MM Justification form (**as the manager)**. Choose **Unenroll** and proceed to fill out the rest of the form. Make sure you have all the other necessary forms scanned and ready to attach. PD "Incumbent" shows "**vacant**". When completed "save" and "submit".
- It will route back to you as the **MM Representative**. Check the form for accuracy, save and submit to the **Division Director**, Julie Espy, for approval. It will then be routed to the **HR Employee Relations Coordinator**, Don Coker, who will review and approve the form.
- Check LiveCycle daily for any notices that will be sent to you for medical monitoring processing.
- Once the approval is obtained, the **MM Representative** will receive a notice in LiveCycle to **set up an appointment** for a **MM EXIT exam** with Dr. MacKay. (*This will not apply when a Physical Waiver form has been submitted by an employee).*
- You will then need to do the following:
  - send an email to Shamika@drmackay.com for exam dates for the month needed.
  - update the Participant's List and prepare an email and send dates to the employee.
  - employee is to send back their two date choices. Forward them to Shamika and she will email you the exam date that has been reserved for the employee.

The OFFICIAL COPY is the on-line version. All other copies are considered unofficial and uncontrolled

- send an email of confirmation to the employee and supervisor of the Exit exam date.
- prepare a manila folder with forms, 54-405, 54-406, 54-407, and an Exit Memo in lieu of the Physical Waiver form for the employee who is leaving the program.
- the employee completes the grayed area on the forms. They need to be returned to you a couple days before the exam date.
- Scan and send the MM exam forms to Shamika before the scheduled exam.
- Communicate to the employee: appointments are considered "work time"; there is fasting needed; there is a penalty for missing the appointment.

b) Update the **MM Participant's List** with any new information.

Use ADM (fldep1) (V:) Medical Monitoring – Medical Monitoring Group DEAR.

- Sometime after the exam is completed, Dr. MacKay's Office will email the **MM Representative an Invoice and Clearance Statement.**
- Stamp the date received on the forms. File in electronic **Participant's E-folder**.
- Send an email to our Lab Budget Coordinator with forms attached to Set-up for Payment using LC Invoice Approval form 55-263. She will send you emails when the form is sent to the MM Coordinator, Don Coker and when it has been paid by Finance and Accounting.
- Update the **Participant's List** as **VACANT** for the position and take the exiting employee's history and move it to the MM Participant's folder for **Lab Staff Deleted** from the MM Program

4. Continuing an Employee in Medical Monitoring

a) At the beginning of each month, check the Participant's List to see who needs to be scheduled for Medical Monitoring. Most employees are scheduled on a *biennial* basis unless otherwise instructed. When an appointment has been confirmed, update the Participant's List with the date and time of the appointment, then email the employee and the supervisor. A read receipt should be requested. This email should include the appointment date and time, the restrictions of the appointment, paperwork pick-up information and needs to communicate the penalty of missing an appointment.

b) The date and time of the appointment should be written in and the box for "Periodic" checked on the form. The forms needed for the appointment include a DEP Medical Surveillance Program Form (DEP 54-405), a Medical Clearance Statement (DEP 54-407) and a Hearing Conservation Form (DEP 54-406) and can be found at https://www.fldepnet.org/fdep-forms-list. The paperwork for the appointment remains blank except for the grayed areas that the employee must fill out completely and return to their MM representative. The MM forms will be sent electronically to Shamika Benjamin at Dr. MacKay's office before the appointment date. An employee will not be seen if the electronic forms are not received by Dr. MacKay's office prior to the appointment and will result in a missed appointment penalty.

The OFFICIAL COPY is the on-line version. All other copies are considered unofficial and uncontrolled

5. Moving Employee from One Position to Another

a) An employee that changes from a position that is medically monitored to another position that is medically monitored must have a new MM Justification Form (DEP 54-404) filled out with attachments in LiveCycle. LC will route the electronic form for signatures through the MM Program **Division Director**, Julie Espy, for approval. It will then be routed to the **HR Employee Relations Coordinator**, Don Coker, who will review and approve the form. An electronic copy should be saved under each employee Participant's E- folder along with the *new* JSA and the new position description.

b) An employee that moves from a position that is medically monitored to another that is not in the MM Program, you will use the MM Justification Form (DEP 54-404) in LC and the procedures to **Unenroll** from the program.

c) An employee that moves from a position not medically monitored to another that is medically monitored, you will use the MM Justification Form (DEP 54-404) in LC and the procedures to **Enroll** in the program.

6. Medical Clearance Statement

A medical **clearance statement** will be received by the Lab office MM Representative after the MM exam has been completed. Stamp the received date on the form and update the Participant's List. A copy of the form should be filed in the binder and an electronic copy should be saved in the employee Participant's E-folder.

7. Medical Monitoring Invoices

a) An **invoice** will be emailed to the MM Representative from the Doctor's office. Date stamp the invoice upon receiving it. Go to the Participant's List and update any information necessary. Remember that the next exam date should be two years from the current date unless otherwise specified.

b) Route the electronic invoice and the clearance statement to the DEP Laboratories' budget coordinator for processing and save a copy of the forms to the ADM (fldep1) (V:) Medical Monitoring – Medical Monitoring Group to Participant's folder. The DEP Lab Budget Coordinator will prepare in LiveCycle the electronic Contract Invoice 55-263A, scan and attach the invoice and clearance statement from Dr. MacKay's office and send it to the MM Program's HR Employee Relations Coordinator, Donald Coker, for payment. The Medical Monitoring Representative will be notified by email from the DEP Lab Budget Coordinator when the invoice has been sent for payment and later when the payment has been made.

The OFFICIAL COPY is the on-line version. All other copies are considered unofficial and uncontrolled