# A Vendor's Perspective

Presented by Kari Terwey, Placement Specialist Palmer Lake Placement Services, Inc. <u>kterwey@plpsmn.com</u> 763-497-1430 Office 612-718-6819 Cellular

# **VENDOR SKILL SET**

# Choosing the right vendor?

 Female/male, foreign language, cultural sensitivity, patients, motivation, experience in vocational areas and counseling abilities.

# Vendor experience/knowledge.

 Knowledge of medical conditions, restrictions, wages, labor market survey/retraining, use of career resources, organization and time management.

# The vendor represents you and your work.

- Professionalism, trust and communication.
- Team approach!

# Documentation & testimony experience.

 Reports, placement summary, experience and testimony.

# When do you make the referral?

# **REFERRAL INFORMATION**

- Contact information for all parties.
  - Client, Insurer, Plaintiff and Defense Attorneys.
  - Phone, email and fax.
  - Include DOB, DOI, WID and both the insurer's claim number and Campus claim number.
  - Average Weekly Wage (AWW).
  - Once Placement has access to WC Campus, please add to account.

# Sample Contact Form

CLIENT	C. ATTORNEY
Name:	Firm:
Address:	Attorney:
	Address:
Phone #:	
Cell #:	Phone:
Email:	Cell:
	Fax:
SSN:	Email:
WID:	website:
Claim #:	Website.
DOB	Paralegal
DOI	Faralegai
AWW	
AWW	
EMPLOYER	
Company:	
Contact:	
Phone:	
Address:	
QRC	I. ATTORNEY
Firm:	Firm:
QRC:	Attorney:
Address:	Address:
Phone:	Phone:
Cell Phone:	Cell:
Fax:	Fax:
Email:	Email:
INSURER	
Company:	
Contact:	Paralegal
Address:	
Phone:	
Direct:	Administrative Assistant
Fax:	
Email:	
Interpreter	
Company	
Contact	
Phone	
Phone	

# Documents to provide to vendor.

 R-2, initial evaluation report, vocational testing, interest inventory, transferrable skills analysis, restrictions, any mental health diagnoses, other.

# Additional Information for vendor.

 Criminal history, driving record, family situations, day care issues, use of interpreter, reading, writing or computer skills, approval to promote OJT's and skills enhancement. Personality, have you met them in their homes? Substance abuse?

# JOB GOAL DEVELOPMENT

- Team approach vs. dump and run.
- 10/2013 Law or Injury date before.

How to utilize Job Development weeks.

Do they have permanent restrictions?

QRC recommendations.

- Transferable Skills Analysis, vocational testing & interest inventories.
- Personality traits.
- Client background.
- Job search radius/geographical areas.

# REALISTIC EXPECTATIONS for the Client

- Know your client: Understand and identify barriers to employment.
  - Restrictions, computer skills, texting, emailing, social media, transferrable skills, mental health issues, limited work history, criminal record transportation, language, education/IQ, personality, etc...

# View client as a whole person.

- Current life situation.
- Prior work and non-work injuries, physical restrictions or medical related issues.
- Mental Health

# Job Seeking Skills Training.

Computer skills and abilities.

# Job Placement Plan & Agreement

- Outdated and not required. Employee signatures not required.
- Established and identified job search expectations.
- When to develop the Placement Plan.

# **Previously Required JPPA**

## JOB PLACEMENT PLAN AND AGREEMENT

Employee:	DOI:
Address:	
	Insurer:
Phone:	Adjuster:
QRC:	Claim #:
Placement Specialist:	
Start Date:	
Target Date:	

VOCATIONAL TARGETS:

The Job Placement Plan and Agreement (JPPA) contains items, which reflect the optimum expectations of the employee during his/her job seeking efforts. The JPPA should reflect the reality of the employee's ability to engage in job seeking and the service provider's ability to perform in the current labor/job market. A disagreement with the items of responsibility does not necessarily mean non-cooperation, and each may be negotiated and modified.

