



CTS User Manual

Surveillance Program Enrollment Action Request (SPEAR)

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Introduction

Surveillance Program Enrollment Action Request

The surveillance program enrollment action request (SPEAR) module of CTS is designed to help a supervisor manage their worker's medical surveillance qualifications. A secondary, yet very important goal of the SPEAR is to share requests for enrollment change automatically with the Industrial Hygiene and Medical Departments so each request can be processed, tracked and closed in a timely and high-quality manner.

This document seeks to provide examples for how the SPEAR can be used by the Supervisor, the Industrial Hygiene Program Lead, Medical Coordinator and the ESH-HR Enrollment Coordinator.

Roles that play a part in the SPEAR and which are discussed below are:

- Supervisor With Direct Reports
- Industrial Hygiene Program Lead
- Medical Coordinator
- ESH-HR Enrollment Coordinator

Chapter 2: Accessing SPEAR

There are several pathways to access the SPEAR, however in this chapter will discuss using the Portal. Other pathways, such as an Email from your ESH-HR coordinator will be discussed in subsequent chapters.

To access the Portal your administrator will provide a link or web page. Click the link or webpage and authenticate as needed for your system.

In the **Portal** menu, under *Supervisor Portal* submenu, click the **CTS591: Safety and IH Summary For My Direct Reports** button.

CTSPORTAL /
 CTS591: Safety and IH Summary For My Direct Reports

Welcome CHARITY COX

Direct Reports

Search: Go Rows: 100 Actions

Last Name	First Name	Badge	Job Title	Email	Medical Surveillance	Exposure Monitoring
IHSAFETYPRO	SANDY	IHSPBADGE	INDUSTRIAL HYGIENIST	IHSP@FAKE.MAIL	ACRYLONITRILE (M0000003) ANIMAL HANDLER (M0000021) ARSENIC (INORGANIC) WORKERS (M0000010) ASBESTOS WORKERS (M0000011) BENZENE (M0000004) BENZIDINE (M0000005) BERYLLIUM QUALIFICATION PROGRAM (M0000001) BIOHAZARD WORKERS (M0000013) CADMIUM WORKERS (M0000014) COMMERCIAL DRIVER EXAM (M0000022) ETHYLENE OXIDE (M0000006) FORMALDEHYDE (M0000007) HEARING CONSERVATION WORKER (M0000015) HIGH ALTITUDE WORKER (M0000023) HUMAN PATHOGENS (M0000024) LASER WORKER (M0000025) LEAD WORKER (M0000016) METHYLENE CHLORIDE (M0000008) NANO WORKER (M0000018) RESPIRATORY PROTECTION WORKER (M0000026) SILICA WORKER (M0000019) THALLIUM WORKER (M0000020) TOWER CLIMBER (M0000027) VINYL CHLORIDE (M0000009)	ID: SID00046 SID0004604 17-JUN-2022 1-BROMOPROPANE 2 PPM

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You will be presented with a list of workers. The list of workers will be those for whom you are listed as the supervisor in the database. If the names are different than you expect please work with your system administrator to determine the cause. If your worker is currently enrolled in a medical surveillance program or exposure monitoring program, the program will be displayed.

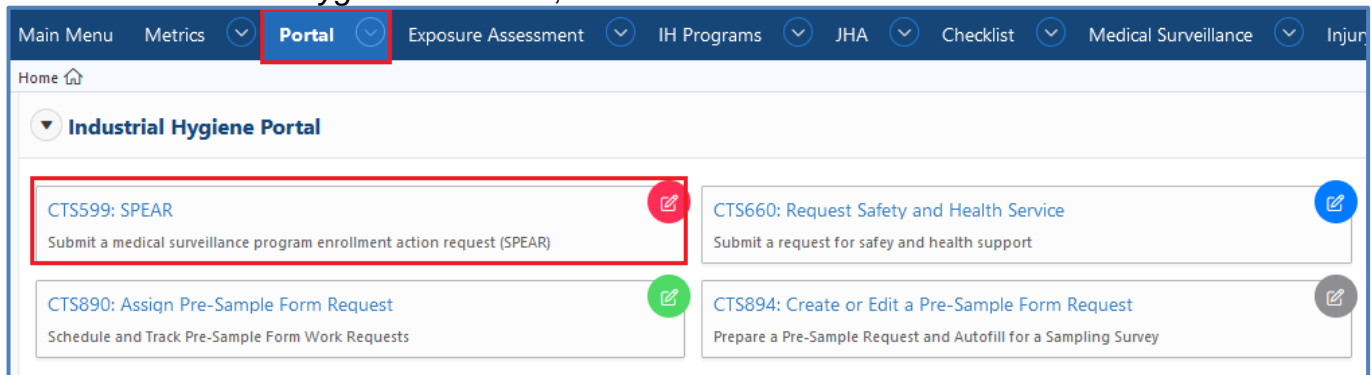
Click the *CTSPORTAL* / breadcrumb to return to the **Portal** menu.

