

# Fitness-for-Work Testing Best Practice

Presented by: SureHire Occupational Testing Services



Experts in Occupational Testing

## **Fitness-for-Work Testing**

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## Who is working for you?

The dating scene, like hiring, is one filled with infinite unknowns. Until you invest time with a new prospect, you cannot know whether a person will be a short-term relationship or potential life partner. In the initial phase, you get to know his or her history and habits. If you are at risk of disliking their spending, eating, or work habits, a break-up might make the most sense.

Similarly, when a worker steps onto your work site, you know nothing about him or her. The difference: it is much more difficult to break up once a candidate is hired. The moment you hire, legally, the candidate is your responsibility.

If previous or current injuries, medical conditions and/or physical limitations prevent an employee from safely performing the physical demands of their job, simply terminating their employment becomes a human rights infringement.

In the last ten years, occupational testing, and more specifically, Fit-for-Duty testing, has been adopted as a best practice in certain industries, including drilling of oil and gas wells, giving companies a competitive advantage in upholding safety records, reducing incidents and WCB claims, maximizing productivity, and making them the employer of choice.

Fit-for-Duty is not a testing process to tell an employer who they should turn away; instead it empowers employers to make an educated decision based on a worker's medical & physical capabilities and limitations.

## What is a Fit-for-Duty test?

A Fit-for-Duty test is a series of medical assessments and physical testing stations designed to match a candidate's musculoskeletal abilities with the physical demands of the job they are applying for. Fit-for-Duty testing gives an employer a recommendation to hire and, if applicable, provides them with a comprehensive report of a candidate's medical and/or physical limitations, along with potential workplace restrictions and/or accommodations based on the job's PDA.

A Fit-for-Duty test attempts to place each candidate in the job best-suited to their abilities to promote a safe and productive work environment for themselves and others working with them.

**Worker's Compensation Board (WCB) reported 1,307 lost-time claims in Alberta's drilling industry in 2006, costing the industry over \$3.8M. (WCB Industry Synopsis, Drilling and Gas Wells, pg. 2)**

In 2005, many Canadian drilling companies adopted a standardized, industry-wide Fit-for-Duty pre-employment testing protocol, leading to a decreased number of lost-time claims.

**In 2011, the cost of claims to Alberta's drilling industry had decreased 78%, to \$420,000. (WCB Industry Synopsis, Drilling of Oil and Gas Wells pg. 2)**

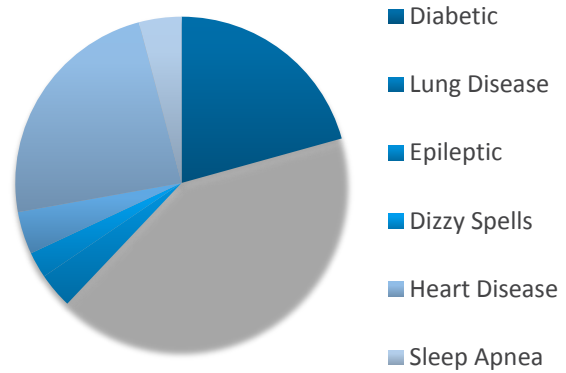
## Why should I do Fit-for-Duty testing?

In 2012, a study completed by SureHire Occupational Testing, analyzed the medical and physical testing data of 2000 trade workers from 2010-2012 who participated in pre-employment Fit-for-Duty testing. The results below represent the average trade worker presently working in an industrial setting in Canada.

- **2000 trade workers tested between July 24, 2009 and March 13, 2012** participated in a SureHire Fit-for-Duty testing protocol
  - Musculoskeletal/Medical Pass Rate: **92.4% (1848)**
  - Critical Strength & Mobility Testing Pass Rate: **92.8% (1856)**
  - Musculoskeletal/Medical Stoppage Rate: **7.6% (152)**
  - Critical Strength & Mobility Testing Stoppage Rate: **7.2% (144)**
  
- **Of the 152 Musculoskeletal/Medical Stoppages:**
  - **4% (80)** of the **7.6% (144)** received written clearance from a physician for Blood Pressure
  - **2.9% (58)** had other documents reviewed and were permitted to continue with the Critical Strength & Mobility testing
  - The **2.9% (58)** consisted of the workers requiring clearance after reviewing diagnostic imaging, completion of a rehab program and review of medical professional discharge report
  - **0.7% (14)** were unable to continue with the physical testing
  