### COMMENTS, EXCEPTIONS OR SPECIAL CIRCUMSTANCES TO JPPA:

### DATA SUBMITTED BY QRC:

#### <u>Medical Release defining physical limitations.</u> List of Transferable Skills

Training in Job Seeking Skills Labor Market Analysis

Vocational Testing or Evaluation

### EMPLOYEE EXPECTATIONS:

- Full-time job search, 6-8 hours per day, 5 days per week
- Part-time job search, hours daily, days per week
- 1-2 Applications/Resume submitted daily, as possible
- Contact with QRC/PS twice weekly
- 20-25 telephone calls to employers per week
- 1-2 interviews arranged weekly, as possible
- Immediate follow-up on all job leads
- Job search up to a 50-mile radius
- Submit job logs with complete documentation to QRC/PS weekly
- Register with the nearest Job Service Office and maintain weekly contact, or via Internet

### EMPLOYMENT SPECIALIST EXPECTATIONS:

Providing Job Leads to the Employee on a Weekly Basis, as possible

- Submitting a Placement Report every 30 Days
- Weekly Phone Contact, and Periodic Meetings with the Employee
- Daily Log of Activity

### **INSURER EXPECTATIONS:**

Reimbursement for Mileage Expenses Reimbursement for Long Distance Phone Calls Additionally, to enhance my job search activities to secure suitable employment, I, the employee, authorize the QRC and/or the Placement Specialist to discuss my injury with prospective employers. I also authorize the QRC and/or the Placement Specialist to follow up with employers for whom I have received job leads to perform job development and enhance my employability.

Date	Employee's Signature	
Date	QRC Signature	QRC #
Date	Placement Specialist Signature	Vendor #

Date

Insurer Signature

# New Example:

## JOB PLACEMENT GUIDE

Employee:	DOI:	
Address:	WID:	
	Insurer:	
Phone:	Adjuster:	
QRC:	Claim #:	
Placement Specialist:	Client Attorney:	
Start Date:	Defense Attorney:	
Target Date:	AWW:	

### **VOCATIONAL TARGETS:**

This JPG is intended to provide structure to the placement process. The JPG is not a legally binding contract or required State form; therefore, no signatures are required. This form is used to guide Employees through the placement process and encourages certain expectations. These expectations are modified as needed.

### SUGGESTED EMPLOYEE EXPECTATIONS:

- FULL-TIME JOB SEARCH: (Optimal Expectations) Encouraged to complete 100-140 job log entries per month or \_\_\_\_\_\_ job log entries per day. These entries include a variety of contacts in the areas listed below.

### PART-TIME JOB SEARCH: (Optimal Expectations)

Encouraged to complete 80-100 job log entries per month or 4-5 job log entries per day. These entries include a variety of contacts in the areas listed below (Check All That Apply)

- \_\_\_Cold Calls
- \_\_\_\_Submitting Applications/Resumes \_\_\_\_ Reviewing Newspapers and Websites
- Letters Received from Employers
- \_\_\_\_Job Search up to a 50-Mile Radius
- Registering the Minnesota Workforce Center

### EMPLOYMENT SPECIALIST EXPECTATIONS:

Providing Job Leads to the Employee on a Weekly Basis, as possible Weekly Phone Contact, and Periodic Meetings with the Employee

#### INSURER EXPECTATIONS:

Reimbursement for Mileage Expenses

\_\_\_In Person Contacts

- Interviewing
- Follow-up Contacts to Employers
- Submitting Job Logs on a Weekly Basis Meetings/Phone Contacts with Placement Specialist
- Registering with Temporary Agencies

Submitting a Placement Report every 30 Days Daily Log of Activity

Reimbursement for Long Distance Phone Calls

### COMMENTS, EXCEPTIONS OR SPECIAL CIRCUMSTANCES TO THE PLACEMENT GUIDE:

Reviewed and Completed with Employee by:

Date:

# REALISTIC EXPECTATIONS & ROLE Of The Vendor

What constitutes vendor followup on leads?

# Job Development Services.

- Cold Calls, website reviews, developing job leads, social media, emailing employers, uploading resumes, online applications.
- Meet with the client weekly or bi-weekly?

- What constitutes a job lead?
- Short and long term goals.
  - Career vs. Transitional employment?

• Volunteer?

# Vendor documentation.

Is this individual a potential retraining candidate?
Job lead follow-up, interviews, barriers to employment.

