

MEDICAL SERVICES

PROVIDED ON BEHALF OF THE DEPARTMENT FOR WORK AND PENSIONS

COPY

- Training and Development Unit

IB Pathways LiMA V3 Technical Manual

MED-IBPW~001(e)

1 Final

Document control

Superseded documents

MED-S2/IB/REF~001(g) LiMA Technical Manual CR1 (PCA-IBR)rev Supplement

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Contents

1. LiMA: How To Produce a Capability Report	4
1.1 Claimant Details	4
1.2 Navigation	4
1.3 Diagnosis Descriptions	5
1.4 Significant Impact On Function	6
1.5 Social and Occupational History	7
1.5.1 Claimant Age	7
1.5.2 Occupational History	7
1.6 Aids and Appliances	9
1.7 Current Treatment and Probable Functional Outlook	10
1.7.1 Current Treatment	10
1.7.2 Probable Functional Outlook	10
1.8 Work Related Health Issues and Other Work Related Issues	11
1.8.1 Work Related Health Issues	11
1.8.2 Other Work Related Issues	11
1.9 Workplace Adjustments	12
1.10 Work Related Capability	13
1.11 MH Summary, Documents Studied and Advice on Referral	14
1.11.1 Mental Health Summary	14
1.11.2 Documents Studied	14
1.11.3 Advice on Referral for Vocational Rehabilitation Services	15
1.12 Review Screen	15
1.13 Exemption	15
Appendix A - Overview of IB85 to CR1 Data Transfer	16
Observation Form	17

1. LiMA: How To Produce a Capability Report

1.1 Claimant Details

The requirement to complete a CR1(PCA-IBR)rev will usually have been recorded on SMART and transferred to LiMA along with the other claimant details.

If the claimant details are **not** found when you type in the NiNo, then, assuming that the NiNo has been entered correctly, you should proceed to enter the following details manually.

LiMA

→ Goto Case Session Help

Claimant not found - Enter Claimant Details

NiNo	AB123456C
Surname	Brown
Forename	William
DOB	23/07/1953 (dd/mm/yyyy)
CR1 (PCA-IBR) rev Required?	<input checked="" type="checkbox"/>
MSEC	Stockport

Save Cancel

14:04

Date of birth is a new requirement for all manually entered cases. Use the correct date format: dd/mm/yyyy.

'**CR1(PCA-IBR)rev required?**' is the option box to indicate whether or not a Capability Report will be completed for this customer. Ticking the box will trigger LiMA to present several additional screens to gather the necessary information, and certain phrases will also become mandatory if a CR1 is required.

1.2 Navigation

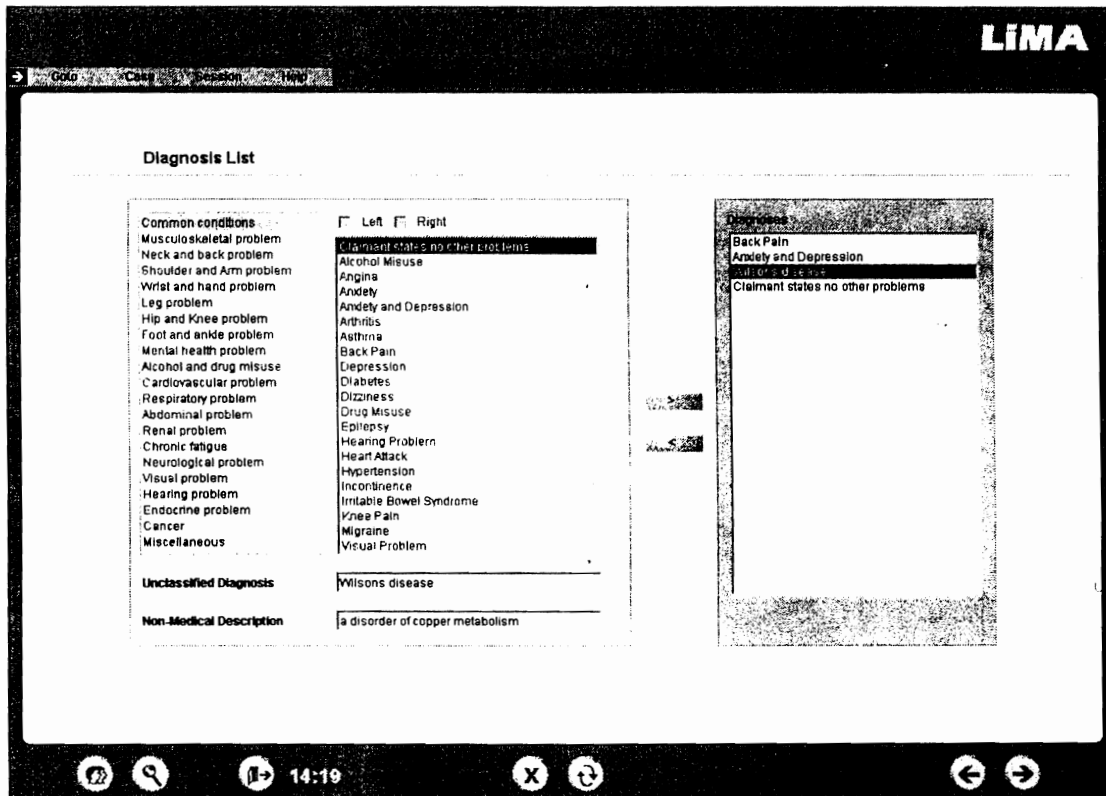
During a CR1 case, the Map and the Goto Menu will include links to the CR1 sections of LiMA.

