OSHIS/Medical Surveillance Training for supervisors/managers of employees in medical surveillance
Medical Surveillance Appointments

• 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.

• The Scheduler has access to view your employees in surveillance, the surveillance they are due for and the date they are due. The Scheduler also has access to the approved Clinic List for appointments.

• The Scheduler has access to the Appointments module in OSHIS. The Scheduler is responsible for entering all appointment information into OSHIS prior to an employee's 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.
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
Log in to OSHIS. Supervisors must use this link to complete supervisor tasks, it is different that the link you use to complete tasks as an employee in medical surveillance:

https://bpa.cority.com

Login Name: BPA email

Enter Password: If this is your 1st time logging in click on the “Forgot Password” link, enter your BPA Email & then look for an email in Outlook to enter a password of your choosing
Quick Overview:

- The “Quick Links” box has a link to complete the Supervisor Respirator Questionnaire.
- The “Supervisor Respirator Questionnaire To Do List” box lists your employees in your group that require an updated Supervisor Respirator Questionnaire.
- The “Employees with Expired Surveillance” box lists your employees with expired surveillance.
- The “My Employees” box lists all of your employees in a surveillance exposure group (SEG).
- The “My Employees Surveillance Clearance” box lists your employees in surveillance, the surveillance exposure group they are in & their expiration/due date.
- The “My Employees Respirator Fit Tests” box lists your employees fit test information & their expiration/due date.
- The “My Employees Active Restrictions” box lists any of your employees with surveillance related restrictions (DOT, Respirator).
Use this link to submit updated Supervisor Respirator Questionnaires for your employees.

These employees require an updated Supervisor Respirator Questionnaire.

**Action:** Supervisor must submit an updated Supervisor Respirator Questionnaire.

These employees surveillance is expired.

**Action:** Contact your Scheduler and get an appointment scheduled.

These are your employees in a medical surveillance exposure group (SEG).
A view of your OSHIS Supervisor Dashboard

You can find your employees, their SEG’s & their expiration/due date here.

A red box indicates expired surveillance.

You can find your employee’s respirator fit test info here: respirator type & expiration/due date. If they are expired they are not cleared by OSHA to use a respirator. Fit tests are due annually.

Employee restrictions are listed here. You can not request that they use a specific respirator on the Supervisor Respirator Questionnaire if they have a restriction for it.
Completing the Supervisor Respirator Questionnaire

- When names appear in the “Supervisor Respirator Questionnaire To Do List” you need to click on the Supervisor Respirator Questionnaire link and submit an updated form for your employee. These are to be updated every 2 years, or more often as the employees respirator needs change.

- You can also use the Supervisor Respirator Questionnaire link to add or remove an employee from the Respirator Protection Program by completing the questionnaire.

- The type of respirator you pick on the form will determine if the employee requires respirator fit testing - it is important that you keep this form updated for your employees.
Completing the Supervisor Respirator Questionnaire

After you click on the Supervisor Respirator Questionnaire link you will be brought to the page shown below.

Click on “New”
1. Enter/select the employees name.
2. Click on “Save”.

Instructions:
1. Enter employee’s name for questionnaire to be completed.
2. Click Save.
3. Update responses.
4. IMPORTANT: Click Save under Response Header.

Employee: [Field for employee name]
Job Position: [Field for job position]
Date Of Response: 03/15/2021
Questionnaire: [Field for questionnaire]
Supervisor Respirator Questionnaire (CH_SUPERVISORQUESTION5)
Created By: [Field for user who created the questionnaire]
Created Date: [Field for creation date]
3. Complete the questionnaire.
4. Click on “Save & Close” at the top.
To view the Supervisor Respirator Questionnaires you have submitted:

1. Click on the Heart icon in the upper left corner.

2. Click on “Occupational Health – Questionnaire”. You can use the search fields to find a particular person, or to sort by date of completion.
Medical Surveillance Due Notifications

• 35 days prior to an employee's surveillance due date, the email notification on the following page will be sent to the supervisor & employee.

• The supervisor will need to ensure their employee follows the directions in the notification.

• If an appointment is not entered into OSHIS by the Scheduler, reminder emails of due surveillance will be sent out 7 days before the due date to the employee & supervisor, and again 1 day past the due date to the employee, supervisor & manager.
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 OSHIS /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 OSHIS 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
Medical Surveillance Appointment

• After an appointment is scheduled with a clinic & the Scheduler enters the appointment information into OSHIS the supervisor, employee & scheduler will receive an Outlook calendar invite notification (below).

• The employee **MUST** print & take this with them to their appointment, it is their clinic authorization.

To print, click on file, select print

This tells the clinic what tests are needed when they arrive for the appointment.

This tells the clinic where to send your results.
Supervisor is to ensure their employees take the following to the appointment:

- The Outlook email notification received which lists all authorized surveillance required at the appointment (Clinic Authorization, page 14)
- Any questionnaires required to be completed for Asbestos or Hazmat surveillance, if due for this surveillance (questionnaires available in OSHIS, per notification email)
  - 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 the surveillance if this information is not brought to the appointment