# COMMUNICATION

# QRC responsibilities

- Meeting with vendor/client once per month.
- Notification when services are disputed.
- Notification when files close.
- Include Vendor on updates to all parties.
- Updated restrictions.
- Monthly progress reports.
- Current and Updated R-3 Plans

# Include Vendor on updates to all parties.



# Good morning Mr. Jones,

Dolly just met with Dr. Smith who upgraded her physical limitations to 25 lbs. occasional lift/carrying, able to work an 8 hour day.

She is to continue her home exercise program and a follow-up appointment is scheduled in 4 weeks (02/06/25 at 9am)

Please let me know if you have any questions.

Sincerely,

Betty Kant MAKEIT REHABILITATION 101 Ways Boulevard Tubedone, Minnesota 55447 (612) 414-4455

# **Updated Restrictions**

### Mail to:

MN Department of Labor and Industry Workers' Compensation Division PO Box 64221 St. Paul, MN 55164-0221 (651) 284-5032 or 1-800-342-5354

### Report of Work Ability See Instructions of Reverse Side



DO NOT USE THIS SPACE

Print in ink or type Enter dates in MM/DD/YYYY format

Rese

(Minn. Rules 5221.0410,I subd. 6)

This form must be provided to the employee.

NOTICE TO EMPLOYEE: YOU MUST PROMPTLY PROVIDE A COPY OF THIS REPORT TO YOUR EMPLOYER OR WORKERS' COMPENSATION INSURER, AND QUALIFIED REHABILITATION CONSULTANT IF YOU HAVE ONE.

WID number or SSN	Date of injury	Date of birth
	, , ,	
Employee		
Employer		
Insurer/Self-insurer-TPA		
Insurer claim number		

Date of most recent examination by this office

Select the appropriate option(s) below and fill in the applicable dates.

1. Employee is able to work without restrictions as of \_\_\_\_\_ (date)

2. Employee is able to work with restrictions, from \_\_\_\_\_(date) to \_\_\_\_\_(date)

#### The restrictions are:

3. Employee is unable to work from \_\_\_\_\_\_\_(date) to \_\_\_\_\_\_\_(date) The next scheduled visit is: \_\_\_\_\_as needed\_OR

# Work Comp Campus: Registered rehabilitation vendor and QRC participation

# Copies of rehabilitation reports to vendors

Registered rehabilitation vendors are currently unable to access Work Comp Campus. To ensure vendor activity and services are not affected, qualified rehabilitation consultants (QRCs) must provide vendors copies of R-forms, rehabilitation requests and responses, and monthly progress reports, as well as advise vendors of rehabilitation-related administrative conferences or

hearings, including outcomes and appeals.

This is required by Minnesota Rules 5220.1802, subpart 11:

 "Access to medical and rehabilitation reports. The assigned qualified rehabilitation consultant shall furnish other rehabilitation providers designated by the rehabilitation plan with copies of all appropriate medical and rehabilitation reports necessary for effective service provision by the other providers."

Failure of a QRC to provide information to a vendor may be considered a professional conduct issue.

If you have any questions about the information in this message, contact Mike Hill at <u>mike.hill@state.mn.us</u> or 651-284-5153.