Medical Services

1.3 Diagnosis Descriptions

Some uncommon diagnoses now have a plain English description that will be printed in the CR1(PCA-IBR)rev. These will be added automatically and can be seen on the Review screen.

Any unclassified diagnoses that you type into the text box at the bottom must also have an associated non-medical description to aid the Personal Adviser.



1.4 Significant Impact On Function

Each diagnosis that the claimant presents with will have a different impact on their functional ability. Some conditions are very disabling whilst others cause little or no functional impairment. It is good practice to include an appropriate amount of detail for each diagnosis, describing its history, (duration, severity, management etc.), and the functional effects (including variability).

LiMA

File Case Session Help

Diagnosis History

Select Diagnosis From List

- Back Pain
- Anxiety and Depression
- Wilsons disease

History of condition

Duration

Progress

Well Controlled

Functional Effects

Self Treatment

GP Treatment

Attends GP Clinic

Hospital Treatment

The condition started many years ago.
This condition is well controlled and would not be expected to cause any significant functional impairment.

Significant Impact on Function Yes No

14:23

For CR1 cases, you have to tell LiMA whether each of the diagnoses you have entered has a 'Significant Impact on Function'. Click on either the 'Yes' or 'No' radio buttons at the bottom of the Diagnosis History screen. This information will be used to format the contents of the CR1(PCA-IBR)rev report, but it does not have any effect on the IB85 report.

LiMA will remind you if you forget this additional step for any of the diagnoses.

1.5 Social and Occupational History

Social and Occupational History

Social History

Accompanied By: Interpreter
Claimant Age: Currently aged 50 years

Lives With Who?
Lives With Children
Lives Alone

Type Of Home
*Stairs Difficulty
*Sleep Location
Toilet Location
Sleeps Rough

Acts As Carer

Occupational History

Never Worked

Date Last Worked
Occupation & Tasks
Hours Worked
Reason For Leaving

Handedness
Current Work
Current Study

1.5.1 Claimant Age

Although Claimant Age is a required phrase, LiMA will automatically calculate it from the claimant's date of birth, and enter it into the report for you.

However, if the Claimant Age phrase is deleted, LiMA will detect this, and will require that the phrase be replaced before the report can be authorised.

1.5.2 Occupational History

Several of the phrase templates will be highlighted in red if a CR1 is required. This is to ensure that information will always be available to complete Section 1 of the CR1(PCA-IBR)rev.

The phrase templates for each of the four occupational history questions are shown below. This requirement is removed if 'Never Worked' has been selected.

'Handedness' is a mandatory phrase because the information is needed in Section 4 of the CR1(PCA-IBR)rev.

Medical Services

Date Last Worked

2 Variable Selector - Web Page Dialog

{{Stopped work [VagueNumber] [VaguePeriod] ago. [Stopped work [Duration] ago. [Has not worked [NoWorked].}}
 Stopped work several years ago.

