



# Medical Surveillance Employee Training



# Medical Surveillance Scheduling

- Each District Manager/Senior Manager is responsible for designating a Scheduler for their work group and communicating it to their work group.
- Each district/work group is responsible for determining how they would like their surveillance appointments scheduled (i.e. who will schedule the appointments - the scheduler, the supervisor or the employee). However, it's proven to be a much more cohesive process if appointments are scheduled by the Scheduler, rather than the supervisor or employee. This helps to ensure that the correct tests are being scheduled, and the correct information is entered into OSHIS. If the scheduler is not scheduling the appointment the employee must still get scheduling information from the scheduler to complete the task properly – clinic information & all required tests for the surveillance.
- The Scheduler has access to view employees in medical surveillance, the surveillance you are due for and the date you are due. The Scheduler also has access to the approved Clinic List for appointments, and what tests are required for your surveillance.
- The Scheduler has access to the Appointments module in OSHIS. The Scheduler is responsible for entering all appointment information into OSHIS prior to your appointment. If the Scheduler is not the one scheduling the appointment, the person who does schedule the appointment is responsible for getting the appointment information to the Scheduler to enter into OSHIS prior to the appointment. This has to happen in order for you to receive your clinic authorization.

# Surveillance Process Overview

- Step 1: Surveillance due email notification received
- Step 2: Contact scheduler to see what surveillance you are due for & coordinate scheduling
- Step 3a: Appointment is scheduled with a clinic & entered into OSHIS
- Step 3b: Employee completes any required questionnaires for due surveillance in OSHIS & prints if required
- Step 4: Employee receives Outlook calendar invite of medical appointment. Employee prints this email to take to appointment, this is the clinic authorization
- Step 5: Employee arrives to appointment with clinic authorization & any required questionnaires

# Medical Surveillance Due Notifications

- 35 days prior to your surveillance due date the email notification on the following page will be sent to you & your supervisor. Follow directions in notification.
- Follow your workgroups procedure for scheduling of medical surveillance appointments. If you do not know the procedure contact your supervisor.
- If an appointment is not entered into OSHIS by your Scheduler reminder emails of due surveillance will be sent out 7 days before your due date to you & your supervisor, and again 1 day past your due date to you, your supervisor & manager.
- If you do not know who your Scheduler is contact your supervisor.

# Surveillance Due Email Notification

Employee and Supervisor will receive the following notification 35 days prior to surveillance due date. Follow directions in notification:

Dear <<Employee.FirstName>> <<Employee.LastName>>,

This is a notification that you are due for work related required medical surveillance. This must be completed by <<ExpirationDate>> .

## Action Required:

**Step 1:** Contact your district's designated Scheduler to see what surveillance you are due for, and for scheduling information. If you do not know who your designated scheduler is contact your supervisor, as this person was designated by your upper management.

**Step 2:** Login to [OSHS](#) /MyCority to complete any surveillance questionnaires required for your **due** surveillance. Do not complete all questionnaires, only complete questionnaires for surveillance you are due for.

- **If you are due for Noise surveillance** please complete the Hearing Conservation questionnaire online and submit electronically through MyCority. Do **not** take this form to appointment
- **If you are due for a DOT physical** all DOT forms will be provided by the clinic
- **If you are due for Lead surveillance** and you choose to decline, the declination form is available online and is submitted electronically through MyCority. Do **not** take this form to appointment
- **If you are due for Hazmat surveillance** you must complete the *Medical Surveillance Periodic Health Evaluation Form*, print and submit electronically through MyCority. **Take the printed copy to your appointment**
- **If you are due for Asbestos surveillance** you must complete the *Medical Surveillance Periodic Health Evaluation Form* & the *Asbestos Exposure Questionnaire*, print and submit electronically through MyCority. **Take the printed copy to your appointment.**
- **If you are due for Respirator User - Questionnaire** please complete the Employee Health History for Respirator questionnaire online and submit electronically through MyCority. Do **not** take this form to your appointment (this does not require a medical appointment)
- **If you are due for Respirator User - Fit Test** contact your supervisor (this does not require a medical appointment)

**Step 3:** Once your Scheduler enters your appointment information into OSHS you will receive an **Outlook calendar appointment invite**. **You must print this notification and take with you to your appointment.** The notification lists your authorized tests, it serves as your clinic authorization. **The clinic will not be able to complete your surveillance if you do not arrive with all of the required information for your due surveillance.**

Please contact your groups designated Scheduler if you have any questions.