# Rehabilitation Plans-Discuss costs, services, and service descriptions with Vendor.

## R-3 Rehabilitation Plan Amendment

EE-01-6168-798	07/01/2019					
<ol> <li>Date of first consultatio 07/28/2021</li> </ol>	on in person or telephone meeting (#29 o	·				
4. Employee name Jan Process		8. QRC name Andie Rehab				
Jan Process 5. Insurer/self-insurer/TP/	<u> </u>	9. QRC addre	44			
Uat Another One	<u> </u>	445 Test St	22			
6. Insurer claim number UatJan141		City Saint Paul				IP code 5101
<ol> <li>Employer name Uat Regression Co</li> </ol>		0700 5	1. QRC firm # 309	12. QR0 (851) 25	C phone numb 55-5888	)er
13. Change of QRC No		14. Withdrawa	al of QRC No			
Previous QRC #	New QRC #					
To extend the rehabilitation	it and rationale (attach separate sheet a on plan date and cost. Ms. Labor is rele- ued with Perfect Placement Services. T	ase to RTW with seder	tary duty limitati contacted about	ons. Job approva	development, I of computer	by agreemen classes to
16. Employee comments	(if any)					
17. QRC is to complete a	Il service areas to be provided during th	e period covered by th	is R-3			
Service category	c	Description			Projected cost	Projected completio date
00 - Rehab Consultation						
					\$0.00	
01 - Medical	Attend med appts, med related con	mmunications, etc.			30.00	
Management						
02 - On-Site Job	Possible job analysis related to job	search and/or O IT			\$100.00	11/30/2025
Analysis	Possible job analysis related to job	search and/or os i				
03 - Coordinate RTW					\$300.00	11/30/2025
Same ER						
					\$0.00	
04 - Job Modification						
04 - Job Modification					1	
04 - 300 Modification					\$0.00	
05 - Functional Capacity					\$0.00	
05 - Functional Capacity Eval					\$0.00 \$0.00	
05 - Functional Capacity					\$0.00	
05 - Functional Capacity Eval 08 - Transferrable Skills Analysis						
05 - Functional Capacity Eval 06 - Transferrable Skills					\$0.00	
05 - Functional Capacity Eval 06 - Transferrable Skills Analysis 07 - Work Evaluation					\$0.00	
05 - Functional Capacity Eval 08 - Transferrable Skills Analysis					\$0.00 \$0.00	

# Rehabilitation Plan Vendor Description Sample Projected Costs for 3 Months

Service Category	Description	Projected Cost
09	Provided by PLPS, Inc. Resume development, interview skills, completion of job logs, applications, job search online, email, upload resumes, cover letter development. Plus communications, meetings with EE, and travel time.	\$1500.00
10A	Provided by PLPS, Inc. Systematic contact with prospective employers resulting in opportunities for interviews and employment that might not otherwise have existed and includes identification of job leads and arranging for job interviews. Job development facilitates a prospective employer's consideration of a qualified employee for employment. See Minn. Stat § 176.102, subd. 5(b), for the maximum number of hours and weeks of job development services for dates of injury on or after October 1, 2013.	\$4,000.00
1 O B	Provided by PLPS, Inc. Job Placement activities that support a qualified employee's search for work including the preparation of a client to conduct an effective job search and communication of information about the labor market, programs or laws offering employment incentives and the qualified employee's physical limitations and capabilities as permitted by data privacy laws.	\$2000.00
11	Provided by PLPS, Inc. Follow up communications/meetings with EE after employment to then provide updates to all parties via email, telephone, or mail.	\$600.00
16	Provided by PLPS, Inc. Labor Market Survey ER Contacts, research and report preparation, report and completion. [ <b>QRC costs then added to this category</b> ]	\$1,000.00
18	Progress reports facilitated by PLPS, Inc [QRC costs then added to this category]	\$550.00
20	PLPS Expenses for mileage, parking. [Note: Also list special costs such as interpreters at placement meetings, computer, etc.] [QRC costs then added to this category]	\$400.00

Lack of projected placement costs in service categories may affect vendor payment and subsequent services to the IW.

# Placement Vendor

- Identification of barriers to employment/issues during placement services.
- Monthly progress reports.
- Total cost to date.
- Job Development weeks.
- Placement summaries.
- Updates on job development.
- Identification of new/possible job goals.

# Sample Placement Report

### PALMER LAKE PLACEMENT SERVICES, INC.

P.O. Box 328 St. Michael, Minnesota 55376 763-497-1430 \* Fax 763-497-1520 kterwey@plpsmn.com

Employee:

Insurer:

WID: DOB: DOI: Vendor #: 1118 QRC Firm: QRC: Adjuster: Email #: Claim #: Employer: Attorney: Defense Attny:

### PLACEMENT PROGRESS REPORT

Period of Report: 03/01/24 through 03/29/24 Date of Report: 03/29/24

Total Weeks of Job Development Services	01
Developed Job Placement Plan & Agreement	12/19/2023
Employee Began Active Job Search	01/02/2024
Average Weekly Wage	\$1,207.12

### PHYSICAL LIMITATIONS:

Diagnosis: Left Tibia Fracture

Restrictions: Per FCE 03/15/2023

may sit for 8 hours intermittently, stand for 25 minutes maximum at one time, and may walk up to 2 hours with a limit of 15 minutes maximum at one time. He may not climb ladders. He may seldom complete a full squat and occasionally a partial squat. He may occasionally crawl, reach above shoulder level, and kneel. He may seldom use a 2-step stool and occasionally climb stairs. He may seldom complete a full crouch and may occasionally complete a partial squat. He may seldom push/pull 64 pounds of force and occasionally 50 pounds of force. He should avoid inclines and slippery or uneven surfaces. He will require knee pads or cushions for any kneeling and crawling.

