COPY

- Training and Development Unit

IB Pathways
LiMA V3 Technical Manual

MED-IBPW-001(e)

1 Final
Medical Services

Document control

Superseded documents

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

Version history

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Final</td>
<td>10th November 2005</td>
<td>Signed off by MP&amp;CT</td>
</tr>
<tr>
<td>1c (draft)</td>
<td>4th November 2005</td>
<td>QA by Dr Moira Henderson</td>
</tr>
<tr>
<td>1b (draft)</td>
<td>24th August 2005</td>
<td>Nil comments from internal QA panel comprising of Dr Angela Graham, Nigel Goldstein and Dr Gill Buchanan</td>
</tr>
<tr>
<td>1a (draft)</td>
<td>19 August 2005</td>
<td>Initial Draft</td>
</tr>
</tbody>
</table>

Changes since last version

Outstanding issues and omissions

Issue control

Owner and approver:

Signature: Date:

Distribution:

File reference(s)
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.

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.
1.3 Diagnosis Descriptions

Some uncommon diagnoses now have a plain English description that will be printed in the CR1(PCA-1BR)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).

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

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

<table>
<thead>
<tr>
<th>A (Frequency)</th>
<th>C = a few C = several C = many</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frequency</td>
<td>C = a few C = several C = many</td>
</tr>
</tbody>
</table>

B: Duration

<table>
<thead>
<tr>
<th>C = less than 6 months C = 6 months or more</th>
</tr>
</thead>
</table>

C: Paid/Paid

<table>
<thead>
<tr>
<th>C = Paid C = Paid, but not working</th>
</tr>
</thead>
</table>

Occupation and Tasks

<table>
<thead>
<tr>
<th>Task 1</th>
<th>Task 2</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Task 3</th>
<th>Task 4</th>
</tr>
</thead>
</table>

Hours Worked

<table>
<thead>
<tr>
<th>Hours Worked</th>
<th>10</th>
</tr>
</thead>
</table>

Reason for Leaving

<table>
<thead>
<tr>
<th>Reason for Leaving</th>
<th>Reason for Leaving</th>
</tr>
</thead>
</table>

A: Health or Health Issues

<table>
<thead>
<tr>
<th>C = mental health / stress / work related stress / anxiety</th>
</tr>
</thead>
<tbody>
<tr>
<td>C = depression / alcohol problem / drug problem</td>
</tr>
</tbody>
</table>

B: Other Reasons

<table>
<thead>
<tr>
<th>C = redundancy / poor performance / life style / family / pregnancy</th>
</tr>
</thead>
<tbody>
<tr>
<td>C = housing / work / other reasons / poor health / poor speech</td>
</tr>
<tr>
<td>C = unknown / other issues / illness / physical health</td>
</tr>
</tbody>
</table>

C: Not applicable

Add
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(PCA-IBR)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(PCA-IBR)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

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

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 document/s have been studied. Type the names of any other document into the free text area labelled 'Others: (please specify)'.

Training and Development Unit
IB Pathways - LiMA V3 Technical Manual
Reference MED-IBPW-001(e)
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.
Medical Services

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.

Name of sender:          Date:

Location and telephone number:

Please return this form to: Angie Rhodes
Training and Development Co-ordinator
Alos Origin
3300 Solihull Parkway
Birmingham Business Park
Birmingham
B37 7YQ