IBI Conference

Exploring Alternative Return-to-Work Strategies
Presenters

- **Heidi Bimrose**, CRC, CEBS
  Unum
  Workforce Solutions Director

- **Tony Bohn**, Chief Human Resource Officer
  Norton Healthcare

- **Bob Patterson, M.P.T., MBA, C.A.E.**
  Briotix
  Founder/CEO
Norton Healthcare

- Kentucky’s 1st and only recipient of the National Quality Healthcare Award presented by the National Quality Forum

- Norton Healthcare includes:
  - 5 large hospitals with a total of 1,837 licensed beds
  - 140 locations of service in Metro Louisville and Southern Indiana
  - 12 Norton Immediate Care Centers
  - 104 physicians practice locations
  - 13 Outreach satellite clinics

Over 14,100 employees strong
Briotix - Onsite Absence Solutions

- Based in Centennial, CO
  - Servicing a wide variety of industries with a customized service mix
  - Integration into client structure based on service mix
  - Collaboration and integration with client departments including
    - Human Resources administration
    - Workers’ Compensation administration and third party administrators
    - Leave administration
    - Operations teams/process improvement
    - Safety, Health and Wellness
    - Benefits
- Provide Early Symptom Intervention & RTW Services

Providers credentialed in 45 states and 54 countries
Unum is the leading provider of group and individual disability benefits in the U.S.¹

<table>
<thead>
<tr>
<th>Workforce Solutions Group</th>
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<tr>
<td>Experienced absence management resource partner</td>
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**Lost time impact analysis** – Share insights gained from the largest private disability database in the U.S., second only to Social Security¹

**Workforce challenge studies** & On Site Visits
Apply data and experience

**Program design and monitoring:**
- Health management engagement
- Return-to-work and stay-at-work services
- Worksite modification
Cost of absence

The stakes are higher for hospitals

- **Operating Costs Pressures**: Replacing absent employees is costly and may cause the hospital to rely on replacement workers that are less productive. Labor typically accounts for almost 60% of operating costs\(^1\)

- **Clinical Quality**: Employee absences impact team performance, cause higher patient loads and disrupt the continuity of care.

- **Patient Satisfaction**: Handoffs in patient care due to absences can be very disruptive to the evolving nurse/patient relationship.

- **Employee Morale and Engagement**: Employees must cover for the co-workers’ absences, leading to decreased job satisfaction and engagement.

- Understaffing is a leading cause of **Nurse Burnout** which, in turn, is associated with higher rate of hospital acquired infections

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   Incidence rates are based on Unum block data, YE 2015
The Good News: Return to Work (RTW) programs help employers avoid persistently long disability claim durations. RTW resources disrupt the persistence in year-over-year claim durations – especially for companies starting from a high baseline.

The Bad News: Many employers are missing out on the benefits of RTW programs. In spite of the clear advantages for managing disability durations, half of 256 employers surveyed had no RTW resources. Most employers with RTW programs lacked resources directly focused on managing non-occupational disability cases.

Percentage of Companies with...

- 40% Formal RTW resources for non-occupational disability incidents
- 41% Tools to help supervisors manage their employees’ RTW process
- 47% Workplace accommodation policies for employees returning from leave
- 48% Any RTW resources, accommodation policies or supervisor tools
Cause for Alarm

RTW Case:
Mary, a radiology tech, broke her wrist
Mary requested to return 2 weeks early with modifications.
Mary’s supervisor said she had to be 100% & did not want to risk a WC claim

What is wrong with this Picture?
- There is not a resource to review accommodation requests or workstations
- There was not an up to date job analysis of physical requirement of key jobs
- The supervisor is following an “All or Nothing” RTW policy
- The supervisor may be violating the ADA by not returning Mary to her clerk position.
Challenges at Norton healthcare

No RTW Culture

- Benefits Silos
- High Orthopedic Incidence
- Lack of Manager Buy-In
- No Dedicated RTW Resource
Partnerships Drive Solutions

