Health Surveillance Data at Your Fingertips

Medgate's advanced Occupational Health Software Suite will enable you to track medical trends, manage compliance and regulatory requirements, mitigate absences, and make informed decisions on how to improve employee health and productivity.

Developed by occupational health nurses, case managers, risk management experts, and physicians, Medgate's integrated Occupational Health Management software offers the most intuitive and comprehensive functionality on the market. With over 25 years of experience and a client roster of fortune and global 500 companies and high-profile government organizations, Medgate is proud to lead the way in OH&S data management.

Key Benefits of the Occupational Health Software Suite

With Medgate's Occupational Health Software Suite, you will:

- **Standardize employee health data management** across multiple sites or countries
- Implement and/or streamline **electronic medical record keeping**, supporting accuracy and compliance of the medical record
- **Measure and trend clinic utilization and employee health** with robust reporting capabilities
- Easily visualize key indicators and priority activities with a **personalized medical dashboard**
- **Increase clinic productivity** with valuable features such as auto e-mail notifications, business rules, predictive text, interfaces with medical testing equipment, and more
- Gain one-stop access to an employee's complete medical history via the Medical Chart module
- Manage medical surveillance with an advanced scheduler that allows you to create the surveillance activity, set up exposure groups, and automatically notify the employee(s) being recalled as many time as required
- Integrate medical, case management and safety data to eliminate redundant data entry, improve communications, and ensure data accuracy when an employee is sick, injured or absent
- **Mitigate absences and claims** and be able to demonstrate return-on-investment from your case management programs
- **Network with an esteemed group of occupational health professionals** via Medgate's client community portal, user group conferences, and other educational activities
- **Take advantage of endless configuration** options to tailor the system to fit your unique business requirements

Medgate's occupational health modules provide the occupational health practitioner with a complete and invaluable toolset to manage all clinic activities. Click on one of the modules below to learn more:

Occupational Health Software Suite Modules

Audiometric Testing

This comprehensive module enables occupational health professionals to track employee audiometric testing details and results through manual data entry or via direct interface with audiometers. Noise exposure history can be viewed for those employees who have had personal noise dosimeter monitoring. Hearing classification is recorded based on the various jurisdictional requirements.

Key Benefits of the Audiometric Testing Module

The Audiometric Testing Module will enable occupational health professionals to:

- Automatically capture all of the details of audiometric tests through direct interface with audiometers
- Track employees enrolled in a hearing conservation program or exposure group and ensure employee participation in required testing with automatic reminders and notifications
- Comply with federal and provincial requirements for audiometric testing by recording test information specific to your jurisdiction/corporate tracking requirements (i.e.: OSHA, UK/HSE, Alberta, Quebec)
- Capture baselines for each ear to automatically identify standard threshold shifts (STS) and OSHA recordable shifts (ORS); automatic workflows ensure that STS/ORS are confirmed as appropriate
- Graph employee test results with one click
- Easily run reports to view the employee's complete audiometric testing history
- Efficiently create and print /email results, referral letters, claims management letters, etc. using pre-defined templates you create

Key Components

This module includes many invaluable features that will help you quickly and effectively realize the benefits described above. The features fall into five groups:

Capturing Hearing Test Details and Results

- Capture details and results of audiometric tests either through manual data entry or via direct interface with audiometers (see list below)
- Ensure accurate and efficient data entry; direct audiometer interface allows for automatic population of test details such as employee information, test administrator, equipment used, CAOHC, and left and right ear results for each frequency tested
- Adjustments for age (presbycusis) are automatically calculated as are shifts from the first and most recent baselines and percent binaural impairment
- Monitor employee compliance with hearing conservation program requirements using automated workflows and automatic email notifications to remind employees when they are due for their next audiometric test. This involves seamless integration with the Medical Surveillance Recalls module
- Print or e-mail batch recall letters directly through the system
- Record noise exposure history, including date of last noise assessment and decibel level the employee is exposed to (this information can be populated automatically from the Industrial Hygiene Monitoring Module), hearing protection worn, and effective exposure based on calculating the exposed decibel level and NRR rating of the hearing protection.
- Set a baseline for employees to enable automatic calculation of STS/ORS; the employee's first audiogram will automatically be flagged as baseline
- Trigger an automated workflow when an STS/ORS is identified:

  - Prompts will guide the user through questions regarding revising the baseline and confirming the test
  - Once a test is confirmed, it will be automatically flagged as work-related if the employee is enrolled in a hearing conservation program
  - The test can be automatically added to the OSHA log if it is flagged as work-related and the OSHA hearing regulation is being used

- Capture otoscopic exam details
- Calculate hearing classification details based on the regulation identified by user
- Ensure data integrity through automatic creation of a transfer log for all imported hearing results that can be edited and reprocessed (in cases where transfer errors have occurred)

Regulations

- Identify the regulation (i.e. OSHA , UK, Alberta, Quebec) to use for calculation of hearing classifications and system prompts
- Your data entry form will be different depending on what regulation you have identified/selected
- Identify 10db age-corrected shifts with a non age-corrected average of 25 in the 2000, 3000, and 4000 frequencies for OSHA record keeping
- Easily produce system-generated letters outlining results of the audiometric test for referrals, workers' compensation, and claims management

Audiometric Testing Reports

- Run Medgate Standard Reports including averages and shifts for each ear, employee's test history in numeric and graphic formats, and flags for results exceeding jurisdictional regulations
- Send or print employee results including graphic representation of their hearing results

Integration Points

Medgate's Audiometric Testing module integrates with the following:

Occupational Health Software Suite:

- Clinic Visits
- Medical Surveillance Recalls
- Scheduling

Industrial Hygiene Software Suite:

- Monitoring

Body Fluid Exposure

The Body Fluid Exposure (BFE) Module provides organizations with a comprehensive and robust tool to track, record, and manage all staff exposures to splashes / sharps / needlesticks.