Thank You,

BPA Safety & Occupational Health

# Signing in to OSHIS/MyCority

- Log in to OSHIS: <https://bpa.my.cority.com>  
Login Name: BPA email  
Enter Password: (If this your 1<sup>st</sup> time logging in click on the Forgot Password link, enter your BPA Email & look for an Outlook email to enter a password of your choosing)
- Once signed in you will be at your dashboard:

The screenshot shows the OSHIS/MyCority dashboard. At the top is a blue header with the OSHIS logo and the text "OSHIS Occupational Safety and Health Information System". Below the header is a navigation menu on the left with icons for Home, My Dashboards, My Tasks, and Incident Reports. The main content area is divided into two sections: "Create New" and "Filter by". The "Create New" section has two buttons: "New Questionnaire" (with a list icon and a plus sign) and "Safety Reporting" (with a warning triangle icon and a plus sign). The "Filter by" section has four buttons: "Questionnaire" (with a list icon and a notification badge showing "2"), "Inspection" (with a checkmark icon), "Action" (with a clipboard icon), and "Incident Assessment" (with a warning triangle icon).

# Surveillance Questionnaires

Contact your Scheduler to see what surveillance you are due for. If your surveillance requires completion of a questionnaire, they can be located in the “My Tasks” section.

The screenshot displays the OSHIS (Occupational Safety and Health Information System) web application interface. The top navigation bar is orange and features the OSHIS logo. A sidebar on the left contains navigation links: Home, My Dashboards, My Tasks, and Incident Reports. A red arrow points from the text above to the 'My Tasks' link. The main content area is divided into two sections: 'Create New' and 'Filter by'. The 'Create New' section includes 'New Questionnaire' and 'Safety Reporting' buttons. The 'Filter by' section includes 'Questionnaire' (with a '2' badge), 'Inspection', 'Action', and 'Incident Assessment' buttons.

OSHS  
Occupational Safety and Health Information System

Home  
My Dashboards  
My Tasks  
Incident Reports

Create New

New Questionnaire  
Safety Reporting

Filter by

Questionnaire  
Inspection  
Action  
Incident Assessment

# Surveillance Questionnaires

- Select the questionnaire to complete

The screenshot shows a web application interface with a yellow header bar labeled "My Tasks". On the left is a navigation sidebar with icons for Home, My Dashboards, My Tasks, and Incident Reports. The main content area has two tabs: "Incomplete" (active) and "Complete". There are two questionnaire tasks listed:

- Questionnaire**  
Due: **NOW**  
Complete Respirator Medical History Questionnaire  
Assigned To: Me  
Awaiting Responses
- Questionnaire**  
Due: **NOW**  
Complete Hearing Conservation Questionnaire  
Assigned To: Me  
Awaiting Responses

A red arrow points from the text "Select the questionnaire to complete" to the first task. At the bottom right, there is a pagination control showing "Items per page 20", "1 - 2 of 2", and navigation arrows.



# Surveillance Questionnaires

- Complete the questionnaire by answering the questions
- See next page to determine if you need to print the questionnaire prior to submitting

← My Tasks DS

Home

My Dashboards

My Tasks

Incident Reports

Hearing Conservation Questionnaire Cancel Save Submit ⋮

1. Please indicate your present hearing ability.  
Good

2. Have you been notified that you have had a Standard Threshold Shift (STS) or a Recordable Standard Threshold Shift (R-STTS)?  
 Yes  No

3. Which ear do you hear better with?  
Same in both ears

4. Do you ever experience ringing or other noises in your ear(s)?  
 Yes  No

5. Do you have a large amount of ear wax?  
 Yes  No

# Surveillance Questionnaires

- Some questionnaires require that you print them & take to your appointment – this information is available in the email notification you receive as well:
  - If you are due for **Hazmat surveillance** you must complete the *Medical Surveillance Periodic Health Evaluation Form*, print and submit electronically through MyCority. **Take the printed copy to your appointment**
  - If you are due for **Asbestos surveillance** you must complete the *Medical Surveillance Periodic Health Evaluation Form* & the *Asbestos Exposure Questionnaire*, print and submit electronically through MyCority. **Take the printed copy to your appointment.**
- To print, click on the 3 dot icon & select print (you can also choose to save as a PDF)
- Click the Submit icon to submit your questionnaire to BPA Occupational Health for review by the BPA Medical Officer.

← My Tasks

Home

My Dashboards

My Tasks

Incident Reports

Employee Health History for Respirator Questionnaire

Cancel Save Submit

Purpose: BPA will use this information to determine medical qualification to wear a respirator and work in coordination with your Licensed Care Professional and BPA's Medical Officer regarding respirator use and requirements for the job you perform.

Authority: 42 U.S.C. (Symbol) 7101, et seq.; 50 U.S.C. (Symbol) 2401, et seq.; and DOE Order 440.1.