A [VagueNumber] X a few several many
 [VaguePeriod] X days weeks months years

B [Duration] year(s) month(s) week(s) day(s)

C [NoWorked] X In the last 5 years

Add

Occupation and Tasks

2 Variable Selector - Web Page Dialog

Last occupation: [JobName] This required the following task(s): [WorkTask1]
 Last occupation: labourer. This required the following task(s): climbing stairs, heavy lifting and using machinery.

[JobName] X bar staff builder care assistant cleaner clerical assistant driver electrician engineer factory worker gardener labourer manager miner nurse plumber postal worker restaurant staff shop worker teacher unemployed

[WorkTask1] sitting for long periods standing for long periods walking long distances climbing stairs light carrying heavy lifting repetitive physical tasks using machinery driving writing computer-based work clerical work using the phone dealing with colleagues serving customers handling money preparing food cleaning

Add

Hours Worked

2 Variable Selector - Web Page Dialog

{Worked for [Hours] hours per week. [Work hours: [Work_Hours]}
 Worked for 18 hours per week.

[Hours]

[Work_Hours] X full-time not applicable

Add

Reason for Leaving

2 Variable Selector - Web Page Dialog

{{The main reason for leaving work was [MHLLeavingReason]. [The main reason for leaving work was [LeavingReason]. [The main reason for leaving work: [NotApplicable].}}
 The main reason for leaving work was redundancy.

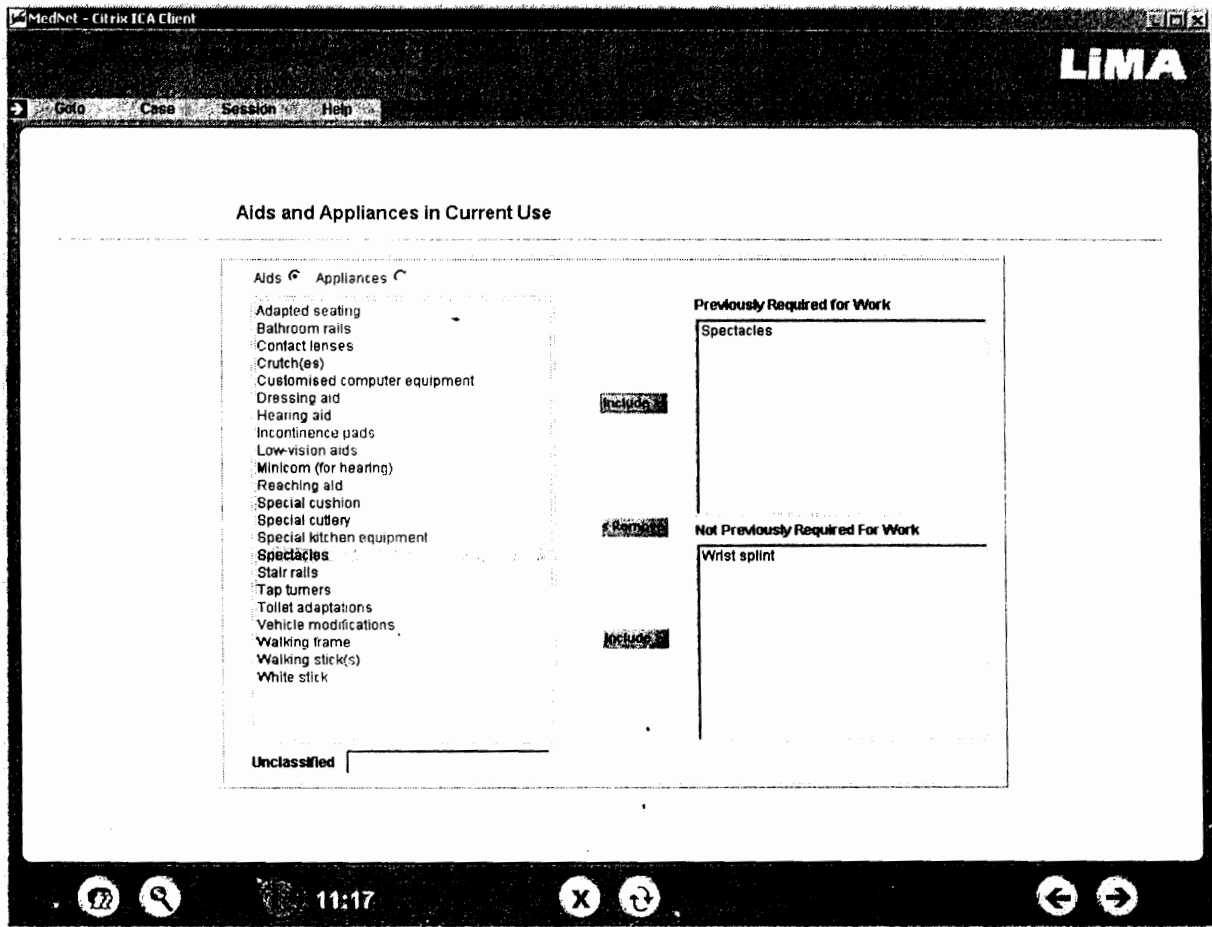
A [MHLLeavingReason] X mental health stress work-related stress anxiety depression alcohol problem drug problem