Key Benefits of the Body Fluid Exposure Module

This module enables occupational health departments to:

- Integrate with the Clinic Visit, Case Management and Incident Management modules for effective communication and seamless data sharing between departments/functions for occupational body fluid exposures
- Automatically populate the OSHA 300 log as a "privacy case", the OSHA Sharps log and accompanying OSHA 301 with the BFE details
- Demonstrate appropriate due diligence by tracking exposure protocols followed for each exposure / conversion
- Configure your BFE data capture form to company specific workflows and processes based on the type of exposure (sharp/needlestick, splash or aerosol transmissible diseases (ATDs))
- Record clinical testing and immunizations administered to the source and the exposed employee

Key Components

The features of this module fall into three groups:

Tracking and Managing Body Fluid Exposures

- Capture details on how the body fluid exposure occurred and share this data with the case manager/ incident investigator as appropriate; details include date, location, description, and cause of the incident
- Record the element the body fluid was exposed to from a company-tailored list of potential exposures; volume and severity of the exposure are also captured
- Assess and note the risk level of the exposure

- Track information specific to the type of exposure – for example, in the event of a syringe exposure, you might track whether it was safety engineered, whether the safety mechanism was activated, whether it was contaminated, etc.
- Ensure that the source individual (if known) is tracked on the record
- Record whether the exposed employee converted (contracted the disease/illness and/or tested positive for the disease i.e. tuberculosis)
- Document any exposure protocols followed and immunizations administered:
- Link the appropriate protocol to the exposure record including start and end dates
- Track immunization and clinical testing for the exposed person (via direct links to the Clinical Testing and Immunization Modules); if immunization tests are selected, automatic workflow will ensure that employees are recalled for subsequent doses
- Track any testing administered to the source
- Reference any medications, allergies, and contraindications for the exposed employee
- Create and track any corrective actions associated with the BFE (see the Findings & Actions Module)
- Access, create, and/or attach any questionnaires, notes and documents associated with the BFE

Body Fluid Exposure Reports

- Report on any data captured in this module using Medgate's flexible Report Writer tool
- Analyze exposure counts by department/geographic location, risk level, part of body, or other BFE dimensions using the powerful Metrics tool

Integration Points

The Body Fluid Exposure Module integrates with the following modules in the Medgate System:

Occupational Health Software Suite:
- Clinic Visit
- Case Management
- Clinical Testing
- Immunization
- Medical Chart

Safety Software Suite:
- Incident Management

Case Management

The robust and powerful disability Case Management Module provides an occupational health manager with a complete system for the management of occupational and non-occupational (disability) cases. This module provides extensive absence management capabilities, allowing case managers to coordinate care in the most efficient and cost effective methods possible and foster a timely and healthy return to work.

Key Benefits of the Case Management Module

This module will enable occupational health management professionals to:

- Track all types of occupational and non-occupational claims, including, but not limited to, workers' compensation, STD, LTD and FMLA (US)
- Record and track an employee's progress related to occupational and non-occupational injuries including their absences, work restrictions and expected return date
- Respond to regulatory and corporate body inquiries on the spot by having case details available at your fingertips
- Streamline regulatory compliance with auto-population of forms based on the case data you've collected and tracked in the system
- Integrate with the Clinic Visit and Incident Management modules to enhance communication, ensure record accuracy, and reduce redundant data entry with auto-population of shared data (as permitted by your security settings)
- Directly access integrated disability duration guidelines and treatment guidelines for each specific diagnosis to reference evidence-based absence benchmarks and other important information regarding the relevant medical condition
- Demonstrate tangible return on investment (ROI) from your case management efforts with comprehensive and easy-to-run reports
- Create and configure a personalized and interactive to-do list and case management dashboard that will enable you to effectively organize and prioritize your activities

Key Components

Tracking Cases

- Integrate with the Clinic Visit, Incident Management or Body Fluid Exposure modules for auto-population of pertinent case details (employee information, date/time of injury, chief compliant, injury/illness details)
- Record whether the case is occupational or not; occupational cases can be shared with safety and the Incident Management Module
- Easily generate workers' comp. and other regulatory forms that are auto-populated with pertinent data
- Capture detailed case information including but not limited to:
    - Employee information and the onset date of the illness or injury
    - Assigned case manager and third-party adjusters, where applicable
    - The date the case was initially opened and the date the employee was first contacted
    - User-definable case types (STD, LTD, WCB, etc.) and case status (Pending, Open, Closed, etc.)
    - Unlimited medical conditions including start and end date
    - Provider that determined the diagnosis
    - Extensive case notes
    - Tracking for FMLA and ADA purposes
    - Insurance claim details
- Determine work hours lost through automatic system-generated calculations
- Schedule recall appointments with automatic notifications sent to employees, using the Scheduling Module
- Record OSHA details (U.S. customers):
    - OSHA Logic feature automatically marks the case as OSHA recordable based on the nature of injury, medication, procedures, restrictions, absences, employee death or loss of consciousness; or, you can manually flag the case as OSHA recordable
    - Date the case become recordable is auto-populated from historical data
- Record work restrictions and track all work restrictions, including those captured in other Medgate system modules (i.e.: Clinic Visit, Medical Chart, etc.)
- Reference and track additional details in the case record for efficiency:
    - The employee's diagnoses and case-related procedures
    - The employee's absences (see below)
    - To-do items and activities related to the case
    - Case-related questionnaires (integrates with the Questionnaire Module)
    - Case-related findings & actions
    - Letters and documents (see below)

- Efficiently generate and send a host of case letters (i.e.: STD acceptance/denial, LTD acceptance/denial, other benefit notifications) using pre-defined templates
- Attach any related documents to the case record (i.e.: physician correspondence, physical therapy progress notes, return to work notes, MRI or other test results)