Routine Uses: A record in the system may be disclosed to treating physicians and to the US Department of Labor to maintain a record of occupational injured or illnesses and treatment services to patients. A record in this system may be disclosed to appropriate local, state, or federal agency when the records alone, or in conjunction with other information, indicate a violation or potential violation of law, whether civil, criminal, or regulatory in

# OSHS Appointment Scheduling

- Once your appointment has been scheduled with a clinic per your workgroups process and is entered into OSHS by your scheduler you will receive an emailed Outlook calendar invite for your appointment (see next page). This email must be printed and taken with you to your appointment. It is your clinic authorization.
- You will also receive a reminder email 3 days prior to your appointment.

# Documents Required for Appointment

- Print this & take to your appointment – this is your clinic authorization

The screenshot shows an Outlook meeting invitation window titled "Appointment Request for Scheduled Surveillance Appointment - Meeting". The meeting is for Friday, March 20, 2020, from 8:00 AM to 8:00 AM PST. The subject is "Appointment Request for Scheduled Surveillance Appointment: Provider". The body of the email contains the following text:

This is an automatic appointment request generated by your medical department from the Cority Environmental Health & Safety system for the following:  
Activity: **\*\*\*DOT Medical Clearance\*\*\***  
**\*\*\*Hazardous Material Exposure\*\*\***  
**\*\*\*Noise Exposure\*\*\***  
Scheduled Surveillance Appointment  
Date: 03/20/2020  
Time: 8:00 AM (PST)  
Appointment Scheduled With: Vernon, Crystal  
Clinic: Performance Occupational Health, 11109 NE 14th St #A Vancouver, WA, 360-334-7001  
Employee: Zuckerberg, Mark  
Notes: EMPLOYEE MUST PRINT & TAKE THIS TO CLINIC FOR SERVICE. Clinic Authorization for activities listed above only. Return results via fax: 360-418-8574. Ordered by Dr. Greg Freed, BPA Medical Officer. Questions: 360-418-8537.

Below this text are instructions for Outlook and Lotus Notes users on how to accept or reject the appointment.

Red annotations on the screenshot include:

- An arrow pointing to the "File" menu in the Outlook ribbon with the text: "To print click on file, select print".
- An arrow pointing to the activity list in the meeting body with the text: "This is your Clinic Authorization, it tells the clinic what tests are needed when you arrive for your appointment.".
- An arrow pointing to the "Notes" section with the text: "This tells the clinic where to send your results.".

# Documents Required for Appointment

**You must take the following with you to your appointment:**

- The Outlook calendar email notification you received which lists all authorized tests required at your appointment (see previous page)
- Any questionnaires required to be completed for Asbestos or Hazmat surveillance if you are enrolled in these surveillance programs (questionnaires in OSHIS)
  - Hazmat Surveillance: Medical Surveillance Periodic Health Evaluation Form
  - Asbestos Surveillance: Medical Surveillance Periodic Health Evaluation Form & Periodic Asbestos Medical Questionnaire

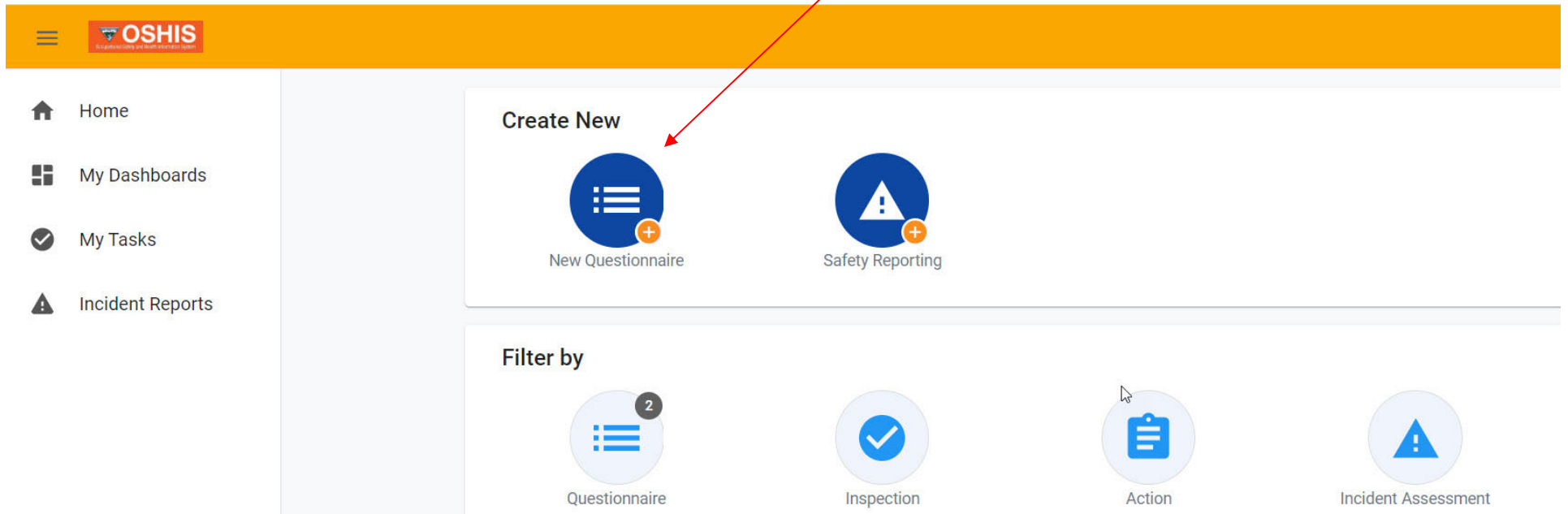
Note: The clinic will not be able to complete your surveillance if you do not arrive at your appointment with required information