[CTSPORTAL /](#)

CTS591: Safety and IH Summary For My Direct Reports

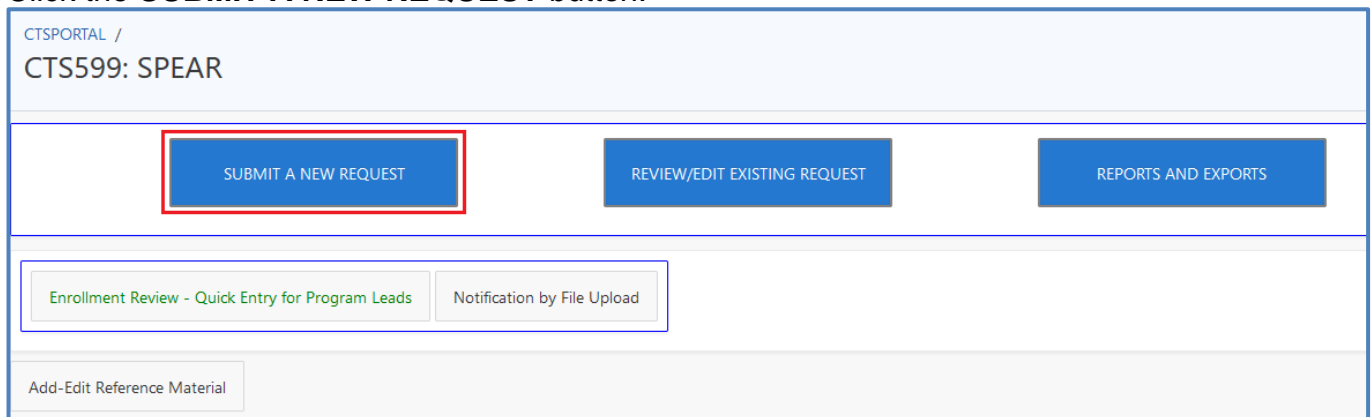
Submit A New Request

Under the *Industrial Hygiene* submenu, click the **CTS599: SPEAR** button.



The screenshot shows a navigation menu with the following items: Main Menu, Metrics, Portal (highlighted with a red box), Exposure Assessment, IH Programs, JHA, Checklist, Medical Surveillance, and Injur. Below the menu is a section titled "Industrial Hygiene Portal" with a dropdown arrow. Under this section, there are four request options, each with an edit icon: "CTS599: SPEAR" (highlighted with a red box), "CTS660: Request Safety and Health Service", "CTS890: Assign Pre-Sample Form Request", and "CTS894: Create or Edit a Pre-Sample Form Request".

Click the **SUBMIT A NEW REQUEST** button.



The screenshot shows the page header with "CTSPORTAL /" and "CTS599: SPEAR". Below the header is a row of three blue buttons: "SUBMIT A NEW REQUEST" (highlighted with a red box), "REVIEW/EDIT EXISTING REQUEST", and "REPORTS AND EXPORTS". Below the buttons is a section with two tabs: "Enrollment Review - Quick Entry for Program Leads" and "Notification by File Upload". At the bottom of the page is a button labeled "Add-Edit Reference Material".

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To submit a new enrollment action request, enter the worker identifier in the *Enter Badge ID* field and click **Add Single Worker** button.

Enter job duties, assignment start date, and primary reason for review.

The bottom portion of the SPEAR screen will list site medical surveillance programs in three major categories:

- Chemicals
- Activities
- Certifications

Some programs may fit into two categories but only one can be assigned. The important point is you choose the program you need.

Click checkboxes to select ALL programs that apply to this job assignment even if you know they already have the program. If you do not choose a program the system will assume the hazard no longer applies to the job and if the pre-existing program is not considered lifetime, a change request to disenroll will be issued.

Lifetime programs are identified by the † symbol.

If the current job no longer requires any medical surveillance programs, check the box indicating no programs are needed. Once checked it will turn green and close the other program areas.