Tracking Absences

- View an absence summary that tracks days taken and days remaining for STD, State & Federal FMLA, or other benefit programs
- Record continuous absences for the employee:
    - Details tracked include absence status, reason, start date, and percent full duty (to indicate that the employee worked part of the time on restricted duty)
    - Add multiple restrictions to the record in a single step for a restricted work days (RWD) absence
- Indicate whether the absence should count against STD, FMLA, or State FMLA totals
- The Medgate system regularly calculates lost time and restricted time, giving you the most current absence information
- Record intermittent absences for the employee:
    - Details tracked include start date, hours per day, whether it is an STD or FMLA related absence, and any notes pertaining to the absence
    - Automatically link to the Medical Chart Module to display all of the employee's absences on the electronic medical record

Disability Guidelines (ODG/MD)

- Access the Official Disability Guidelines® (ODG) from the Work Loss Data Institute or the Reed Group® MD Guidelines directly from within the case management module to reference:
    - Recommendations for minimum and maximum disability durations by diagnoses
    - Related treatment guidelines
- Compare disability duration guidelines with the personal medical doctor estimate; calculate any early return negotiated by the case manager to provide return on investment (ROI) information related to case management services

To Do List

- Track all of your case-related activities in a comprehensive to-do list, which acts as a tickler list of all outstanding and upcoming actions as well as a chronological history of all activity related to a case
- Record company-defined activity type, activity date / time, time taken to complete, provider, costs (if applicable), case notes, and outcomes
- Sign activities if necessary
- Print a list of all to-do items for a specific practitioner
- Receive automatic e-mail reminders for overdue to-do items

Case Management Reports

- Run comprehensive reports using Medgate's Standard Reports tool, such as:
  - Time lost by employee / case type / provider / department
  - Expected versus actual return to work time showing actual work days saved
  - Reports of case management activities including cost and time data and new, opened and closed case summary/detail
- Use Medgate's Report Writer to run analysis on any additional information captured in the case management module
- Analyze case counts by case manager, category, status type, etc. and /or track company-specific case management measures / targets, etc. using Medgate's dynamic Metrics tool
- Gain one stop access to your important case management reports, to-do list, claims information, case counts, etc. using the Dashboard tool

Integration Points

Below is a list of the modules that integrate with the Case Management module in the Medgate system:

Occupational Health Software Suite:

- Body Fluid Exposure
- Clinic Visit
- Medical Chart
- Scheduling
- Medical Surveillance Recalls

Safety Software Suite:

- Incident Management

Chest X-Ray

The Chest X-Ray Module in Medgate's Occupational Health Software Suite provides relevant OH&S staff with a central access point to monitor and store employee chest x-ray results.

Key Features and Benefits of the Chest X-Ray Module

This module will enable occupational health professionals to:

- Promote effective capture of all details relating to the employee's chest x-ray, including:
    - Date of last x-ray
    - Employee's geographic location and HR data (auto-populated when you select the employee)
    - Test values for small opacities, large opacities, pleural calcification, and pleural thickening
    - Film date, film quality
    - Reader's name
    - Pulmonary Symbol
    - Notes area document text interpretation of the x-ray
- Track B-reader evaluations of chest x-ray results, if necessary
- Access chest x-ray results in the employee's electronic medical record via the Medical Chart Module
- Scan physical chest x-rays and any relating documents into the system
- Flag a chest x-ray to be included on the problem list report
- Quickly view a summary of all chest x-rays using Medgate's Standard Reports tool

Clinic Visit

The Clinic Visit Module is the central point of Medgate's Occupational Health Software Suite. This robust and comprehensive module enables occupational health clinics to function at maximum productivity and effectively and easily manage and track all employee visits.

Key Benefits of the Clinic Visit Module

This module will enable health clinics to:

- Provide a central 'home base' to occupational health practitioners and clinic professionals
- Efficiently manage all activities and information related to employee visits
- Standardize procedures and treatment templates by creating uniform visit reasons that are used across occupational health suite modules
- Connect clinic visits with the Case Management, Incident Management, and Body Fluid Exposure modules to share/access all data for occupational and non-occupational illnesses/injuries from a central point
- Run comprehensive reports to analyze and report on clinic visit data and clinic utilization

Key Components

The features of this module fall into five groups:

Clinic Visit Details

- View a historical list of all past, current, and future clinic visits including status, practitioner, visit reason, chief compliant and case number
- Track health center visits by treatment date and visit reason
- Efficiently create new clinic visit records where the employee's HR and demographic information is auto-populated once an employee is selected for a visit
- Capture additional details, including the health centre, the attending practitioner, the time taken for the visit, priority, vitals, chief compliant and employee statement
- Record discharge details including duty disposition and medical disposition (i.e.: referred to an outside provider)
- Link to the Case Management and Incident Management modules if the visit is flagged as occupational and/or case managed, or if you have selected to share with safety; this allows for efficient bidirectional sharing of data (as permitted by your security settings)
- Record the employee's vital signs and trend vital signs within the Medical Chart
  Manage referrals:
    - Track details, including where/to whom the employee was referred (outside provider, hospital, etc.) and the referral type
    - Print / email a referral form with all of the details regarding the appointment
- Store documents/images associated with the clinic visit in various file formats
- Flag diagnostic information on a Problem List report

- Capture detailed notes relating to the visit:
  - Record note date, note time, and author
  - Enter free text notes or use a pre-defined notes templates (i.e. back pain, repetitive motion, ergonomic) in S.O.A.P. or text format
  - Flag whether the note should be shared with safety, added to the problem list, or marked as private
  - Electronically sign notes and capture the sign date; notes cannot be edited or deleted after they are signed and locked down
  - Define whether employees must immediately lock down notes, allow a delay before locking notes, or whether the system should lock all notes at a specific interval (i.e.: every night)
  - View all notes for related clinic visits and the case (if applicable)
- Record and view procedures (i.e.: cast administered), diagnoses, allergies
- Record prescriptions and generate prescription forms to print or email directly to the pharmacy
- Record multiple injuries/illnesses in addition to the primary nature of injury