B [LeavingReason] X redundancy end of contract being sacked family pregnancy housing social neck pain upper limb problem back pain lower limb problem poor vision poor hearing poor speech epilepsy incontinence injury physical health

C [NotApplicable] X not applicable

Add

1.6 Aids and Appliances



Aids and appliances are held in two lists displayed in the left hand column. Use the radio buttons above the list to switch between 'Aids' and 'Appliances'.

An 'aid' is a piece of equipment that supplements the existing functional ability.
An 'appliance' is a piece of equipment that replaces the lost function.

Although the distinction between aids and appliances is not absolute, it does provide a convenient means of keeping the lists to a manageable size.

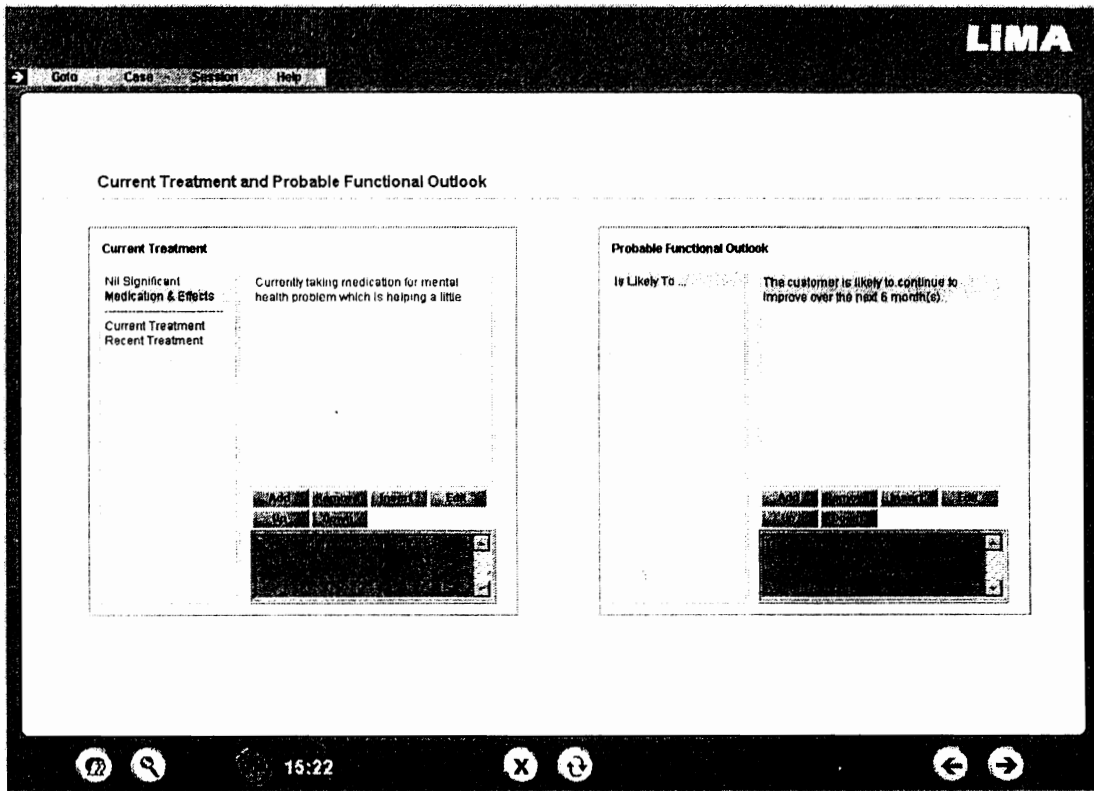
Select an item and then click the appropriate 'Include' button to transfer the text into one of the two boxes on the right.

