

Facilitating The Interactive Process
For Employees with Medical Conditions

STATEMENT OF WORK



RELATIONSHIPS AT WORK
Dispute Resolution Services



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STATEMENT OF WORK & PRICING SHEET for 2022-2025

SERVICE	INCLUSIVE OF THE FOLLOWING	2022-2025 RATE*
The Interactive Process Meeting (TIPM)	<ul style="list-style-type: none"> • Pre-IPM set-up, scheduling, communication via interim email and phone/video conferencing • Pre-IPM Documentation Review • IPM Facilitation (1.25 hours) • IPM Summary Report (1.25 hour) • IPM services remain available via ZOOM or MS Teams Video Conferencing • On-site meetings available upon request; travel billed separately from flat rate. • NOTE: For IPM cancellations 24 hours or less, a cancellation fee of \$195 applies 	\$600 per TIPM
Hourly Rate Services (outside of Flat Rate)	<ul style="list-style-type: none"> • Additional Meeting time outside in excess of 1.25 hours included in flat rate • Completion of DWC Notice of Offer on behalf of Employer Claims Administrator for work-related medical conditions • Correspondence to Medical Providers with Customized Questionnaires to frame issues for resolution of accommodation issues • Travel (inclusive of mileage) • Other specialized requests such as Fitness for Duty (FFD) coordination • Extended consultative meetings and/or research on issues 	\$195 per hour
Training (Customized)	<p>Training is available in the following customized formats to meet your needs:</p> <ul style="list-style-type: none"> • 1-hour, 2-hour, half-day, and full-day training • Delivered on-site or via ZOOM • PROFESSIONAL DEVELOPMENT for Administrative Assistants • REASONABLE ACCOMMODATION training for supervisors, managers and administrators. • LEADERSHIP DEVELOPMENT for emerging leaders 	Pricing varies
Job Descriptions and Job Analyses	Development of detailed job analyses and updated job descriptions	Pricing depends on scope of project
Dispute Resolution Services	Workplace Mediation and Facilitated Dialogue services to address team conflict and challenged working relationships	Pricing varies with scope of services.

Contracted rates and services as negotiated with San Diego and Imperial Counties JPA are extended to individual school districts for IPMs for employees with non-work related medical conditions and/or non-JPA members.



Easy Access...Easy Implementation

Visit <https://relationships-at-work.com/tip/>

Here's what you'll find:

- 1) Access a [narrative overview](#) of the laws involved and what happens at the interactive process...how to get started with a 4-step process to follow.
- 2) A [10-minute video](#) that explains the interactive process. Something to share with your colleagues, employees and supervisors who participate in the process or help manage the process.
- 3) Schedule a [pre-IPM phone call](#) to discuss the upcoming IPM or make arrangements to meet 15 minutes prior to the start of the IPM to familiarize with the issues and concerns presented by the employee's medical condition.
- 4) Use the [easy, online scheduler](#) to find a time that works for you. Complete a short questionnaire to provide needed information, upload the employee's job description, medical documentation, and 'leave' history.

NOTE: Services are delivered via ZOOM Video Conferencing – instructions for access provided during the scheduling process. On-site IPMs available only upon request.

- 5) Additional forms available upon request:
 - a TIP Online: a guide to share participants new to the process with tips on the optimal environment for participating on ZOOM and an overview of the meeting structure.
 - b Checklist for managing the Interactive Process
 - c Sample Chronological Medical | Leave History Template
 - d Employee 'Consent to Exchange Medical Information' Form
 - e Flowcharts to guide you along the way
- 6) And [SUBSCRIBE to 'Decoding the Conflict Mindset'](#) – a monthly podcast with breaking news from Subject Matter Experts about tips and strategies on managing employees in conflict. [SUBSCRIBE to 'Monthly Q&A with Felicia and Debra'](#) where 'hot topics' are discussed that impact employers and employees when medical conditions impact the ability to 'be at work, stay at work, and perform the work.'
- 7) [Let's Talk](#) to discuss 'training' and 'professional development' opportunities for you and your administrative and management staff. Many accommodation missteps happen at the frontline of supervision. Train your Principals, Assistant Principals and Management Staff on how to effectively respond to the impact of medical conditions on 'being at work, staying at work, and performing the work' and how to involve you early on.

As part of your annual professional development requirements, consider training for your administrative staff on effective workplace communication and conflict management strategies.



Dr. D's BACKGROUND

Debra Dupree is a Workplace Mediator, Workforce Management Consultant, International Trainer and Keynote Speaker with 30+ years of experience.