Case/Incident Management Data

- Share data with case management and safety to auto-populate any of the details below from the Incident Management or Case Management modules, or to share any data with these modules if the case/incident begins with the employee's clinic visit
- View/capture all case management/incident information, including:
  - Comprehensive case details (same details as tracked in the Case Management Module)
  - Description of the event leading to the injury/illness (root cause analysis details)
  - Treatment information, including treating facility, physician, whether the employee visited the emergency room, etc.
  - Safety classifications
  - OSHA details (if applicable), including whether the case is OSHA recordable, date case became recordable, and whether it should be lined out on the OSHA log
  - Workers' comp. / claim report information including jurisdiction, claim number, and insurance carrier
  - Short term disability (STD) details, including STD start date, days taken, and days remaining FMLA / State FMLA details
  - Auto-populate jurisdictional workers' compensation forms so all you have to do is print and send
  - Automatically populate the OSHA 301 form for any OSHA recordable injuries/illnesses rack all employee absences, shared with case management (see the Case Management Module for more details)

Exam Activities List

- Track any surveillance/exam activities that are required to be completed for the employee from a central access point
- Add additional activities to the list ad-hoc
- Link directly to the module in which the activity needs to be recorded (i.e.: if the employee is required to complete a 'complete blood count (CBC)' test, then you would link to the Clinical Testing Module directly from the exam activities list and record details of the activity)
- View the completion statuses for any/all exam activities related to the employee; status automatically updates once the exam activity has been completed in the related module (i.e.: Audiometric Testing)
- Manage compliance of exam activities by tracking clearance status for any surveillance activity (i.e.: a company may implement a pass/fail threshold for employees who are working in a certain job; this information is recorded here)

Clinic Visit Reports

- Run a host of employee-specific as well as aggregate clinic reports using the Standard Reports tool
- Report on any information captured within the module with Medgate's flexible Report Writer tool
- Use the dynamic Metrics tool to analyze/slice and dice clinic visit counts by various filters, including diagnoses, clinic visit status, employee, and other demographic/geographic dimensions

Integration Points

The Clinic Visit Module integrates with the following modules in the Medgate system:

Occupational Health Software Suite:

- Audiometric Testing
- Body Fluid Exposure
- Case Management
- Chest X-Ray
- Clinic Visit
- Clinical Testing
- Drug Testing

- Immunization
- Medical Chart
- Pulomonary Function Testing
- Scheduling
- Surveillance Recalls
- Travel Clearance
- Vision Testing

Safety Software Suite:

- Incident Management

Training Software Suite (all modules)

Clinic Testing

This module provides occupational health professionals with the ability to create clinical testing batteries, and track and record all employee clinical tests for different sample types. The information recorded in this module also appears in the employee's electronic health record in the Medical Chart Module.

Key Benefits of the Clinic Testing Module

This module will enable occupational health professionals to:

- Define, create, and track an unlimited amount of clinical test batteries / panels
- Track details for each clinical sample, including all of the batteries that should be tested in the sample and results of each test
- Link clinical test batteries to medical surveillance programs
- Record employee clinical tests directly from within the Clinic Visit Module for efficient workflow
- Trend employee clinical test results in the Medical Chart Module
- Easily import laboratory results into the system through direct data transfer
- Report on clinical test results with comprehensive standard reports

Key Components

The components of this module are as follows:

Test Batteries

- Define "test batteries" or panels (i.e. lipid profile) for medical testing and the individual test units (i.e. blood lead, cholesterol, glucose, LDL etc.) that are included in each test battery
- Group test units by category (hematology, urine, drug etc.) and by result format (i.e. y/n, numeric, text, and multiple choice)
- Link each test battery to a health center as appropriate
- Flag whether a test battery is for a body fluid exposure (integrates with the Body Fluid Exposure Module)
- Flag whether a test battery is for drug testing (integrates with the Drug Testing Module)
- Record recall periods for the test battery as necessary to trigger automatic workflow to notify employees when they are due for re-testing

- Integrate with the Medical Surveillance Recalls Module to connect clinical test batteries to medical surveillance programs, which will trigger automatic workflow that recalls employees for required testing
- Track the sequence in which the tests should be performed
- View all results for each test battery in one easy-to-run report

Recording Clinical Test Details and Results

- Track comprehensive sample details including sample type, sample date, specimen ID, test administrator, test reviewer, fasting requirement
- Capture clinical test results manually or through direct transfer from the clinical laboratory using the ASTM-HL7-88, 94Gamma Dyna Care or HL7 2.2 or 2.3 (standard protocols used by most laboratories)
- Enter results for all battery tests on one simple screen for efficient data entry
- Import multiple test results for multiple employees at once if using direct laboratory transfer; results will then be populated for each employee/test/health center as appropriate
- Track and view laboratory reference ranges for test results as well as company normal ranges (as defined by your company)
- Reference the employee's allergies and prescriptions on the sample record for contraindication details
- Track any notes related to the sample
- Identify Biological Exposure Indices (BEI) in the clinical test units for reporting and linkage with the Industrial Hygiene Software Suite
- Trend the employee's clinical test results as an indicator on the electronic medical record in the Medical Chart Module and access clinical testing results directly from within that module

Clinical Testing Reports

- Run various system reports using Medgate's Standard Reports tool, including clinical test history for one or more employees, abnormal test results, and others
- Use Medgate's flexible Report Writer tool to report on additional data captured within the module

Integration Points

Below is a list of the modules that integrate with the Clinical Testing Module in Medgate's Occupational Health Software Suite:

- Body Fluid Exposure
- Clinic Visits
- Drug Testing
- Medical Chart
- Medical Surveillance Recalls
- Scheduling

Drug Testing

The Drug Testing module enables occupational health professionals to run both deliberate (i.e. pre-employ-ment, for cause, post accident) and random drug testing within their organization and fulfill employee drug testing requirements. Alcohol testing can also be tracked.