Aids and appliances in current use that were **previously required for work** should be added to the top box.

Those that are **currently in use** but were **not previously required for work** should be added to the bottom box.

Any item not found in the lists can be entered using the free text 'Unclassified' box at the bottom of the screen.

1.7 Current Treatment and Probable Functional Outlook



1.7.1 Current Treatment

The left half of this screen is used to populate the first part of Section 7 of the CR1(PCA-IBR)rev.

Any relevant phrases from the history will appear here automatically. These should be regarded as a prompt, although in some cases they may be suitable for the Personal Adviser (PA). Remember that the CR1 report must not contain medical jargon.

The standard phrase templates should be used to summarise the claimant's current treatment and to replace any text that might not be understood by the PA.

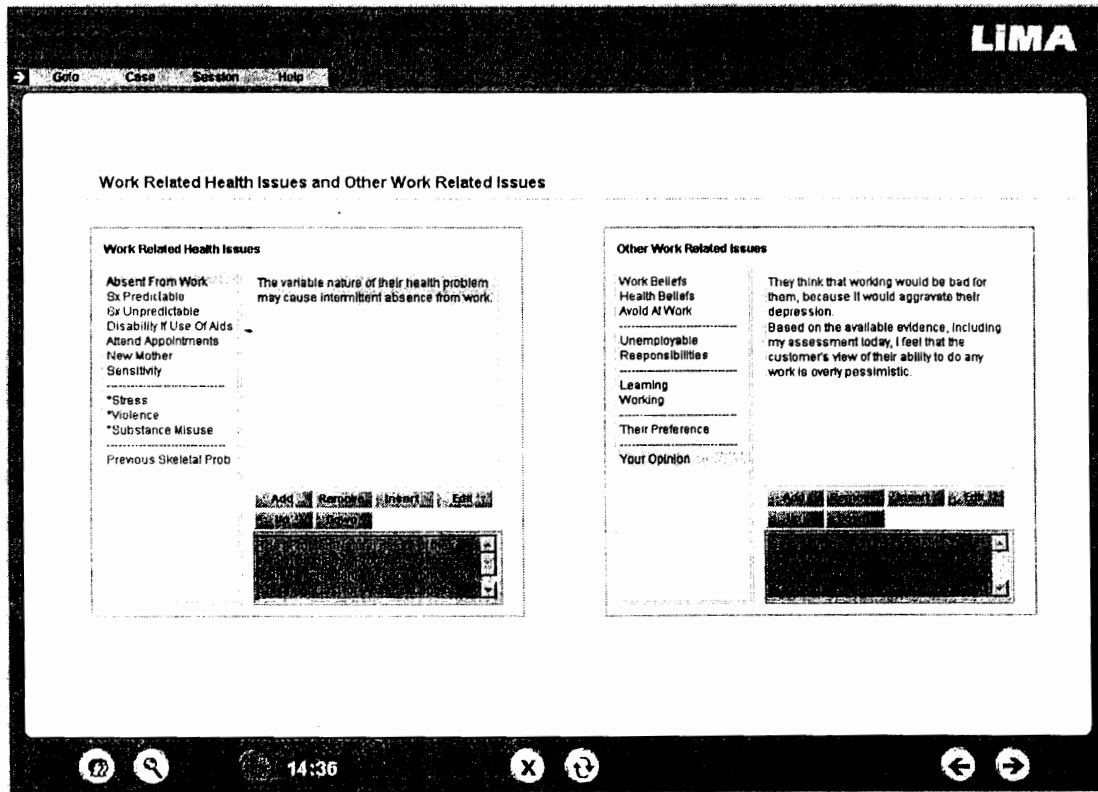
1.7.2 Probable Functional Outlook

The right half of this screen is used to populate the second part of Section 7 of the CR1(PCA-IBR)rev.

The prognosis justification and any relevant phrases from the history will appear here automatically.

The standard phrases can be used to supplement or modify the advice. Bear in mind, though, that it must not be inconsistent with the advice given in the IB85.

1.8 Work Related Health Issues and Other Work Related Issues



1.8.1 Work Related Health Issues

The left half of this screen is used to populate the third part of Section 7 of the CR1(PCAI-BR)rev.