She provides organizational consultation on employee-management relations, professional development training opportunities, workshops on disability and reasonable accommodation practices, and dispute resolution strategies. Debra has an extensive training and conflict management background, training professionals throughout North America in workplace mediation and leadership strategies. She was rated in the top ten trainers for SkillPath Corporate Strategies by workshop participants.

Her clients include a range of public and private entities such as the San Diego County Office of Education Joint Powers Authority, the Department of Navy - Southwest Region, County of Imperial, Imperial Irrigation District, Imperial Valley Housing Authority, Cal Poly Pomona, Cal State San Marcos, Cal State Sacramento, Cal State Fullerton, Port of San Diego, Honeywell, Qualcomm, Boeing, Eastern Municipal Water District, Helix Water District, Hewlett Packard, SkillPath Corporate Strategies and many more.

Her book "Uncovering the Psychology of Good Bosses vs. Bad Bosses and What It Means for Leadership" is based on her many years of mediation experience and doctoral level research. She has authored numerous articles | eBooks and launched the **Trilogy Workshop Series on Navigating the Interactive Process** now available through self-study webinar and live practicums.

Debra also hosts 'The Monthly Q&A' with JPA Representative Felicia Amenta and 'Decoding the Conflict Mindset' monthly podcast. Debra's disability and medical background cover more than 30 years achieving the following certifications:

Vocational Assessment & Disability Management:

1986: Certified Rehabilitation Counselor (CRC) & Licensed Marriage & Family Therapist (LMFT)

1990 & 2000: Certified Ergonomic Evaluation Specialist (CEES)

1990: Certified Case Manager (CCM) & Windmills Certified Professional in Disability Awareness

1997: Certified Professional in Disability Management (CPDM)

2002: Certified as a Woman-Business Owned Enterprise (WBE)

2005: Advanced Practitioner in Workplace Mediation (AP)

2008: Certified High Conflict Diversion Professional (Psychological Disabilities)

2010: Certified Conflict Coach (Manager-Employee Relations)

Debra served as the President of the California Association of Rehabilitation Counselors when the Americans with Disabilities Act (ADA) was passed and on the Board of Directors when major changes to the California Workers' Compensation were enacted by Legislature in 1994. She was featured in Newsweek as one of San Diego's top psychotherapists, recognized by the Los Angeles Federal Executive Board for her workplace mediation expertise, and distinguished as a leader in dispute resolution by the Southern California Mediation Association and the Association for Conflict Resolution.

Today, she is on the Board of Directors for the Southern California Mediation Association (SCMA) and Chair of the Employment Mediation Institute. She also serves as a Panel Member for the Employment Mediation Division of the American Arbitration Association. She is also affiliated with DMEC, RIMS, ASSE, ACSA, PARMA, ABA, AAA, ICDR, and more.



THE AGILE
Workplace

OVERVIEW

The Interactive Process (TIP) is a way for the employee with the medical condition to work with their employer in a confidential and collaborative process when medical limitations exist to explore how to restore the employee to full functioning in the essential functions of their job - with or without accommodation.

Hi, I'm Dr. Debra Dupree, PsyD, and I assist employers and employees navigate through the process and the laws that apply.

Together, we explore and mutually reach resolution(s) on how to help employees "be at work, stay at work, and perform the work" of their assigned jobs to meet business needs without "direct threat" or "undue hardship."

HOW TO CONTACT DR. D

PHONE:
619.433.4264

WEBSITE:
<https://relationships-at-work.com>

EMAIL:
Dr.dupree@relationships-at-work.com

TIP ONLINE

How to access via ZOOM or Phone

Thank you for joining me online to facilitate the interactive process.

If you are a first-time ZOOM participant, be sure to check out your connection BEFORE the start time of the IPM so there are no delays in getting started on time. Allow 75 minutes plus 15.

Click here to watch this [SHORT 8-minute VIDEO](#) to familiarize yourself with what is covered at the meeting.

On the day of the meeting, plan to logon 3-5 minutes before the start time by clicking here (or copy/paste) the URL into your browser:

1) Video participation: <https://relationships-at-work.zoom.us/s/9071654400?pwd=WWdNaXlqRXptV3BEdG9BWVhMHJPZz09#success>

If prompted, enter Password: Dupree2020

2) While Video is preferred but if not available, dial: 1-669-900-6833. Enter the following information:
Meeting ID: 907 165 4400 | Password: 466914

Note: This is confidential information for protection of the employee with a medical condition. Do not pass it on to anyone who is not essential to the meeting. All parties first enter Dr. D's "Waiting Room" before entry into the meeting.

I look forward to working with you.

Stay safe...stay healthy...stay positive!