Key Benefits of the Drug Testing Module

The Drug Testing Module will enable occupational health professionals to:
- Monitor a specific pool of employees based on job title, department, or other HR/geographical data
- Either deliberately select or randomize the selection of employees who are brought in for drug testing (using a system-generated randomization algorithm)
- Note status for collection including employees who refused testing or were excused from testing
- Track individual tests in the drug test battery and the related results for each test
- Run a host of standard reports

Key Components

Drug Draws

- Easily create pool(s) of employees from which the drug draw will be created:
    - Include employees by job title, department, or other HR/geographical data
    - Manually include/exclude employees based on program requirements
- Identify the disposition of the employee after testing i.e. returned to work, sent to rehabilitation, terminated
- Tailor drug pools by selecting the percentage of employees to test for drugs or alcohol, and then select the frequency at which the selection should be randomized (if at all)
- Automate and securely randomize draws (if required):
    - The system will run an algorithm to randomly select the number of employees you require for the draw from the pool
    - Security is built-in to ensure that the user cannot view employees in the draw until after the randomization algorithm is run and saved
- Testing is automatically set up once you select the range of dates for the test(s), and the day(s) of the week you wish to perform testing

- View a list of all employees in the drug testing pool / draw, including those who are also flagged for alcohol testing
- View system-generated calculations of the number of employees you will test per year, the number of draws done to date, the number of remaining tests in the year, expected number of employees per draw
- Send a printed copy of employees selected for testing to supervisors
- Define the battery of tests that you wish to run on a pool of employees, and track the laboratory analyzing the samples and related results
- Track the status of the employee's test; whether samples were collected, the employee was excused (if not able to come in for testing), or the employee refused to participate

Drug Testing

- Track sample date (auto-populated), sample type, specimen ID (chain of custody form number), the administrator, test reviewer, sample reason and pool name (auto-populated)
- On each employee record, view the list of tests that should be administered based on the battery previously selected for the draw
- Easily enter drug/alcohol testing results on one form or import results from one or more employees from a laboratory worksheet (i.e.: HL7 form)
- Track whether the positive results were verified by a physician (i.e.: a certified Medical Review Officer)

Reporting

- Run various system reports using Medgate's Standard Reports tool, including a summary of test results, drug DOT report, and drug pool employee reports

Integration Points

Below is a list of the modules that integrate with the Drug Testing module in Medgate's Occupational Health Software Suite:

- Clinic Visits
- Clinical Testing (for test battery creation)
- Medical Chart/Practitioner Inbox (to view allergy and prescription information)

Equipment

The Equipment Module provides occupational health professionals with the ability to comprehensively manage a wide variety of medical equipment that should be tracked, calibrated, inspected or maintained. Security features ensure that only approved Medgate users have access to the occupational health equipment records.

Key Benefits of the Equipment Module

This module will enable occupational health professionals to:

- Manage any/all medical-related equipment that requires periodic testing, calibration, inspection or maintenance
- Consolidate all OH&S equipment together in one tracking interface, if necessary and appropriate
- Track all historical information regarding equipment inspection, calibration and maintenance
- Streamline the calibration/inspection process with automated workflows
- Document and track any issues and corrective actions pertaining to the equipment

Key Components

Equipment Calibration/Inspection Management

- Track data relating to any/all medical-critical equipment such as audiometers, respiratory fit testing equipment, first responder equipment, ultrasound and EKG devices, etc.
- Leverage automated workflows to manage equipment maintenance and recall requirements:
    - Date of next recurrence is automatically calculated based on the date of last calibration/inspection and the calibration/inspection period you've defined
    - Automatic recall email notifications remind you when a piece of equipment is due for calibration or maintenance
- Maintain integrity of calibration/inspection tracking and history by allowing the technician to only update specific data (i.e.: allow him/her to update the date of last calibration but not the calibration/inspection period)
- Attach any related documents to the equipment record, such as calibration inspection certificates
- Build and attach checklists to the equipment record and configure findings to auto-generate based on checklist responses

Equipment Reporting

- Track calibration and inspection activity and due dates using Medgate's Standard Reports Tool
- Manipulate/graph equipment calibration and inspection data using Medgate's Metrics tool

Integration Points

Other than the Occupational Health Software Suite, the Equipment module is present in Medgate's Ergonomics, Environmental, Industrial Hygiene and Safety Software Suites.

Immunization

The Immunization Module is a complete tool for capturing details regarding immunizations, vaccines, and titers/tests administered to employees.

Key Benefits of the Immunization Module

This module will enable occupational health professionals to:

- Track detailed information regarding any immunization that is administered to employees throughout the organization
- Efficiently create and track immunization campaigns (i.e.: flu shot clinics)
- Integrate with the Inventory Module to manage vaccines by lot number and track expiration dates as well as quantities used/remaining
- Integrate with the Travel Module to track all immunizations administered/declined for travel-related purposes
- Configure immunization recalls and automatically notify employees when they are due for follow-up doses

Key Components

Tracking Immunizations

- Integrate with the Inventory Module to track vaccine lot numbers, associated health center, manufacturer, expiration dates, and quantities

- Define company-specific intervals between doses of the immunization/ test, which enables the system to:
    - Automatically calculate recall dose dates based on the immunization/ test selected and date administered
    - Notify employees when they are next due for the next immunization/ test
- Generate individual or batch recall letters depicting specifics about immunization recalls for one or more employees that can be printed/emailed to employees / supervisors, etc.
- Track the specific vaccine administered (brand / name / description), the dosage amount, the administrator, and the reviewer (if applicable)
- Track immunization route
- Record whether the employee declined the immunization, which will automatically remove them from the recall program and be noted on the travel record, if applicable
- Capture results, (i.e.: negative or positive), associated comments, symptoms
- Reference any allergies, medications or contraindications for the employee directly within the immunization record
- Connect a questionnaire to an employee's immunization record (i.e.: consent questionnaire) through inherent integration with the Questionnaire Module
- Use the Questionnaire Module to send a questionnaire to a batch of employees for efficient capture/completion of required data prior to an immunization campaign
- Capture any consent forms or other questionnaires on the employee's medical record in the Medical Chart Module
- Record any notes relating to the immunization
- Attach any related letters or documents to the immunization record

Immunization Reports

- Run Medgate Standard Reports tool to view details such as immunization history, recall status, and employees who declined immunization
- Use Medgate's Report Writer tool to track any information captured within the module
- Leverage the dynamic Metrics tool to analyse/slice and dice immunization counts based on any filters/dimensions you require (ie: administered by, vaccine, immunization route, etc.)

