

CM Training Content & Learning Objectives	Instruction method: Handout/PPP/Policy/Case Studies/learning activities/templates
1) Course Introduction	
a) Training Course Outline	CM Training outline
b) Training schedule	(Individualized)
c) Training checklist	Training checklist
d) Evaluation and Audits	Checkpoints audit
e) Training satisfaction evaluation	Satisfaction
2) Overview of WorkSafeNB and Case Management	
a) Foundation of the system	Meredith principles (Workers Guide pg.5)
b) Legislation and policy (overview) <ol style="list-style-type: none"> 1. Workers' Compensation Act 2. WHSCC Act 3. Occupational Health and Safety Act 4. Firefighter's Compensation Act 5. Protection of Personal Information Act 6. Government Employees Compensation Act 7. Policy (Volumes 1-4) 8. Directives, Procedures, Appendices, other reference 9. Publications 	SafetyNet website – navigating the policy website External WorkSafeNB website Publications & Pamphlets: <ul style="list-style-type: none"> • Accommodation at Work • The Back Book POLDIR shared drive and CM tools index
c) Types of benefits and services: <ol style="list-style-type: none"> 1. Financial assistance (LOE, survivors, annuity, PPI) 2. Medical Aid (medical accounts, travel expenses, Rx, care allowance, medical supplies, assistive devices, home and vehicle modifications, etc) 3. Programs and Services (Rehab and RTW programs, VR services, Prevention initiatives) 	Overview discussion (also refer to Workers' Guide)
d) Organizational structure and regional offices <ol style="list-style-type: none"> 1. Roles of other WorkSafeNB departments 2. Roles of outside agencies 3. Roles of CM team members (CM, RD, MA, OT, RS, PTC, SC, AA) 	Org charts on Intranet, Org chart for the region, Regional Comp staff , CM interactions slide
e) Life of a claim	Life of a claim handout
f) Case management overview	Job description and CM standards

Content	Instruction Method
Develop e-learning modules for Workbench functions	
3) Workbench	Hands on using training environment as needed
a) Overview of basic features and functions <ol style="list-style-type: none"> 1. Searching for claims by specific criteria 2. Document list 3. Useful reports (payment inquiry, caseload, o/p, etc) 4. Sort, filter and print options 	Authorization of over limit payments (directive 21-002.01), printing caseload reports, o/p screen.
b) Inbasket	Who to add, ranking list, how to use, viewing, deleting, coding, indexing, doc ID #, corrections e-mail
c) Event Log	Event types/subtypes , sort and filter functions, claim vs individual events
d) Rehab Plan	List of task types/subtypes , date fields, provider info, authorizations, action items, progress notes, linking
e) Individual	Contact info, caution flag, court orders, banking info
f) Claim	CM/RS/OT/county, status, openings, CPPD, PPI
g) Ben Calc	Effective dates, Tax exemptions, PAE's, ECE, remuneration, award
h) Payment	Pay codes list (see legend) and payment inquiry screen, 3DW, GRTW, VR codes, inclusive/exclusive dates, comp day, split payments, c/o, DD, r/s and cancellation.
i) Action List	Action items guide , Confirm Dx, Timely Intervention, Determine WR, f/u items – check daily
j) Correspondence	List of templates used by CM, recipients, coding, french and english versions, data field prompts
k) Awards	LTD, CA, clothing allowance
l) Rx Coverage	Rx details (of those paid by WorkSafeNB), formulary and special auth info
m) Cost Analysis	for VR purposes
n) Processes	Quick reference processes (closure, reopenings, PPI, setting up rehab plan, RTW incentive qualifiers)
o) Acronyms and Abbreviations used in Workbench	Acronyms
p) E-physio	PT treatment module, electronic communication