# Respirator User – Questionnaire/Fit Test Surveillance

- If you are due for Respirator User - Questionnaire you do not require a medical appointment. You only need to complete the Employee Health History for Respirator questionnaire in OSHIS
- This questionnaire does not require printing. It will be reviewed electronically by BPA's Medical Officer. On occasion the Medical Officer may require that your respirator medical clearance be completed with an appointment at a clinic. If this is the case you will be notified.
- If you are due for Respirator User - Fit Test you do not require a medical appointment. Contact your supervisor for fit test information, or contact Industrial Hygiene @ [OccSafety&Health@bpa.gov](mailto:OccSafety&Health@bpa.gov)

# Lead Declination

- If you are due for lead surveillance & choose to decline lead surveillance you may do so by clicking on New Questionnaire icon.
- The Lead declination is good for 12 months at a time. After the 12 months you will be due for lead surveillance again.



The screenshot displays the OSHIS web application interface. The top navigation bar is orange and contains the OSHIS logo and a hamburger menu icon. The left sidebar lists navigation options: Home, My Dashboards, My Tasks, and Incident Reports. The main content area is divided into two sections. The 'Create New' section features two large circular icons: 'New Questionnaire' (a blue circle with a white list icon and a small orange plus sign) and 'Safety Reporting' (a blue circle with a white warning triangle icon and a small orange plus sign). A red arrow points from the text above to the 'New Questionnaire' icon. The 'Filter by' section below it contains four circular icons: 'Questionnaire' (a blue circle with a white list icon and a small grey circle containing the number '2'), 'Inspection' (a blue circle with a white checkmark icon), 'Action' (a blue circle with a white clipboard icon), and 'Incident Assessment' (a blue circle with a white warning triangle icon).

# Lead Declination

- Select OH\_LeadDeclination
- Complete and submit for review by BPA Occupational Health

The screenshot shows the OSHIS web application interface. On the left is a navigation menu with options: Home, My Dashboards, My Tasks, and Incident Reports. The main content area displays a 'Select a Questionnaire' dialog box. This dialog box contains two search input fields at the top. Below them is a list of questionnaire options, each with a code on the left and a description on the right. A red arrow points to the 'OH\_LeadDeclination' option, which is described as 'Lead Declination Questionnaire'.

Code	Description
IHRF	IH Request Form
JOB OBSERVATION	Job Observation
Leadership Engagement	Leadership Engagement
OH- Asbestos Exposure	Asbestos Exposure Questionnaire
OH_EMRESPQUEST	Employee Health History for Respirator Questionnaire
OH_HEARINGQUEST	Hearing Conservation Questionnaire
OH_LeadDeclination	Lead Declination Questionnaire
OH_MS_Evaluation	Medical Surveillance Periodic Health Evaluation Form



# Completed Questionnaires

- If you would like to view or print your completed questionnaires you can do so from the My Tasks, then select “Complete”.

The screenshot displays the 'My Tasks' section of a web application. On the left, a navigation sidebar includes 'Home', 'My Dashboards', 'My Tasks' (highlighted with a checkmark), and 'Incident Reports'. The main content area features a filter bar with 'Incomplete' and 'Complete' buttons, where a red arrow points to the 'Complete' button. Below the filter bar, a task card is visible with the following details: 'Questionnaire', 'Complete Hearing Conservation Questionnaire', 'Assigned To: Me', and 'Completed On 03/11/2021'. At the bottom right of the task card, there is a pagination control showing 'Items per page 20', '1 - 1 of 1', and navigation arrows.