Integration Points

Below is a list of the modules that integrate with the Immunization module in the Occupational Health Software Suite:

- Clinic Visit
- Inventory
- Medical Chart
- Travel

Industrial Hygiene Software Suite:

- Qualitative Exposure Assessment

Training Software Suite (for education recall activities)

Inventory

The Inventory Module integrates directly with the Immunization Module. This module helps organizations to efficiently manage their vaccine inventory.

Key Features and Benefits of the Inventory Module

This module enables occupational health departments to:

- Track a complete inventory of vaccines by health center; link a vaccine to a health center by lot number for easy identification
- Track initial stock and stock additions; the system will then automatically calculate the quantity in stock using the vaccine doses given as tracked in the Immunization Module
- Define your threshold inventory for each vaccine, which is the quantity at which you wish to be alerted that the vaccine inventory is low; this triggers an immediate visual alert (i.e.: module name is red in the system) to notify you to re-stock
- Record expiration dates for the vaccines, which transfers to the Immunization Module to ensure that staff are not administering expired vaccines
- Add new vaccines to your vaccine inventory on the fly for efficient, fast workflow

Integration Points

Below is a list of the modules that integrate with the Inventory Module in the Occupational Health Software Suite:

- Immunization
- Scheduling

Medical Chart

The Medical Chart Module in Medgate's Occupational Health Software Suite acts as an electronic medical record for tracking and recording employee medical data.

Key Benefits of the Medical Chart Module

This invaluable module will enables occupational health professionals/practitioners to:

- Consolidate all of the information / results from the modules in Medgate's Occupational Health Software Suite into one comprehensive, easy to navigate electronic record
- Access medical history/details for the employee, including:
  - All clinic visits
  - Surveillance activities with related status
  - Diagnoses, medications and allergies
  - Immunizations and travel clearance
  - Medical testing
  - Absences and restrictions
  - Medical classifications
  - All medical notes
- Garner information on all activities completed and planned for an employee
- Track and graph key medical indicators such as blood pressure, weight, cholesterol, etc.
- Review and sign any notes recorded in other Occupational Health Software Suite modules

Patient Overview Module

The Patient Overview module is a patient-centric module that allows healthcare providers to view critical patient information on a single screen. All relevant details, including active medications, test results, diagnoses, and restrictions can be viewed and updated without the need to navigate to different areas of the Medgate application.

Key Benefits of the Patient Overview Module

This module enables occupational health professionals to:

- Cross-check drug interactions in real time, without the use of offline references to ensure optimal drug selection and reduction of medication errors
- Access and print drug profiles and data sheets during the order process, further eliminating the need for offline use of drug handbooks and increasing the amount of information that can be provided to the patient.
- Update patient records and look at medical history, all in a single screen.

- Submit orders and print off prescriptions, with both the doctor's and patient's details populated automatically.
- Use drag and drop functionality to completely control over their individual patient overview page layout, without having to leave the module.

Key Components

Medical Information Displays

- Shows all active medications current prescribed to the patient, including dosage details and the date when the drug was originally prescribed.
- All drug orders are automatically cross-checked with existing medications for interactions and against patient allergies. Colour coded alerts ensure that any interactions are caught before the drugs are ordered.
- Drugs can be selected from a database of thousands, updated monthly, by brand name, generic name, pharmacological class or indication.
- All drugs have complete drug profiles and data sheets to ensure that patient is fully informed of all black box warnings and possible side effects.
- Generate and print off prescriptions with all patient and clinic details automatically completed. Our medication database allows users to select from of hundreds of thousands of different drugs, of varying dosages, types and brands to ensure the best selection is made for each patient.

Patient Demographics Banner

- Displays all patient demographics information including name, age, address, work location and job title.
- Displays photograph of patient to ensure that, at a glance, it can be verified that the correct patient record has been accessed.
- Fully customizable to allow different users to have different levels of access.

Detailed Patient History

- All details of previous clinic visits, test results, immunizations, diagnoses and past medications are viewable from a single screen.
- New information can be added to the patient record without having to navigate to different areas of the Medgate application.

Pulmonary Function Testing Module

The Pulmonary Function Testing Module is used to efficiently track and record all employee pulmonary function tests, with the option to interface directly with spirometers.