- No RTW resource or updated physical demands
- Need to control absences
- Lack of RTW culture

Unum
- STD duration management
- Disability & leave trend analysis
- Absence Solutions

HR

Briotix
- On-site resource
- Transitional RTW support
- Job description/job analysis development
Critical elements of successful RTW programs

- Structural Elements
- Partnerships
- Dedicated Resources
- Plan design
- Leadership
- Culture

Communication

Communication
Building the Case

- Quantify the positive financial impact a RTW program can have on your staffing costs (and revenues for healthcare organizations)
- To the extent possible, tie development of RTW program to your organization’s mission, vision, and values
- Identify resources that can champion the RTW program

Absent Employees → Puts Strain on Other Staff → Impacts Patient Care
Use of Data Analytics

STD Non-Pregnancy Claims

STD Claims by Job Title

STD Claim Duration by Location
Changing the Culture

Collaboration with the Right Partners

- HR
- Corporate Communication & Marketing
- Employee Health/Safety
- Departmental Leadership
- Health & Wellness
RTW Targets: Decide where to focus efforts

Location
- Main Hospital
- Children’s Hospital
  - 34% of STD claims

Condition
- Musculoskeletal
- Injury
- Cancer
  - 35% of STD claims

Occupation
- RNs
- Patient Care Services
  - 46% of STD claims

Lost Time Study performed by Unum to determine absence drivers
What are the goals?

- Decrease lost work days
- Decrease impact of disability
- Impact employee presenteeism and productivity
- Foster environment of expectation and support
- Increase impact of Stay at Work and RTW Services
- Identify and engage with employees before they would typically be targeted for RTW/SAW
- Enable 1x1 contact to increase efficacy of programs
Duration Management

- Return to Work Job Coaching
- Return to Work Handshake
- Stay at Work Coaching
- Planned Leave Management
- Worksite assessment and ergonomic services
RTW Resource Partnership

Claim Identification

• Identification of claims by Unum team

Roundtable Review

• Joint Unum/Briotix roundtable to identify referrals and opportunities for RTW resources

RTW Intervention

• On site assessment, RTW coaching & identification of RTW opportunities
Referrals by Condition

**Services focused on the highest claims exposure populations**

**Referrals by Diagnostic Group**

<table>
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<tr>
<th>Condition</th>
<th>Referral Count</th>
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<tbody>
<tr>
<td>Orthopedic</td>
<td>70</td>
</tr>
<tr>
<td>Illness</td>
<td>5</td>
</tr>
<tr>
<td>Cancer</td>
<td>3</td>
</tr>
<tr>
<td>Behavioral Health</td>
<td>2</td>
</tr>
<tr>
<td>Circulatory</td>
<td>1</td>
</tr>
<tr>
<td>Pregnancy</td>
<td>0</td>
</tr>
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</table>

**Referrals By Job Class**

<table>
<thead>
<tr>
<th>Job Class</th>
<th>Referral Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>RN</td>
<td>30</td>
</tr>
<tr>
<td>Patient Care Services</td>
<td>20</td>
</tr>
<tr>
<td>Supervisor</td>
<td>15</td>
</tr>
<tr>
<td>Clinical Professional</td>
<td>10</td>
</tr>
<tr>
<td>Non-Patient Care</td>
<td>7</td>
</tr>
<tr>
<td>Other Professional</td>
<td>3</td>
</tr>
<tr>
<td>Clerical</td>
<td>1</td>
</tr>
<tr>
<td>Technician</td>
<td>0</td>
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Services focused on the highest claims exposure populations.
1,226 Total Lost Workdays Avoided

Among the cases that were engaged and for which the STD claim has closed, Norton Healthcare avoided 1,226 Lost Workdays (annualized).