	Placement Progress Report –
03/29/2024	
Page 2	

	Seldom	Occasionally	Frequently	Continuously
Carry	45	35*	-	-
Lift Floor to Waist	75	60*	-	-
Lift Waist to Shoulder	50	45*	-	-
Lift Shoulder to Overhead	45	40*	-	-
Lift Waist to Waist	75	40*	-	-
*0 11101 1	· · · · · · · · · · · · · · · · · · ·			

\*Occasional lifting is on an intermittent basis.

### VOCATIONAL TARGETS:

Buyer/procurement clerk, dispatcher for crews or security, shuttle driver, light delivery, small engine repair, bench work repair, and inspection, explore construction estimating, foreman/project manager, security/loss prevention/ CCTV surveillance, orthodontic technician, sedentary production, selective customer service, explore State of MN, City, and County positions and any other areas agreed upon by all parties.

Employment Criteria: Full-time employment, Monday through Friday, dayshift. She is willing to consider occasional evening work. Benefits are important. He is seeking a position offering a wage with the potential to reach his salary at the time of injury.

Suggested Job Search Expectations: Fulltime job search, 5-6 employer contacts per day for a total of 100-140 employer contacts per month.

Barriers to Employment: List any barriers, including restrictions, criminal history, language, transportation, etc.

### **EMPLOYEE ACTIVITY:**

participated in placement meetings and was encouraged to continue with a full-time job search to result in employment that would be deemed economically and physically suitable. job search activities are detailed in the enclosed job logs dated 12/01/23 through 12/29/23 and are outlined as follows:

029 emails checked/sent/received 108 website reviews 037 job reviews 014 applications/resumes submitted 001 typing tutorial 002 newspaper reviews 004 phone contacts 004 in-person visits 002 interviews 01 phone interview

Phone Interview:

12/07/23 <u>Express Employment-</u> discussion of positions available through the staffing agency. He has not received any potential jobs or opportunities from them.