- **Of the 144 Critical Strength & Mobility Stoppages:**
  - **0.5% (10)** were unable to safely complete a three minute stepping exercise
  - **4.0% (80)** were stopped during one of the five lifting stations
  - **2.7% (54)** were stopped on the low back endurance test
  
- **Age & Gender:**
  - **Average Age:** **41.3 years**
  - **Male:** **92.7% (1854)**
  - **Female:** **7.3% (146)**
  
- **Average Weight:** **201 lbs**
  - **Maximum Weight:** **418 lbs**
  - **Minimum Weight:** **98 lbs**
  - **300 lbs+:** **1.65% (33) weighed 300 lbs or greater**
  
- **Pulse Oximetry (O2 Saturation)**
  - **2.1% (42)** scored an O2 reading of 90-93% at rest
  - **0.3% (6)** scored an O2 reading of 89 or lower at rest

- **Acute (current) Injuries**
  - **8.2% (164)** presented with current unresolved musculoskeletal injuries
  - Of which, **5.0% (100)** workers did not fully disclose these injuries but were identified during the musculoskeletal test or during the physical testing

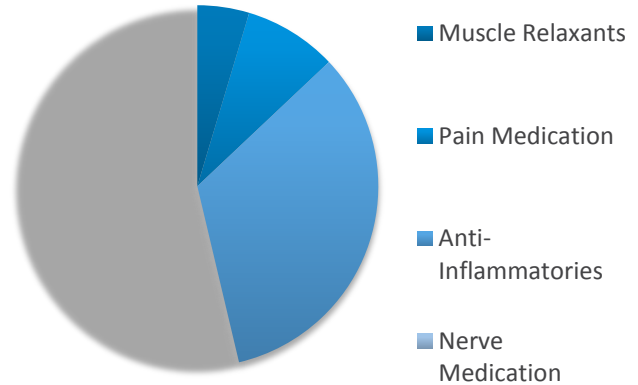
- **Medical Conditions**
  - **3.25% (65)** disclosed as being diabetic
  - **6.5% (130)** disclosed as having current lung issues (e.g. COPD, asthma, emphysema)
  - **0.54% (9)** disclosed being epileptic
  - **0.4% (8)** disclosed having fainting/dizzy spells
  - **0.65% (13)** disclosed current sleep apnea
  - **3.72% (75)** disclosed previous heart surgery, heart disease, stroke



- **Worker’s Compensation Claims**
  - **18.4% (368)** disclosed previous WCB claims
  - Of the **16.3% (60)** that were reviewed, **86.7% (52)** were confirmed closed, **13.3% (8)** were still open
- **Scheduled Musculoskeletal Surgeries**
  - **0.85% (17)** are scheduled for an upcoming musculoskeletal surgery in the upcoming 12 months
- **Low Back**
  - **3.17% (63)** disclosed chronic low back pain
  - **0.52% (10)** were identified through assessment with low back pain
- **Repetitive Strain Injuries**
  - **1.66% (33)** disclosed current or previous repetitive strain injuries
  - **0.78% (16)** were identified through assessment with current repetitive strain injury
- **Blood Pressure:**
  - **10% (200)** disclosed high blood pressure (140/90 or higher)
  - **50% (1000)** were classified as high blood pressure of which **6.5% (130)** were stopped and requested to secure written medical clearance from a physician (meaning after three attempts the lowest reading was 160/100)

• **Medications**

- **53.70%** nerve medication
- **4.63%** muscle relaxants
- **8.33%** pain medications
- **33.33%** anti-inflammatories



A valuable Fit-for-Duty test informs an employer about a candidate’s physical capabilities and limitations to be able to reduce work site incidents and WCB claims, and optimize productivity. Fit-for-Duty is not a candidate elimination process, but, rather, a screening that enables employers to place the right candidate in the right job.

For example, an employee with a torn rotator cuff would receive a work site recommendation that may include restricted prolonged overhead work. If they have a torn knee meniscus, another worker can be assigned to the duties that require scaling scaffolding or repeated use of stairs.

By identifying musculoskeletal injuries, medical conditions, and critical strength and physical capabilities, employers can:

**1. Decrease safety incidents and WCB claims on your work site.**

Creating a safe working environment is an ongoing vision for all upstream oil and gas industries.