The standard phrases should be used to provide suitable advice.

The first group of phrases are generic and always available. Following this, a number of other suggested phrases might appear in the list. These will vary depending on the type of case. Some may be asterisked to indicate particular importance.

1.8.2 Other Work Related Issues

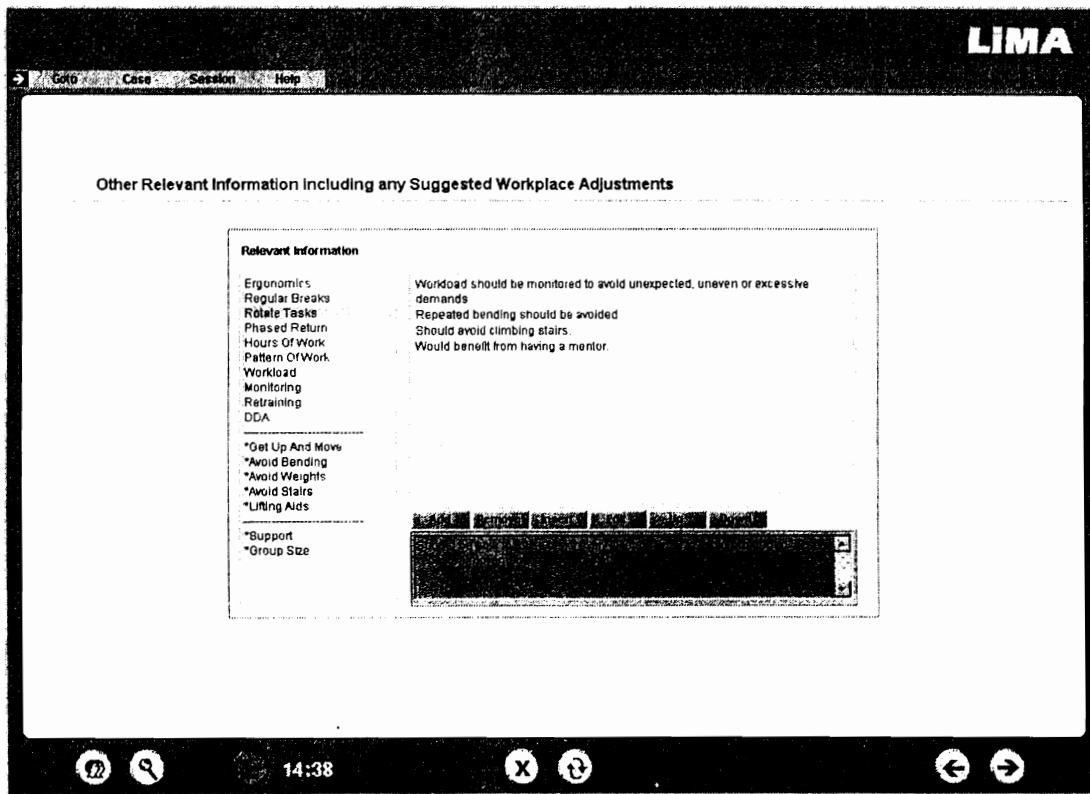
The right half of this screen is used to populate Section 6 of the CR1(PCAI-BR)rev.

Any relevant phrases from the history will appear here automatically.

The standard phrase templates may be used to provide additional advice about the claimant's attitudes and beliefs about work.

Remember to include your own opinion as well as recording the claimant's views.

1.9 Workplace Adjustments



This screen is used to populate Section 8 of the CR1(PCA-IBR)rev.

Use the standard phrase templates either to add suitable text or as an aide-memoir to help you provide alternative advice.

1.10 Work Related Capability

The screenshot shows the LIMA software interface for the 'Work Related Capability' assessment. The title bar includes 'LIMA' and a menu with 'Gold', 'Case', 'Session', and 'Help'. The main content area is titled 'Work Related Capability' and contains the following sections:

- Is there functional limitation in the following areas:**
- Preparing For Work**
 - Preparing For Work: Yes No
- Managing Work Tasks**
 - Negotiating Work Environment: Yes No
 - Understanding Simple Instructions: Yes No
 - Handling Small Objects: Yes No
 - Using Office Workstation: Yes No
 - Driving / Operating Machinery: Yes No
- Interaction and Awareness**
 - Interacting Effectively: Yes No
 - Awareness of Potential Dangers: Yes No
- Stamina**
 - Sustaining Sedentary Work for 3 hours: Yes No

On the right side, there is a 'Comments' section with a 'Workstation' label and a text area containing the comment: 'They will have moderate difficulty working at an office workstation due to their poor vision'. Below the text area is a small thumbnail image of a workstation.