Key Benefits of the Pulmonary Function Testing Module

This module will enable occupational health professionals to:

- Interface directly with various spirometers to quickly and efficiently populate details and results of employee pulmonary function tests
- Record clearances for respirator fit tests and automatically transfer clearance status to the Respiratory Fit Testing Module in the Training Software Suite
- Review system generated interpretations (i.e.: normal spirometry, restricted/obstructed, etc.), based on PFT results and the pulmonary standard defined for the system
- Attach questionnaires with employee responses to the PFT record, such as the mandatory OSHA Respirator Medical Evaluation Questionnaire
- Track the employee's smoking history

Key Components

The features of this module fall into four groups:

Recording PFT Details and Results

- Capture employee HR and demographic details, which will be automatically populated once you select an employee for a test or if you are using direct interface with spirometer
- Flag whether the pulmonary test should appear on the problem list
- Track any pertinent symptoms identified during a prior physical assessment (if any)
- Identify the best test(s) if there are multiple tests performed on the same date
- Track which spirometer was used and view date of last calibration (populated from the Equipment Module or manually recorded)

- Record all smoking history details, including tobacco type, frequency and start and stop date (multiple histories can be recorded)
  - Reference the employee's restrictions as captured in the other Occupational Health Software Suite modules
  - Add and track any notes relating to the PFT
  - Capture detailed PFT results, either manually or through direct spirometer interface:
    - FVC
    - FEV1
    - FEV1/FVC%
    - PEF
    - FEF 25-75%
    - FET
    - FVC Variability
    - FEV1 Variability
  - Track predicted values for each of the above, automatically calculated based on your defined standard (i.e.: Crapo, European Respiratory Society, Knudson 1976 or 1983, Morris, or NHANESIII)
  - Automatically calculate interpretation (Normal, Severe, Mild, Moderate Restriction, etc.)
  - Track date of Medical Clearance and record which practitioner signed the record and when

Spirometer Interfaces

- Easy One
- Koko
- OMI
- Puritan Bennett
  - PB100
  - PB700 Renaissance II
- Schiller
  - SP10
- Vitalograph
  - Spirotrac IV
  - Spirotrac V5

PFT Reports

- Quickly run Medgate Standard Reports to obtain various data on pulmonary function testing
- Use Medgate's flexible Report Writer tool to report on any other additional data captured in the module
- Leverage the Metrics tool to efficiently analyze pulmonary function test count by various dimensions, including medical clearances, geographic / demographic criteria, or spirometer

Integration Points

The Pulmonary Function Testing Module integrates with the following modules in the Medgate software system:
Occupational Health Software Suite:

- Clinic Visit
- Equipment

Training Software Suite:

- Respirator Fit Testing

Scheduling

The Scheduling Module is a central hub to manage all clinic activities within Medgate's Occupational Health Software Suite. This dynamic on-line appointment calendar enables organizations to run an efficient occupational health clinic through the automation of clinic scheduling activities.

Key Benefits of the Scheduling Module

This module will enable occupational health clinics to:
- Efficiently manage schedules with daily, weekly, or master views to oversee multiple practitioner schedules at once; this function can also be used to manage exam room and medical equipment schedules
- Grant different schedule access to practitioners and non-practitioners
- Link directly to the relevant clinic activity record from within the schedule, with auto-population of the patient's demographic data
- Connect directly with the Medical Surveillance Recalls module to effectively manage all employee medical and educational surveillance activities
- Allow users to add schedules to their personalized medical dashboard with direct links to the clinic activity
- Run effective scheduling reports

Key Components

The features of this module fall into three groups:

Managing Schedules and Appointments

- Allow each scheduling user to set up their available times, for each health center in which they work; easily change scheduling availability for those practitioners with a rotating schedule
- Define the intervals at which you would like to see the practitioner's availability (i.e.: 30 minutes, 10 minutes, one hour, etc.); you can schedule appointments over multiple intervals
- View the status of the appointment at-a-glance with color-coded attendance statuses (i.e.: failed to show, late, re-scheduled, complete, etc.)
- Easily mitigate double-bookings with visual notification on the schedule (i.e.: the appointment turns red if it there is a conflict)
- Create appointments directly within the practitioner's on-line schedule and select whether you would like to view the schedule by activity or employee name
- Tight integration between modules ensures that activity status is automatically marked as completed if the activity was completed in another module (i.e.: Audiometric Testing Module)
- Gain quick details on the appointment by hovering over the appointment in the schedule to view special notes associated with the appointment
- View all of the past and currently scheduled appointments for an employee, as well as all his/her surveillance activities and exposure group clearances
- Define a recurrence for an appointment; the schedule will automatically be populated with the recurring appointments
- Send e-mail appointment notifications to the employee; the employee can 'accept' and it will be automatically added to their Microsoft Outlook or Lotus Notes calendar
- Access your to-do list on the same screen as your daily schedule for efficient management of upcoming tasks
- Schedule reminders for appointments that will display on your / the practitioner's to-do list

Scheduling Reports

- Run scheduling reports quickly using the Standard Reports tool (i.e.: completed schedule activities, schedule status, etc.)
- Generate notification letters to inform employees / practitioners / supervisors of scheduled activities
- Print your schedule and to-do list in one click from within the module
- Use Medgate's Report Writer tool to track any information captured within the module

Integration Points

The Scheduling Module integrates with the following modules in the Medgate system:

Occupational Health Software Suite:

- Audiometric Testing
- Body Fluid Exposure
- Case Management
- Chest X-Ray
- Clinic Visit
- Clinical Testing
- Drug Testing
- Equipment

- Immunization
- Medical Chart
- Pulmonary Function Testing
- Scheduling
- Medical Surveillance Recalls
- Travel Clearance
- Vision Testing

Training Software Suite (all modules)

Medical Surveillance Recalls

The Medical Surveillance Recalls module, which is tightly integrated with the Scheduling Module, allows organizations to streamline the management of medical surveillance programs with automated workflows, notifications, and processes.

Key Benefits of the Medical Surveillance Recalls Module

This module will enable occupational health professionals to:
- Receive exposure group information from Industrial Hygiene and share data for a harmonious approach to surveillance management
- Efficiently manage all medical surveillance groups through one central access point
- Define and configure medical surveillance groups to meet unique and specific requirements (i.e.: by job description, department, location, demographics, or any combination of criteria etc.)
- Define and manage all medical and/or education activities that should be performed on the surveillance group, with direct links to the relevant module in the Occupational Health Software Suite/Training Software Suite
- Track all active and inactive members of a surveillance group and maintain a surveillance history for employees
- Utilize automatic notifications to recall employees for medical surveillance activities

How does the Medical Surveillance Recalls Module Work?