Over the last five years, the lost-time claim rate for drilling of oil and gas wells decreased by 33.5%-- Employment Alberta

**2. Increase employee retention.**

If the well-being of already existing employees is compromised by someone unqualified or injured joining the team, you take the risk of losing the employees you are already have. Also, safety incidences on site lower team morale.

A major Canadian drilling company reported that after implementing a Fit-for-Duty testing protocol, their 90 day retention rate increased 17% in one year. --SureHire

### **3. Optimize productivity.**

Work in the upstream oil and gas sector is rewarding, as well as challenging and dangerous. In Alberta's upstream and oil and gas industries, the average number of days lost per lost-time claim in 2010 was 35, compared to an average 23 days per claim for all other sectors in the province (Employment Alberta).

Costs incurred in a lost-time claim are numerous and on the rise. When a safety incident occurs, employers deal with lost work hours, costs to find and train new hires, and, in some cases, replace equipment. In Alberta, in 2006, the average claim cost to an employer was \$5500. By 2011, that average cost increased by 68%, \$8,100 (Employment Alberta).

Fit-for-Duty testing is not only an informed way to put the right candidates in the right job from day one, but, ultimately, gives employers a competitive advantage to optimize productivity and help bottom line.

### **4. Place people in a job where they can succeed.**

You would not ask a first-year apprentice to do an advanced journeyman's task. Similarly, you would not expect someone with a back injury to lift 50 pounds. A Physical Demands Analysis, or PDA, positions employees for successful performance.

In 2010, 44.5% of lost-time claims were from workers under the age of 35 years. This same group also accounted for over half of the disabling injury claims. --*Employment Alberta*

It might be assumed that the younger population is more fit, and less likely to sustain injuries; however, even placing a younger worker in the wrong position leads to lost-time claims and lost productivity.

### **5. Independent third party recommendation.**

Recommendations resulting from Fit-for-Duty testing take pressure off superintendents and project supervisors to enforce candidate activity limitations on site, as restriction/accommodation recommendations have been determined by third-party medical professionals.

### **6. Become a contractor of choice.**

Setting the stage for a safe and productive work site starts with hiring people who are capable of fulfilling their duties safely, without endangering themselves or others. A contractor's safety record can steer clients away if it is not reputable. Contractors who make Fit-for-Duty testing a best practice offer a competitive advantage when bidding on work because they have reduced safety incidences, higher productivity, and find the best of the best employees to complete their projects.

## Attributes of a valuable Fit-for-Duty test

“In most sub-sectors of the oil and gas industry, including upstream oil and gas, oilfield maintenance and construction, and drilling of oil and gas wells, lost-time claim rates decreased between 2006 and 2010.”--  
**Employment Alberta**

### □ **A Physiotherapist’s musculoskeletal assessment is best fit**

Physiotherapists are movement specialists, trained to perform assessments of muscles, bones, joints, ligaments, and tendons (soft tissue). A physiotherapist’s skill set is best-suited to assess a worker’s musculoskeletal condition based on a PDA before they start working on your job site.

### □ **Comprehensive critical strength and mobility testing is required for accurate results**

Traditional Fit-for-Duty testing typically consists of push-ups and sit-ups to determine a candidate’s readiness to work; however, these tests do not accurately reflect or reproduce job site requirements. Standardized job-specific lifts, carries, and movements provide a valid basis for physical testing.

### □ **Testing criteria is based on a job’s Physical Demands Analysis (PDA)**

A Physical Demands Analysis, or PDA, determines standardized job-specific duties. Before testing begins, the critical strength and mobility requirements for each type of job on site are determined, assessed by a physiotherapist or kinesiologist, and applied accordingly in Fit-for-Duty testing.

### □ **Testing protocol follows a national standard**

Recruiting workers often spans a large geographic region. A Fit-for-Duty testing program should use standardized training and testing equipment and protocols across a testing network to meet human rights requirements.

### □ **Results are processed in a centralized location**

When workers are tested across a geographic region, results reviewed by a team in a central location eliminates biases and ensures inter-tester reliability is high. A team of assessors with an in-depth understanding of PDAs, musculoskeletal assessments, and medical conditions ensures Fit-for-Duty testing results will meet job requirements.