Content	Instruction Method
4)Medical Management and Rehabilitation	Policy 25-001 –Medical Aid Principles Policy 21-400 Rehabilitation
a) Describe the phases of injury	Medical Aid SOC 25-002 , CM activities chart
b) Identify Disability Duration Guidelines	WorkSafeNB DDG , DDG for common Dx
c) Identify Expected Healing Times	EHT chart
d) Describe the Continuum of Care	CofC PP slide
e) Generally Approved Care, including: 1. PT (and use of PTConsultant, see 25-300.04) 2. Chiro 3. Surgery, consults, investigation (when do we expedite?) 4. Acupuncture	Standards of care directive 25-002.01 and appendices re: approved acupuncture providers, expedited decision tree. E-Physio module Templates CHIRO,PHYSIO, ACCUPUNC. Direct Access Physiotherapy –pilot and nursing home
f) Shoulder program	Shoulder protocol and templates
g) Back program	Back protocol and templates
h) Work Conditioning	Pam W., pamphlet, approved clinics , Templates WC...
i) Multidisciplinary Treatment	Barb K., Multi standards , cc M19 to “work recovery ref”
j) Work Capacity Evaluations	Heather F., types of WCE referrals
k) Permanent Work Restrictions	Heather F..
l) Traumatic Psychological injuries	TPI protocol and templates, Psyc Consultant
m) Not approved care	SOC directive 25-002.02
n) Generally not approved care (25-002.03), including: 1. Massage 2. Injection-based treatment 3. Foot orthotics and insoles for back pain	SOC directive 25-002.03 , list of approved massage providers and injections flowchart
o) WRC services	Tour with Eileen K., Templates M19
p) Opioids	Policy 25-012 , directive , opioid review process booklet, Substance addiction and dependency appendix
q) Neuropathic pain medications	Procedure 25-014.02.01 , NP booklet, Template-NEURO
r) Chronic pain	Policy 25-030
s) Requests for diagnostic tests and consults, and xpd service	MA opinions, 25-002.01, Templates: EXPED, providers
t) Cadre network of physicians	Discussion and template CADRE
u) Canadian Health Solutions	Referral process , referral form

v) Communication with providers when making referrals	By phone (billing forms available), fax, templates
w) Medical/anatomical terminology	Medical glossary , anatomy
x) Mental Health Services and TPI	25-001.02 , Templates PSYCA, PSYCT, TPI docs
Content	Instruction Method
5)Return to Work	Shadow a regional OT for a day
a) RTW programs 1. Gradual 2. Modified 3. Transitional	Policy 21-420 RTW principles Referrals to OT: internal vs external (documentation) MRTW and NLT , MRTW guidelines , indications for transitional , Scenarios when GRTW not available
b) Ergonomic Assessment	Heather F. for orientation re: all OT services
c) Job Site Analysis	JSA bank access and use
d) Work Capacity Evaluations 1. General 2. Job specific 3. General/Job Specific	WCE referral types and purpose (from the OT binder)
e) Accommodation (& Reemployment Obligations)	Policy 21-413 , Accom process flowchart , Duty to Accommodate publications, templates DUTACOM, ACC
f) Job matching (for RTW or VR purposes)	See Heather F.
g) Mediation	Policy 21-414
h) Graded Exposure for TPI claims	Heather F/Pam P TPI documents
6)Administrative Processes	
a) Claim transfer and assignment to CM 1. Out of province claims 2. Interjurisdictional agreements 3. Focus firms and assigned employers 4. Staff claims 5. Conflict of interest?	Discussion: Assigned by region, by county, by employer, by industry, by P&A score, by severity. Interjurisdictional agreement, out of province claim assignment.
b) Initial Contacts (phone or face-to-face) 1. Injured worker 2. Employer 3. Service Provider(s)	CM standards on content and documentaton of discussions. Identification of amber flags. Early CM checklist for use on new claim assignments. Motivational interviews: general , high P&A , and the cog mot approach in face-to-face meetings
c) Action Items:	Action item users guide and quick reference

