# A Vendor's Perspective

Presented by Kari Terwey, Placement Specialist Palmer Lake Placement Services, Inc.

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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	- 2
Name:	Firm:	
Address:	Attorney:	
	Address:	
Phone #:	Produces	
Cell #:	Phone:	
Email:	Cell:	
Cirian:	Fax:	
SSN:	Email:	
WID:	website:	
Claim #:	website:	
DOB	Paralegal	
T-7-7	Paralegal	
DOI AWW		
AWW		
ELAN CHER		
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		
ritoric		

# 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:  ddress:  Phone:  DRC:  Placement Specialist:  Start Date:  Farget Date:	WID#: Insurer: Adjuster: Claim #: Attorney: Average Weekly Wage:	during his/her job seeking efforts. The JPP/ the service provider's ability to perform in th not necessarily mean non-cooperation, and  COMMENTS, EXCEPTIONS OR SE	A should reflect the reality of the employee's ability to enge e current labor/job market. A disagreement with the items I each may be negotiated and modified.  PECIAL CIRCUMSTANCES TO JPPA:	age in job seeking and
OCATIONAL TARGETS:				
DATA SUBMITTED BY QRC:				
Medical Release defining physical limitations.	Training in Job Seeking Skills			
List of Transferable Skills Vocational Testing or Evaluation  EMPLOYEE EXPECTATIONS:	Labor Market Analysis	the Placement Specialist to discuss my inju Specialist to follow up with employers for v	vities to secure suitable employment, I, the employee, auth ry with prospective employers. I also authorize the QRC whom I have received job leads to perform job developm	and/or the Placement
Full-time job search, 6-8 hours per day, 5 Part-time job search, hours daily, 1-2 Applications/Resume submitted daily Contact with QRC/PS twice weekly	days per week	employability.		
20-25 telephone calls to employers per w 1-2 interviews arranged weekly, as possi Immediate follow-up on all job leads Job search up to a 50-mile radius Submit job logs with complete document. Register with the nearest Job Service Off	ble	Date	Employee's Signature	
EMPLOYMENT SPECIALIST EXPECTATION	<u>S:</u>	Date	QRC Signature	QRC#
Providing Job Leads to the Employee on Submitting a Placement Report every 30 Weekly Phone Contact, and Periodic Me	Days			
Daily Log of Activity		Date	Placement Specialist Signature	Vendor#
NSURER EXPECTATIONS:				
Reimbursement for Mileage Expenses Reimbursement for Long Distance Phone	e Calls			
		Date	Insurer Signature	

## New Example:

## JOB PLACEMENT GUIDE

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

## **VOCATIONAL TARGETS:**

are modified as needed.

sı	SUGGESTED EMPLOYEE EXPECTATIONS:		
_	FULL-TIME JOB SEARCH: (Optimal Expectations)		
	Encouraged to complete 100-140 job log entries per month or job the areas listed below.	ob log entries per day. These entries include a variety of contacts in	J
	PART-TIME JOB SEARCH: (Optimal Expectations)		
	Encouraged to complete 80-100 job log entries per month or 4-5 job log e	intries per day. These entries include a variety of contacts in the areas	ŀ
	listed below. (Check All That Apply)		
	Cold Calls	In Person Contacts	
	Submitting Applications/Resumes	Interviewing	
	Reviewing Newspapers and Websites	Follow-up Contacts to Employers	
	Letters Received from Employers  Job Search up to a 50-Mile Radius	Submitting Job Logs on a Weekly Basis  Meetings/Phone Contacts with Placement Specialist	
	Registering the Minnesota Workforce Center	Registering with Temporary Agencies	

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

COMMENTS, EXCEPTIONS OR SPECIAL CIRCUMSTANCES TO THE PLACEMENT GUIDE:

Reviewed and Completed with Employee by:

INSURER EXPECTATIONS:

**EMPLOYMENT SPECIALIST EXPECTATIONS:** 

\_\_\_Reimbursement for Mileage Expenses

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

\_\_\_\_Weekly Phone Contact, and Periodic Meetings with the Employee

Date:

\_\_\_Daily Log of Activity

Submitting a Placement Report every 30 Days

\_\_\_Reimbursement for Long Distance Phone Calls

# 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

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



DO NOT USE THIS SPACE

This form must be provided to the employee. (Minn. Rules 5221.0410,I subd. 6)

Reset

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.