### □ **Hiring recommendations are determined by evidence-based practice**

The use of surgical timelines, stages of tissue healing, and medical conditions to determine fitness for duty should be based on peer-reviewed, evidence-based practice. That is to say, Fit-for-Duty results and accompanying recommendations are not the opinion of an independent medical professional, but based on research gathered through data collection and past cases. This ensures standardization of Fit-for-Duty outcomes, and eliminates inter-tester biases and differing levels of knowledge and experience.



□ **Level 1-5 results grading system identifies candidate capabilities**

Fit-for-Duty testing is not a simple yes or no result. Based on the physical demands of a job, a candidate may be able to safely and productively complete certain components of the position. A Fit-for-Duty testing protocol identifies medical and/or physical limitations of a candidate, providing an employer with a recommended level at which the candidate can work safely and accommodation options based on the testing results and the PDA.

□ **Additional/Follow-up testing recommendations are provided for each candidate**

A Fit-for-Duty program that does not assign a full pass should inform a candidate of reason(s) for their grading level, and what steps to take to change the original assessment results. The Fit-for-Duty protocol should have systems in place to ensure 100% of candidates are informed of why restrictions were placed on them, and what course of action they can take to remove those conditions (if any).

## **Making Fit-for-Duty a best practice**

A proactive approach to hiring and accommodating a candidate's physical capabilities and/or limitations wins companies decreased safety incidents and maintains a healthy productive team and work site morale, where everyone is committed to creating a safe working environment.

Fit-for-Duty testing is one way of ensuring that the right people are on your work site from day one.

### **Steps to make Fit-for-Duty testing a best practice for your company are:**

- ☑ Complete a Physical Demands Analysis (PDA) for each position on your work site
- ☑ Find a Fit-for-Duty company who can meet your needs
- ☑ Inform your work force Fit-for-Duty testing will not affect their current position
- ☑ Update your hiring package to reflect your employment offering is based on the results of a Fit-for-Duty test, Drug and Alcohol test, etc.
- ☑ Secure information sessions with your Fit-for-Duty company to present to the rest of your team to explain the human rights aspect, how results are interpreted, etc.
- ☑ Implement your best practice

## Frequently Asked Questions

### **1. After implementing a Fit-for-Duty testing program, am I able to test my current employees?**

Fit-for-Duty testing is primarily meant for potential job candidates as an employer is attempting to ascertain whether that candidate will be successful in the job that they are applying for. However, if an existing employee quits their job and returns at a later date (e.g. layoff due to seasonal work), an employer is able to have them complete the Fit-for-Duty test upon their return. Additionally, if a current employee desires to move to a different role within the company that has physical demands that are different from their current role, the employer can have them complete the Fit-for-Duty test to determine their match to the new position. If they are not successful moving into the new role, the employer must ensure that the worker is able to return to their current/previous position.

### **2. If I test a candidate at a specific PDA level, am I able to transfer them to different job positions?**

A worker who has successfully completed a Fit-for-Duty test is able to transfer to other jobs within a company as long as the physical job demands of the new position are equal to or less intense than the current position. If the new position contains job demands that are greater than the current position, it is recommended that the worker complete a new Fit-for-Duty test.

### **3. Am I obligated to hire applicants that have limitations/restrictions based on the PDA of the job they applied for?**

No, if there is no ability to accommodate the job duties so that the worker can safely complete the key job tasks without causing undue hardship to the company, then the company is not obligated to offer employment to the candidate.

As an example, if an electrician has a partial thickness tear of his/her rotator cuff, the accommodation would restrict overhead work. If the job position required prolonged overhead work and the environment could not be altered to accommodate the candidate's physical limitations, another candidate would be recommended to fill that position.

### **4. What is the average length of time to complete a Fit-for-Duty test?**

Sixty minutes is the average length of time to complete a comprehensive Fit-for-Duty test. A full body musculoskeletal evaluation ranges anywhere from 20-30 minutes and the critical strength and mobility testing lasts 30 minutes. This can be extended if the candidate has high blood pressure, a laundry list of pre-existing injuries that need to be assessed and cleared by the physiotherapist, or a medical condition that needs to be discussed with a physician.