<ol style="list-style-type: none"> 1. Confirm Diagnosis 2. Timely Intervention 3. Determine Work Restriction 	A: Training environment practice -Find a CM's backlogged action list and complete/reset the tasks.
d) Rehab planning for specific claim types <ol style="list-style-type: none"> 1. High P&A 2. Back program 3. Shoulder Program 4. Surgical 5. TPI 6. Other (low motivation, MTBI, spinal, amputation, chronic pain, exposures, occupational diseases) 	Procedures: High P&A CM standards Back Program Shoulder program XPD surgery decision tree TPI Discussion of options for other types. The Back Book publication
e) Screening questionnaires (P&A, SF36, QPD, MI)	Questionnaire guide
f) Team meetings	Format, date, etc (varies by region)
g) Payment of RLOE and 3Day reimbursement	Odd/even, M-F, order dates, lost cheques template AFFID, coding, adjustments, partial week and GRTW payments. A: Make payments in training environment. Policy 21-211 (3DW)
h) Advances and payout of benefits	Policy 21-505 , directive 21-505.03
i) Court orders and Diverting Compensation benefits	Policy 21-219 , discuss incarceration
j) Supplements to Compensation	Policy 21-215 and it's procedure and appendices
k) Overpayments	Policy 21-290 and directive (financial hardship criteria), 'unofficial' procedure, Templates OVRPYMT, OPCPP
l) CPPD <ol style="list-style-type: none"> 1. In receipt of 2. Information letter 	Policy 21-230 and directive re: calculation Procedure for sending the template CPPDINFO
m) Suspension and closure of claim <ol style="list-style-type: none"> 1. RTW (21-400) 2. Fit to RTW (21-400/21-210) 3. Non-participation (25-070) 4. Intervening condition (25-010) 5. Other (age 65, other remuneration) 	Closure checklist References: Policy 21-400, 21-210, 25-070 , 25-010 Directive: 21-400.06 Disposition codes and appendix Templates : NONPART, BLANK(A), ACCOMF, AGE65
n) Appeals process	Appeals pamphlet, Discussion re: Workers Advocate, Employers

	Advocate, MLA, Ombudsman, processing the decision (template RETRO). <i>Bring appeal decisions to team for further management direction.</i> Reopening of files to reflect it's an appeal decision.
o) Adjudication 1. General Principles (21-100) 2. Pre-existing Condition (21-101) 3. Recurrences (21-102) 4. Injury during rehab (21-108) 5. Admin-Reopening	Reopenings – admin and recur (Procedural draft document) Policy 21-100 , 21-101 , 21-102 , 21-108 Timeframes/criteria to determine CM vs ABS decision
p) Threats (to self or others)	Procedure 33-000.47.01 : re: violent threats, directive 21-100.01.01 re: suicide
q) Cost Relief	Policy: 21-300 Allocation of claim costs. Interpretation . Template COSTREL
r) Surveillance and investigation	Discuss: With RD approval, through legal counsel
s) File release requests	41-007 Privacy and Info security, 21-023.01 Ombudsman, templates ACCESS1
t) Official languages and translation	Procedure 44-005.01.01
u) Form of Election/3 rd party claims	Policy 46-220 , Template (ELECTION), documentation
v) Decision-making, decision letters and communication	Policies: Communication 21-419 , Weighing Info 21-113 , Medical Aid Decisions 25-014 , complaints. Templates, writing guide and tips
w) Soft skills of Case Management	Policy 20-100 Service Delivery, cognitive motivational approach, active listening, respect and professionalism.
x) Time Management and Organization	Discuss sources of incoming info and prioritization of work: inbasket, phone, fax, mail, e-mail, team, f/u action items, RightFax. Printing caseload list (color coding)
y) Claims to CM on Modified duties (NLT)	MRTW guidelines document
7)Benefit Entitlement	
a) Loss of Earnings (Wage setting) 1. Initial calc of RLOE benefits 2. 12-week wage review 3. Subsequent reviews	Policy 21-210 Calc of Benefits and its directive , interpretation re: contractors/subcontractors , w/r calc spreadsheet , w/r process , template WRRESUL Policy 21-208 Workers Under 21

