

## Restrictions

- Clearly and logically describe the objective medical restrictions on the claimant's generic 'activities' based on the medical findings and the diagnosis.
- Distinguish between restrictions based on the injury and restrictions based on other diagnoses.
- Check that the restrictions make good sense:
  - Compare the restrictions with the claimant's current range of leisure activities.
  - Compare the restrictions with those of a similar patient group in the community.
- Distinguish between the claimant's subjective self-restriction and what you would medically advise.
- Consider the question, 'If the claimant wanted to do a certain activity (eg. running, standing, or typing), would I advise them to go ahead, not to do it, or to limit the time they spend doing the activity?'
- Consider whether specific activities would make the condition worse or be 'unsafe' for the claimant or others.
- Consider the question, 'If the claimant were a job applicant and I were doing a pre-employment assessment, would I medically disqualify them from that activity?'
- Ensure you consider the claimant's pain experience, psychological status, and stamina in coming to these conclusions.
- When discussing psychological restrictions, show how these relate to history and reported function.

**Tip:** think about activities rather than jobs for this step (eg. walking, standing, lifting limits, overhead reaching, cognitive tasks, and sitting).

## Initial medical assessment recommendations

- What rehabilitation is likely to improve the condition? (Evidence based, 'reasonable', available... ) What are the goals of rehabilitation?
- Is further opinion required from a specialist or therapist? (Surgery, investigations, etc.)
- How are non-injury conditions managed? (Weight loss, blood pressure, etc.)
- If pain is a significant issue, discuss the role of rehabilitation in managing this symptom.
- Recommendations for likely medical sustainability of job types included in the Initial Occupational Assessment should:
  - be based on current restrictions and likely improvement with rehabilitation
  - discuss whether you would advise against this role if the claimant were applying for it (– medically objective rather than subjective)
  - record the nature of any comments by the claimant on each job option.

## Vocational independence medical assessment recommendations

### Rehabilitation

- Comment on completion of rehabilitation and stability of injuries:
  - Are there any significant gaps in rehabilitation?
  - Does the claimant have improved coping strategies at the conclusion of rehabilitation?
  - Treatment may be continuing but discuss any planned major surgery or intervention.
- Comment on the status of non-injury conditions.

### Job Types

- Report on **each** job separately.
- Discuss the claimant's capacity to perform this job type for 35 hours per week.
- Avoid sitting on the fence – make a positive recommendation that there either **is** or **is not** a capacity to do this work.
- If workplace accommodations are required, discuss these in detail. Minor accommodations would not affect the capacity. Major adjustments may make the job type unsustainable.
- Discuss capacity explicitly in terms of the **tasks and functions** of the role. Show how the capacity relates to the restrictions established.
- If pain or psychological features affect restrictions, discuss how these affect your reasoning for each job type.
- If non-injury conditions pose restrictions, discuss how this affects capacity for each job type.
- Explain variances, if any, with the views of the Initial Medical Assessment and the GP. If they corroborate your views, then comment on this.
- Discuss the claimant's testimony and previous medical practitioners' views in relation to your findings.
- Record the claimant's comments for the job types. Verbatim recording is not necessary – capture the sentiment.

**Tip:** this section builds on the restrictions you identified previously. Check each job recommendation is consistent with your advice on activity. Check for common sense and safety for self and others. Discuss your reasoning.

# Vocational Medical Assessment

## Quick reference card

This quick reference card outlines some key points for you to consider when preparing for and completing an assessment.

## Preparing for assessment

### Issues to consider before you proceed with an assessment

- Whether information received is complete and adequate.
- Whether clear information is going out to the claimant.
- Claimant safety, privacy, and dignity.
- Assessor safety.
- Whether a chaperone is advisable.
- Guidance on bringing a support person and/or taping the assessment.
- Privacy of records and handling of medical information.
- Non-treating doctor.
- Noting response to job types.

## The medical assessment and report

- Aim to show the relationships between:
  - the information gathered and the diagnosis
  - the diagnosis and the restrictions imposed by a condition
  - the restrictions and occupations.
- Your conclusions should be clear and well reasoned, and should make sound medical sense.
- Each step must be medically justified by, and link back to, the previous step in the discussion.

### Information

- Check you have received information from the Case Manager and recorded the documents you have read.
- Comment on whether the information is adequate for the assessment.
- Acknowledge any further information the claimant has brought for you to consider.
- Check that you have an accurate record of the claimant's name, date of birth, address, ACC claim number, and Case Manager.
- Record in your assessment that you have communicated the purpose of the assessment.
- Make a note of anyone else who was present for the interview and examination.

**Tip:** make yourself a checklist where you can tick off tasks as you complete them, so you won't miss them from the report.

## History

Make sure you have the following information:

- accident and injury details
- current status, including all symptoms, pain, response to injury, level of function, and disabilities
- current lifestyle, social situation, responsibilities, and activities
- other medical conditions
- psychological history
- family history
- medications and allergies
- occupational history
- relevant non-work activities.

**Tip:** keep in mind that this is a baseline for rehabilitation or pre-employment medical. What do you need to know to make a recommendation?

### Special notes on psychological history

- Assess validity of claimant's self-report – comments should not just be recorded as matter of fact.
- Record psychosocial history, including pre-injury psychological functioning.
- Explore the following:
  - forensic history
  - employment stability
  - relationships
  - finances / personal affairs
  - head injury / concussions
  - risk-taking behaviours
  - substance abuse
  - education, including peer and teacher relations
  - current strengths and weaknesses
  - pervasive personality issues and/or, mood patterns
  - cognitive functioning (intellect)
  - illness perception and attitude
  - family history (including mental illness) and attachment issues.

## Examination

Fully document your examination techniques and findings, including details that are important for occupations, such as cardiovascular and respiratory basics, basic neurology screening, handedness, eyesight, hearing, and gait.

**Tip:** the person reading your report needs to see that you have all the information you need in order to recommend that the person could be, for example, a teacher, a truck driver, an airline pilot... Examine with this in mind!

## Investigation

- Describe all relevant investigations and view all relevant reports.
- If you cannot view a particular report, state whether this is important for your conclusions.
- If you would like to see the actual report before coming to your conclusions, make sure you record this.

**Tip:** if you need to investigate further to reach a diagnosis or to clarify what a condition is, arrange these investigations and agree with the Case Manager to delay your report.

## Diagnosis

Detail the differential diagnosis where appropriate and the reasons for arriving at the preferred diagnosis. Make sure you include any diagnoses that are relevant:

- injury
- non-injury
- medical
- surgical
- psychological.

### Special note on pain:

- Identify and deal with pain issues. Comment on how pain and medications affect the claimant's stamina and concentration levels.
- Describe the pain. Is it mechanical? Is there a pain syndrome or central sensitisation? Specify if there is no pain syndrome. Record if there is no pain at the assessment. Record overt illness behaviour and specify any activities that aggravate or relieve pain.

**Tip:** check that your diagnoses present a full picture. If your diagnosis varies from those in other reports, describe why you have reached this conclusion.