**5. What is the Fit-for-Duty testing company able to provide to the employer in terms of the disclosed applicant information?**

Information disclosed by a candidate during the Fit-for-Duty testing is available to the employer to be used in the hiring process. The safeguarding of the information is the responsibility of the employer and their Fit-for-Duty testing company, similar to life insurance company protocol.

**6. What information is available to the employer if a tested applicant sustains an injury/incident?**

If a candidate completes a Fit-for-Duty test and sustains an injury once they commence work for that employer, the employer has the ability to request the original paperwork from their Fit-for-Duty testing company. The paperwork can be used to determine if the current injury is based on a pre-existing condition and a request for cost relief from WCB is an available option for the employer.

**7. What are the critical strength weight levels based on?**

The weights that a candidate lifts during a Fit-for-Duty test are based on a job's Physical Demands Analysis (PDA) that has been completed by a certified assessor. A candidate cannot be asked to lift weights more than what the job demands, and it is not valid to lift weights that are less than what is required.

The weights used in a Fit-for-Duty test need to confirm that the candidate has the necessary strength and conditioning to safely work in a job with that specific weight expectation.

**8. Where in the hiring process does Fit-for-Duty occur?**

In a typical pre-hire testing protocol, the Fit-for-Duty testing follows the successful completion of the drug and alcohol test, and before the baseline audiometric test. Often if the candidate is not successful with the drug and/or alcohol test the Fit-for-Duty test is not completed.

**9. What is a Physical Demands Analysis (PDA), and how is it completed?**

A Physical Demands Analysis is a systematic procedure to quantify and evaluate all of the physical demands and environmental components of essential and non-essential tasks of a job. PDA is a process of establishing what a job is. A PDA is the "cornerstone" of the analytical process used to determine compatibility of a candidate to do a specific job.

A PDA is a process of breaking up a job in order to examine its individual tasks. When conducting a Physical Demands Analysis, investigators will objectively quantify and evaluate the environmental conditions, use of machines, equipment, tools, work aids, and physical demands of each task. To quantify the physical and environmental demands of the job, direct and indirect observation techniques are utilized.

## Resources

Occupational Injuries and Diseases in Alberta. Employment Alberta. Retrieved from <http://employment.alberta.ca/documents/OID-upstream-oil-and-gas.pdf>, March 2012

WCB Provincial Synopsis, Alberta--All Industries and All Accounts. WCB Injury Stats 2006-2011. Page 1-8.

WCB Industry Synopsis, Drilling of Oil & Gas Wells. WCB Injury Costs Drilling 2006-2011. Page 1-8.

### For Further Information Please Contact:

Kyle Powell, President  
SureHire Occupational Health Testing

TF: 1.866.944.HIRE (4473)  
C: 780.975.1192  
E: [kyle.powell@surehire.ca](mailto:kyle.powell@surehire.ca)  
W: [www.surehire.ca](http://www.surehire.ca)

	SureHire Fit-for-Duty Protocol	Standard Health Assessment
<b>MEDICAL/MUSCULOSKELETAL</b>		
Ability to assess the musculoskeletal (MSK) integrity of Candidate	YES	NO
Able to identify pre-existing MSK injuries without Candidate disclosure	YES	NO
Ability to identify recurring/degenerative MSK injuries	YES	NO
Candidate performs self-reporting medical questionnaire	YES	YES
Height, weight, blood pressure measurements	YES	YES
Objective grip strength measurement	YES	NO
Assessment of general health	YES	YES
Ability to recommend specific re-test criteria - not just "doctor's clearance"	YES	NO
Uses the Krause Webber Back Questionnaire to assess low back health *(developed in the 1950s for children with Spina Bifida)	NO	YES
Pulse Oximetry/Oxygen Saturation Reading	YES	NO

<b>CRITICAL STRENGTH &amp; MOBILITY (PHYSICAL TESTING)</b>		
Lifting based on physical demands of the job Candidate is applying for	YES	NO
Use of heart rate monitors & O2 saturation monitors during the lifting for cardiovascular safety	YES	NO
4 years post-secondary education of biomechanics & ergonomic assessments (eg. Physio, Kinesiologist, Ex. Therapist)	YES	NO
Perform push-ups and sit-ups to assess critical strength	NO	YES
Standardized lifting boxes, lifting tables, stairs across Canada	YES	NO
Medical/Physical Stoppage Rate	10-12%	<1%