4. Annual review 5. Income tax exemptions 6. Long term disability benefits (refer to module 8) 7. Pensions (Pre-1982 claims)	Policy 21-270 Annual review and directive on income tax exemptions , template INDAG, concurrent RLOE/LTD benefits
b) Claim-related Travel expenses 1. Transportation (29-220) 2. Accommodation 3. Meals 4. Child/Dependant Care (29-223) 5. Training related travel (29-224)	Policy 21-220 and directive and it's appendix Fee schedules Travel info sheet and template TRAVFORM Template BSE (babysitting expenses)
c) Prescription eyeglasses	Directive 25-152.01 , fee schedule 29-510
d) Hearing Aids and Batteries	Directive 25-152.01, fee schedule 29-551
e) Care Allowance	Policy 25-003 and directive , procedure and fee sched 29-550 , Woodcutting guidelines , Templates CA...
f) Quality of Life Grant	Policy 25-003 and directive and fee sched 29-555
g) Clothing and Footwear	Policy 25-008 and directive and fee sched 29-557 , clothing allowances (VR vs long term)
h) PPI – who is eligible, steps/process involved	Policy 21-250 and directive and regulation 82-165 , (also 37-110.01 NBIAE when processing payment), templates LOA, PPI process and basic info sheet
i) Prescriptions (E-pay)	Discussion of formularies, special auth, e-pay pamphlet, multiple Templates: DRG..., RXDENIED, SPECAUTH
j) Annuity	Policy 21-206 , automated process
k) Prostheses, Orthoses and Assistive Devices	Policy 25-007 , approved providers
l) Home modification	Policy 21-403 , process , checklist
m) Vehicle modification	Policy 21-402
n) PT-related supplies	Directive 25-300.06
o) RTW incentives (JS incentive, workplace modifications, etc)	Policy 21-418 , JS incentive info
p) Survivor's benefits and burial expenses	Policy 21-515 , 29-515 (fee schedule)
8) Vocational Rehabilitation and Long Term Disability	Shadow an RS for a day

a) CM referral of client to VR	Transfer checklist, Template VRREFER
b) Voc Rehab planning continuum <ul style="list-style-type: none"> 1. Initial meeting with RS 2. Vocational Assessment (interest, aptitude, intelligence, TSA) 3. Estimated Capable Earnings (ECE) and identification of suitable employment 4. Options <ul style="list-style-type: none"> a. job exposure b. TOJ c. JS d. upgrading e. training f. self-employment 5. CBA and determination of plan 6. Execution and monitoring of plan 	VR continuum document Policy 21-421 Voc Rehab, and it's procedure re: retraining costs 21-417 Identification of Suitable Employment 21-410 Allowances for Self Employment Weekly allowances for training is covered under module 4(b) Discussion of ECE and demo of cost analysis
c) Job search consultants	Purpose and functions - contract
d) Voc Rehab documentation	VR document pathways , templates
e) VR information	VRINFO template
f) Establishing LTD awards <ul style="list-style-type: none"> 1. LTD Workbook 2. LTD letter from CM 3. Encourage CPPD application if appropriate 	LTD Workbook , LTD templates, annual review process for LTDs
g) LTD transfer procedure	Transfer procedure , transfer checklist
9) Reference	
a) CM tools list on poldir drive	Index
b) Grandroundsnow website	www.grandroundsnow.com
c) Cognitive Motivational Training	Binder
d) Early CM checklist	Early CM checklist
e) Closure checklist	
f) CM Standards	Procedure 21-400.07.01
g) CM-related policy clusters	Policy training clusters

Remember to request:

- Electronic signature and phone #
- Auto-routing request to Production/Access Requests e-mail
- Business cards
- Phone set up....passwords, voicemail, caller ID