Methodology to determine if a Lost Workday has been avoided:

\[
\text{Initial projection of days duration} - \text{Actual claim duration} = \text{Lost Workdays Avoided/Added}
\]
Early Stage Savings

Lost Workdays Avoided by Diagnosis

- Musculoskeletal: 356
- Behavioral Health: 93
- Injury: 65
- Other: 45
- Pregnancy: 45
- Circulatory: 26
- Tumor: 16

1,226 Total Saved Lost Workdays

$198,612 Direct Savings from Avoiding Lost Workdays

Assumes average annual salary of $60,000

$60,000/year ÷ 260 workdays = $231/day

$231/day x 70% benefit = $162/day

$162/day x 1,226 days = $198,612
Early Stage Impact on STD

<table>
<thead>
<tr>
<th>Quarter</th>
<th>2015</th>
<th>2016</th>
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</thead>
<tbody>
<tr>
<td>Q2</td>
<td>11,120</td>
<td>10,766</td>
</tr>
<tr>
<td>Q3</td>
<td>12,004</td>
<td>11,072</td>
</tr>
<tr>
<td>Q4</td>
<td>12,474</td>
<td>11,342</td>
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Lost Work Days/Quarter

Implementation Date
Annualized Savings through Engagement

<table>
<thead>
<tr>
<th>Savings</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Savings</td>
<td>$198,612</td>
</tr>
<tr>
<td>Indirect Savings</td>
<td>$566,412</td>
</tr>
<tr>
<td>Total Savings</td>
<td>$765,024</td>
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**Indirect savings are savings from:**

- Placing/training replacement worker
- Reduced productivity among full staff to accommodate missing co-worker or support temporary replacement worker
- Potential overtime charges for other staff to cover hours missed by employee on leave
- Replacement workers are less productive than regular staff who are part of cohesive team.

**Annualized Savings**

$\approx$765,024

(assuming continuation of current rate of lost workdays avoided)
Prevention – Stay at Work Services

- Increase in request with launch of employee communication and Insight article
- Prevention Focus on addressing acute and chronic symptoms reported
- Preventive worksite analysis and coaching
- Coaching and behavior change recommendations are #1 recommendation during worksite visits
**Recommendations**

- 2 Chairs
- 1 desk
- 4 gel wrist pads
- 8 document holders
- 8 keyboard trays
- 30 footrests (lower cost solution compared to providing new chair...similar result)

**Environmental Trend Identified:** many desks are too high which could be addressed with keyboard trays or raising seat/provide footrest
Key to Success

• Needs Analysis and Appropriate Service Application
• Manager Collaboration with Onsite Services
• Leadership support to encourage:
  • Managers and supervisors to support and interact with the Briotix Prevention Specialist
  • Employees to interact with the Prevention Specialist
  • Early reporting of symptoms
  • Prevention Specialist participation in Safety and Staff meetings
  • A staff level manager to ‘debrief’ with the Prevention Specialist weekly
RTW Success

Job: Cardiac Tech

R&L’s: Lifting Restriction from Rotator Cuff repair

Services from Briotix Consultant:
• Assessed employee’s recovery
• Outreach to physician to review work duties, capacity and RTW opportunities
• After outreach, the physician adjusted lifting restrictions to match recovery
• Educated employee’s manager on the RTW process and discussed the employee’s restrictions in relation to the job demands

Outcome: The employee was accommodated, and returned to work 3 weeks early
3 Employee injuries reported at the transfer site into the temporary MRI trailer.

An Ergo Evaluation of the transfer of patients activity on and off of the ramp at the temporary MRI was assessed.

Risks to patients and staff were identified.

Recommendations for remediation made & implemented.

No further incidents.
Return on Investment

$765,024
Total Program Savings (annualized)

$234,252
Program Cost (annualized)

3.2 : 1 ROI

The initial pilot year has generated significant savings based on measurable reductions in Lost Workdays.
An investment that reduces lost workdays and improves employee engagement.

A productivity multiplier for employers that takes the burden off the HR department.

A visible and consistent message to employees that their employer will support them as they manage and recover from a disability.

A proactive approach that will identify employees at risk.

A trusted source of information that will engage with employees to understand their needs, limitations, and capability.

Question: How do you manage RTW planning, job assessments, ERGO evaluations, workplace accommodations—including implementation and ongoing management?