The bottom of the screen features a navigation bar with icons for back, forward, search, and a clock showing '14:39'.

This screen is used to populate Section 5 of the CR1(PCA-IBR)rev.

Each work-related capability area has a 'Yes' / 'No' selector and a corresponding phrase template that appears in the phrase list if 'Yes' is selected.

All but two of the areas are linked to one or more IB85 descriptors (mental and physical) so that the default selections chosen by LiMA will usually be correct. It is possible to manually over-ride LiMA's choices but this should only be done when there is a good reason.

Use the available phrase templates to describe the work-related capability as accurately as possible. Alternatively, type information into the free text area at the bottom of the screen.

N.B. If you go back and edit the IB85 report and change any of the descriptors, LiMA **will not** re-derive the correct selections in the CR1. **These must be checked manually.**

'Driving and Operating Machinery' and 'Ability to Sustain Sedentary Work' are not linked to any descriptors and should be selected manually. You will not be allowed to proceed if you forget to make a selection for either of these two areas.

1.11 MH Summary, Documents Studied and Advice on Referral

The screenshot shows the LiMA software interface. At the top right is the 'LiMA' logo. Below it is a menu bar with 'Getto', 'Case', 'Sesión', and 'Help'. The main content area is titled 'Mental Health Summary, Documents Studied and Advice on Referral'. It is divided into three sections: 'Mental Health Summary' with three radio button options: 'No problems to only mild problems' (selected), 'Constant moderate problems', and 'Constant severe problems'; 'Documents Studied' with two checkboxes: 'Med 4' (checked) and 'IB113' (unchecked), and a text input field for 'Others (please specify)'; and 'Advice on Referral for Vocational Rehabilitation Services' with a paragraph of text and two radio button options: 'Agree' (selected) and 'Disagree'. At the bottom of the window is a taskbar with a clock showing '15:35' and several navigation icons.

1.11.1 Mental Health Summary

If the MHA was not completed or scored below 6 points, LiMA will default to option 1, but will allow option 2 to be selected. Option 3 will be unavailable.

If the MHA score was in the range 6 to 9 points, LiMA will default to option 2, but will allow option 1 to be selected. Option 3 will be unavailable.

If the MHA score was in the range 10 to 15 points, LiMA will default to option 2, but will allow option 3 to be selected. Option 1 will be unavailable.

If the MHA score was more than 15 points, LiMA will default to option 3, but will allow option 2 to be selected. Option 1 will be unavailable.

The IB85 mental health summary will automatically be re-used in the CR1(PCA-IBR)rev report.

1.11.2 Documents Studied

Click the check boxes to indicate which documents have been studied. Type the names of any other document into the free text area labelled 'Others: (please specify)'.

Medical Services

1.11.3 Advice on Referral for Vocational Rehabilitation Services

LiMA will default to 'Disagree' (i.e. fit for rehabilitation) unless one of the Exceptional Circumstances (NFDs) applies, in which case it will default to 'Agree'.

However, please note the following points:

Not every customer, for whom an NFD can be applied, will be unfit for vocational rehabilitation. Some might find it very beneficial.

On the other hand, a customer may be unfit for vocational rehabilitation even though none of the Exceptional Circumstances applies.

You should consider each case carefully and decide whether your training would lead you to a conclusion that is different to LiMA's suggested answer.

1.12 Review Screen

The CR1 information is displayed at the end of the IB85 report.

Although the spelling checker will automatically run when you first visit this screen, you should run it again manually if you subsequently make any changes to the report.

1.13 Exemption

If you exempt the claimant from the PCA, then it is not necessary to complete a CR1 report.

Observation Form

Please photocopy this page and use it for any comments and observations on this document, its contents, or layout, or your experience of using it. If you are aware of other standards to which this document should refer, or a better standard, you are requested to indicate this on the form. Your comments will be taken into account at the next scheduled review.

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