Dr. Debra Dupree, Workplace Mediator & IPM Facilitator

TIPS FOR ZOOM USE:

- 1) Sit or stand so that the screen of your device is at eye level.
- 2) Avoid sitting in front of a window as the bright light from outdoors will create a “halo” effect and darken your face (like taking a photo with the sun behind you).
- 3) Choose a quiet space to minimize distractions from others in the household, pets, and noises.
- 4) Have some water nearby to keep hydrated.

HOW THE MEETING WILL GO:

1) WELCOME & INTRODUCTIONS:

Dr. D facilitates by welcoming all participants and having them introduce themselves and the role they play at the IPM.

An overview of the process is then presented to highlight relevant laws that drive the purpose of the meeting, introduces key terms, and phases of the process to be covered in the 75- to 90-minute duration.

2) MEDICAL INFORMATION REVIEW:

Dr. D then presents the medical information available.

3) EMPLOYEE INPUT:

The employee is asked to comment on how the medical condition impacts activities of daily living, agreement and/or disagreement with the medical provider’s limitations, the recovery process and provide any other relevant information about the condition as it pertains to the ability to “be at work, stay at work or perform the work.”

4) EMPLOYER OVERVIEW:

The employer representative is asked to provide an overview of current department operations, the number of employees involved in comparable positions, and other factors relevant to the current situation.

5) REVIEW OF JOB DESCRIPTION and ESSENTIAL FUNCTIONS:

The parties engage in a review of the essential functions and comparison to the medical limitations identified.

6) DISCUSSION OF REASONABLE ACCOMMODATION(S):

The parties mutually discuss and explore the impact of the limitations on performance of the essential functions and what accommodation(s) might be possible.

7) EXPLORATION OF JOB ALTERNATIVES (as needed):

If accommodation is not readily achievable in the usual occupation, or if direct threat exists, the parties then address what current job alternatives are available and if the employee meets the job qualifications.

8) SUMMARY OF OPTIONS AVAILABLE AND NEXT STEPS:

The parties summarize findings for next steps.



The Interactive Process

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PHASE ONE: Getting Started

#1 Employee identified with a medical condition

Applies to work-related
Applies to non work-related health conditions
Applies to underlying conditions impacted by COVID-19

#2 Ability to be at work, stay at work, perform the work is in question

Schedule [Pre-IPM consult](#) with Dr. Dupree, IPM Facilitator

#3 Initiate the Interactive Process

[Use Online Scheduler](#)
Complete Meeting Request Form
Upload Documentation

NOTE: A refresher on the process and related steps is also available here: <https://relationships-at-work.com/tip/>

#4 Documentation Needed

Job Description
Medical Info (if available)
History of attendance (use of leave balances)

#5 Employer's Notification to Employee

Letter, Medical Questionnaire & Job Description
Samples available upon request
Send Employee to <https://relationships-at-work.com/tip/>

#6 Forward Meeting Invite

Supervisor
Site Decision-maker
Employee invites others if desired



The Interactive Process Meeting

PHASE TWO: What happens at the IPM?

Introductions
Overview of Process
Agenda | Meeting Summary for later Review

Presentation of Medical Information

Review of available information from all applicable providers (PTP, PQME, AME)
Do temporary limitations exist or is employee MMI | P&S?
Process is confidential due to HIPAA guidelines

Employee's Input on Impact of Condition

Onset of Condition
Impact on Activities of Daily Living
Current Level of Functioning

Department Overview

Supervisor | Onsite Decision-Maker Description
Identify Impact of Employee's Condition on Operations | Delivery of Service | Others

Review of Essential Functions

Review of Job Description
Identify Essential Functions Impacted by Functional Limitations (All parties provide input)

Reasonable Accommodation Discussion

Confirm # of Essential Functions impacted
Identify where modifications can be implemented
Does not include ongoing assistance from others or removal of essential functions



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The Alternative Job Search Process

PHASE THREE: Alternatives

Reassignment to a current opening for which the employee qualifies
Must be a regular position, typically lasting at least one year
Able to perform essential functions with or without accommodation

Temporary Leave as an Accommodation

May apply if employee is not ready to return to work and all other leaves have been exhausted.
Must be finite and short-term

Use of Education Code's 100 days of half-pay

How it works
How long it lasts
What if exhausted

39-month rehire under Ed Code

School districts must transfer employee to an unpaid status without benefits
Employee remains eligible for rehire should medical condition improve, an appropriate opening develops where skills exist

Coordination with Workers' Compensation

Review if medical condition is work-related
Job Retraining Voucher and how it works
Financial implications of the Workers' Compensation case

Supplemental Resources

PERS or CalSTRS Retirement (if applicable)
Social Security Disability Income (SSDI)
Other Long-term Disability benefits when applicable