VID number or SSN		Date of injury	Date of birth			
mployee						
mployer						
nsurer/Self-insurer-TPA						
nsurer claim number						
ate of most recent exa	mination by this of	fice				
elect the appropriate o	ption(s) below and	fill in the applica	ble dates.			
. Employee is at	ole to work without	restrictions as of			(date)	
Employee is at	ole to work with res	trictions, from		(date)	to	(date)
The restrictions	are:					
. Employee is ur	nable to work from			(date) to _		(date)
he next scheduled visit	tis: as neede	d OP				

# 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 <a href="mailto:mike.hill@state.mn.us">mike.hill@state.mn.us</a> or 651-284-5153.

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

## R-3 Rehabilitation Plan Amendment

1. WID number or SSN EE-01-6168-798	2. Date of injury 07/01/2019					
Date of first consultation in person or telephone meeting (#29 on R-2)     07/26/2021						
Employee name     Jan Process			ne ib			
5. Insurer/self-insurer/TPA Uat Another One			9. QRC address 445 Test St			
6. Insurer claim number UatJan141		City Saint Paul			State MN	ZIP code 55101
7. Employer name Uat Regression Co		10. QRC # 0700	11. QRC firm # 5309		C phone nu 55-5888	mber
13. Change of QRC No		14. Withdra	wal of QRC No			
Previous QRC #	New QRC #					

15. Proposed amendment and rationale (attach separate sheet as necessary)
To extend the rehabilitation plan date and cost. Ms. Labor is release to RTW with sedentary duty limitations. Job development, by agreement, and placement are continued with Perfect Placement Services. The insurer has been recontacted about approval of computer classes to enhance Dolly's job skills.

16. Employee comments (if any)

17. QRC is to complete all service areas to be provided during the period covered by this R-3

Service category	Description	Projected cost	Projected completion date
00 - Rehab Consultation			
		\$0.00	
01 - Medical	Attend med appts, med related communications, etc.		
Management		\$100.00	11/30/2025
02 - On-Site Job Analysis	Possible job analysis related to job search and/or OJT		
		\$300.00	11/30/2025
03 - Coordinate RTW Same ER			
		\$0.00	
04 - Job Modification			
		\$0.00	
05 - Functional Capacity Eval			
		\$0.00	
06 - Transferrable Skills Analysis			
		\$0.00	
07 - Work Evaluation			
		\$0.00	
08 - Work Hardening/Adj.			
		\$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 OB	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. [QRC costs then added to this category]	\$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@plosmn.com

Employee: Insurer:

 WID:
 Adjuster:

 DOB:
 Email #:

 DOI:
 Claim #:

 Vendor #:
 1118
 Employer:

 QRC Firm:
 Attorney:

 QRC:
 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*	-	-

<sup>\*</sup>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 Express Employment- discussion of positions available through the staffing agency. He has not received any potential jobs or opportunities from them.

03/29/2024

Page 4

Placement Progress Report -

03/29/2024

Page 3

In-Person Interviews:

12/21/23 Menards for a stocker position.

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
Goobler 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. did not have the required education or 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 to review and discuss his job search efforts. My next report will follow within 30-45 days.

Submitted by,

Kari Terwey

Kari F Terwev

## NOT REVIEWED TO EXPEDITE DELIVERY

Ce:

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.
<a href="mailto:kterwey@plpsmn.com">kterwey@plpsmn.com</a>
763-497-1430 Office
612-718-6819 Cellular