The features of this module fall into three groups:

Managing Surveillance Groups and Activities

- Define recall groups according to your requirements (i.e. surveillance groups, SEGs/HEGs, or occupational exposure groups / OEGs)
- Set-up surveillance programs based on the employee's age, sex, job, work location, potential exposure etc., or any combination of these demographic fields
- Easily manage employee enrolment in a recall group through the ability to remove/add employees on an ad-hoc basis
- Assign the required medical or education activities to each exposure group and specify the time intervals for their recall
- Manage recall activities for an employee:
  - View the status for all surveillance activities for the employee(i.e.: those that are due now but not scheduled, due now and scheduled, or overdue); the status will be updated once each component is completed in the corresponding module or is marked as completed
  - View the surveillance groups in which the employee is enrolled as well as any exposure groups requiring clearance
  - View the employee's schedule history for completed and upcoming activities and create new scheduling activities directly within the surveillance record, which will then be added to the practitioner / educator's schedule
  - Once a surveillance activity is added to a schedule, the practitioner / educator can link directly to the activity that is required to be completed and the relevant data in the activity record will be automatically populated based on surveillance group definitions and employee demographics
- Ensure employees participate in recall activities through automatic system e-mail notifications sent to employees when their next activity is due (this is based on the completed date of the last activity)
- View a history of all notifications sent to employees via a notifications list that allows you to keep track of the date employees were notified about the recall
- Maintain employees in exposure group recalls even after a termination date has been recorded to handle lifetime exposure monitoring requirements (i.e.: Asbestos monitoring)
- Access the complete surveillance record via the employee's medical chart

Surveillance Recalls Reports

- Run extensive reports quickly using the Standard Reports tool (i.e.: "due now" reports, delinquent reports, etc.)
- Generate batch recall letters to efficiently print/email details to employees/supervisors when recall activities are due
- Use Medgate's Report Writer tool to track any information captured within the module

Integration Points

Below is a list of the modules that integrate with the Surveillance Recalls Module in the Medgate system:

Occupational Health Software Suite:

- Clinic Visit
- Medical Chart
- Scheduling

Industrial Hygiene Software Suite:

- Qualitative Exposure Assessment

Training Software Suite (for education recall activities)

Travel Clearance

The Travel Clearance Module enables occupational health clinics to ensure that employees are medically prepared for travel by managing and tracking required immunizations as well as travel kits.

Key Benefits of Medgate's Travel Clearance Module

This module allows organizations to:

- Define and manage immunization programs for various travel destinations
- Track all immunizations that have been given to an employee who is traveling to the selected destination
- Integrate with the Immunization Module to ensure employees receive all doses of immunizations through automatic workflows and email notifications
- Record employee travel clearances and restrictions; restrictions also appear on the employee's electronic medical record in the Medical Chart Module

Key Components

The features of this module fall into three groups:

Recording Immunizations and Clearances

- Link destinations to travel clearance programs (immunization programs); employees who are selected to travel to a specific destination are automatically added to the corresponding program
- Define all of the recommended protocols for your travel program based on your reference source (i.e.: CDC, WHO) or company requirements
- Within the travel clearance record, capture details such as:
    - Destination the employee is traveling to
    - Initial date and final date of the immunization program
    - Clearance type (i.e.: international, national, rural, etc.), status (cleared, restricted, etc.), and date clearance was given
- View a detailed summary of the pre-defined immunizations for the destination and the status of all immunizations, including:
    - Whether the employee should be given the immunization ('do not give' will be selected if there is an allergy or other contraindication recorded in the system)
    - The date the last dose was given, if applicable
    - The due date of the next dose
- Add additional immunizations for the employee to the immunization program on an ad-hoc basis
- Connect directly to the immunization test record via the immunization summary to manage / track any immunizations relating to the travel
- Automatically track all immunization recalls relating to the travel based on your company-specific recall intervals and automatically notify employees when they are due for the next dose
- Record the travel kit including specific medications and other supplies provided to the employee from a company-defined selection list

Travel Clearance Reports

- Report on travel-specific immunizations using Megate's Standard Reports tool
- Use Medgate's flexible Report Writer tool to report on additional data captured in the module

Integration Points

The Travel Clearance Module integrates with the following modules in the Medgate software system: Occupational Health Software Suite:

- Clinic Visit
- Immunization
- Medical Chart

Vision Testing

The Vision Testing Module provides occupational health professionals with the ability to manage and record all employee vision tests for compliance purposes as well as for pro-active vision monitoring.

Key Benefits of the Vision Testing Module

This module allows organizations to:

- Track all vision testing, both ad-hoc and relating to medical surveillance programs
- Ensure compliance by electronically tracking all fit / unfit results and running reports based on this information
- Record corrected and uncorrected results
- Manage vision tests with test formats specific to Titmus, Keystone (UK), and Keystone (US)
- Create vision occupation groups and define criteria for each group, which allows you to track which results represent a pass, warning, or fail, for example; colored icons beside each result allow you to quickly visualize the employee's test results compared to the criteria
- Record glasses details, including type, contacts, prescription / prescription change
- Track U.S. Department of Transportation color testing as part of the vision test
- Efficiently access vision test results from the employee's electronic medical record in the Medical Chart Module
- Add notes to the vision test record
- Flag any vision test on the problem list

Vision Testing Reports

- Use Medgate's Standard Reports tool to quickly report on all fit / unfit results, employee vision testing history, and status of vision tests (i.e.: pass/warnings/failures if recorded)
- Run reports on any data in the module with the Report Writer tool
- Leverage Medgate's dynamic Metrics tool to effectively analyze vision test count by various dimensions, including employee geographic location, occupation group, and vision test result

Integration Points

The Vision Testing Module integrates with the following modules in Medgate's Occupational Health Software Suite:

- Clinic Visit
- Medical Chart
- Scheduling
- Medical Surveillance Recalls