Placement Progress Report – 03/29/2024 Page 4

Placement Progress Report -

03/29/2024 Page 3

In-Person Interviews:

```
12/21/23 <u>Menards</u> for a stocker position.
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12/22/23 Menards-second interview. He was not offered the job, as they offered it to another candidate.

continued to review multiple job search websites seeking various jobs, including driving, delivery, janitor, benchwork, construction manager, supervisory, security, and general positions in his area. In addition to the website reviews, he had stopped and inquired with local employers and reviewed local newspapers.

### PALMER LAKE PLACEMENT SERVICES, INC. ACTIVITY:

#### Job Placement Services:

Describe your contact with the employee via phone, email, and meetings, as well as contacts with all other parties involved.

### Job Development Services:

Describe placement activity. Cold call attempts, total contacts, and total job leads developed both suitable and unsuitable. Website reviews.

### List of job leads provided to the employee and any follow-up activity

Employer contacts in the area of orthodontic technician, sedentary production, security, loss prevention, CCTV surveillance, small engine repair, bench repair, and dispatcher were explored. One hundred twenty-six attempts were made to contact employers, and websites were reviewed. Out of the 126 attempts, 81 employers were contacted, and a total of 31 job leads were developed. The thirty-one job leads were in the areas of dispatch, production, security, and quality positions. Unfortunately, did not meet the minimum requirements or physical requirements of the job. In addition, 8 transitional job leads were provided to to review. The transitional job leads are outlined as follows:

was encouraged to review and apply for the following positions:

Walgreens was hiring customer service representatives Dollar Tree was hiring for customer service representatives Kwik Trip was hiring customer service representatives and assistant managers Miracle-Ear was hiring for a front office receptionist HyVee was hiring for an entry-level pharmacy clerk Days Inn was hiring for a front desk clerk Grandstay was hiring for a front desk clerk Gopher Sport was hiring for a customer care representative

The following will outline the contacts for dispatcher, security, production, quality, and orthodontic technician:

Dispatcher:

Magnum Companies and Wausau Supply hired dispatchers and assistants with a two-year degree and previous experience. Magnum required working evenings and overnights.

Orthodontic Technician: No orthodontic technician positions were identified.

### Production:

Cargill was hiring production technicians to work 12-hour overnight shifts. The job required standing and walking for the duration of the shift. Doherty Staffing was contacted, and they stated they did not have sedentary options at the time of contact. Most positions required standing and walking for the duration of a shift. Other employers hiring that stated the jobs required standing included Aurora Pharmaceuticals, Faribault Mill, Home City Ice, Prairie Farms Dairy, Crown, Cork & Seal, Prairie Farms, Reckitt, Post Consumer Brands, and Dakin Applied. Employers were offering wages ranging from \$18.00-\$24.00 per hour.

### Quality:

Faribault Foods, Balchem Corporation, Jennie-O-Turkey, Oldcastle, Dianne's Fine Desserts, Aurora Pharmaceuticals, Winco, Dairy Farmers of America, Trystar, Air-lake Machine & Welding, and Hearthside Foods all had quality inspector, quality assurance and quality supervising positions available. They all required 3-5 years of experience in quality or a degree. One employer required an electrical background. did not meet the minimum job requirements for these positions. In addition, employers required the ability to stand and walk for up to 1-3 hours or more and lift 40-60 pounds occasionally to frequently. Wages ranged from \$18.00-\$26.00 per hour.

### Security:

Front Line Security Solutions, Mill Fleet Farm, Target, Michels, Allina Health, Northfield Hospitals & Clinics, DFW Security Protective Force, Amazon, and Carleton College were all hiring for security, surveillance, and loss prevention-related positions. Each employer reported the ability to respond to emergencies and to monitor grounds, buildings, and CCTV systems. Would not meet the physical requirements of these jobs. They required working evenings, weekends, and overnights. Wages ranged from \$15.00-\$28.00 per hour.

### **RECOMMENDATIONS:**

Job Development Services will continue, and I will meet with efforts. My next report will follow within 30-45 days.

to review and discuss his job search

Submitted by,

### Karí Terwey

Kari E. Terwey

### NOT REVIEWED TO EXPEDITE DELIVERY



Enc: Job Logs Mileage Log/Expense Job Placement Guide

# **Total Cost to Date Breakdown**

# PALMER LAKE PLACEMENT SERVICES, INC.

P.O. Box 328 St. Michael, Minnesota 55376 763-497-1430 \* Fax 763-497-1520 kterwey@plpsmn.com

Employee:	Insurer:
WID:	Adjuster:
DOB:	Email:
DOI:	Claim #:
Vendor #: 1118	Employer:
QRC Firm:	Attorney:
QRC:	

Defense:

# TOTAL COST-TO-DATE BREAKDOWN

### DATE: 03/29/2024

CODE	DESCRIPTION	CURRENT MONTH	PREVIOUS TCTD	CURRENT TCTD
9	Job Seeking Skills Training	\$0.00	\$2,103.45	\$2,103.45
10A	Job Development Services	\$876.47	\$4,503.61	\$5,380.08
10B	Job Placement Services	\$817.39	\$3,802.58	\$4,619.97
11	Post Placement/Follow-up	\$0.00	\$0.00	\$0.00
16	Labor Market Survey	\$0.00	\$1,152.22	\$1,152.22
18	Administrative	\$177.26	\$1,082.32	\$1,259.58
20	Expense/Other	\$108.73	\$1,353.66	\$1,462.39

TCTD	· · · · · · · · · · · · · · · · · · ·		\$15,977.69

# SUMMARY

Choosing the right vendor.

Setting realistic expectations.

Communication.

# What Questions do you have?

Kari Terwey, Placement Specialist Palmer Lake Placement Services, Inc. <u>kterwey@plpsmn.com</u> 763-497-1430 Office 612-718-6819 Cellular