The screenshot shows a software interface for selecting hazards, activities, and certifications. At the top, there is a dropdown menu labeled "Select Hazards, Activities and Certifications Associated to the Job". Below this, there are four horizontal bars. The first bar is green and contains a checked checkbox and the text "Check here if there are NO potential exposures to hazards AND NO required certifications programs." The second bar is grey and contains a play button icon and the text "Check All Chemicals That Apply to Job". The third bar is grey and contains a play button icon and the text "Check All Activities That Apply to Job". The fourth bar is grey and contains a play button icon and the text "Check All Certification Programs That Apply to Job".

Click the **Submit Enrollment Action Request** button.

Cancel Submit Enrollment Action Request

▼ Create a Worker List For This Request

Enter Badge ID Add Single Worker ←

	Last Name	First	Badge ID	Email	Job Title	Supervisor	Supervisor Email
X	WORKER	WILLIAM	WKRBADGE	WORKER@FAKE.MAIL	OPERATOR	SUPERVISOR	SUPERVISOR@FAKE.MAIL

▼ Complete the Job Assignment Description

Current Assignment (Org,Job Title,Location) OPERATOR OPL1 OPL1 AREA 3 BUILDING 3 ROOM 2

Please Describe Job Duties and Tasks to Help Evaluate Hazards 59 of 3000

Assignment Start Date 10/26/2022

Primary Reason for Review ADDITIONAL ACTIVITY HAZARD AT THE WORKSITE

▼ Select Hazards, Activities and Certifications Associated to the Job

Check here if there are NO potential exposures to hazards AND NO required certifications programs.

▼ Check All Chemicals That Apply to Job

- ACRYLONITRILE
- BENZENE
- BENZIDINE
- ETHYLENE OXIDE
- FORMALDEHYDE
- METHYLENE CHLORIDE
- VINYL CHLORIDE

▼ Check All Activities That Apply to Job

- ANIMAL HANDLER
- ARSENIC (INORGANIC) WORKERS
- ASBESTOS WORKERS
- BERYLLIUM QUALIFICATION PROGRAM
- BIOHAZARD WORKERS
- CADMIUM WORKERS
- HEARING CONSERVATION WORKER
- HUMAN PATHOGENS
- LASER WORKER
- LEAD WORKER
- NANO WORKER
- RESPIRATORY PROTECTION WORKER
- SILICA WORKER
- THALLIUM WORKER

▼ Check All Certification Programs That Apply to Job

- COMMERCIAL DRIVER EXAM
- HIGH ALTITUDE WORKER
- TOWER CLIMBER

+ Indicates that a program is considered lifetime enrollment. Once enrolled, an employee is never removed.

Cancel Submit Enrollment Action Request

A success message is displayed on-screen.

Surveillance Program Enrollment Request Submitted

Your Surveillance Program Enrollment Request has been submitted. You may now close this window.

Your job as a supervisor is now completed for requesting surveillance programs. Industrial Hygiene and Medical will be notified and may contact you.

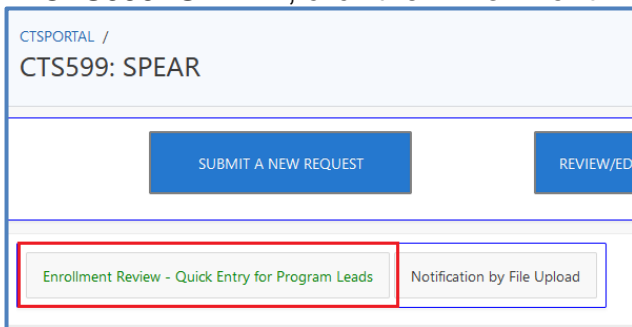
Chapter 3: Industrial Hygiene Program Lead

IH Program Lead Enrollment Change Review

There are a few surveillance programs that are flagged for Industrial Hygiene (IH) concurrence whenever a Supervisor requests a change of enrollment (either ENROLL or DISENROLL).

Whenever there is a change of enrollment and the program requires an IH review, the IH is notified and the request for that program is placed in a review queue. If there is no need for an IH review the request is immediately forwarded to Medical.

In **CTS599: SPEAR**, click the **Enrollment Review – Quick Entry For Program Leads** button.



Use pulldown menu to select *PH/IH Decision* for a specific request. Click the **Click To Apply Decisions (Only decisions with a completed reason will be processed)** button.

The screenshot shows the 'Enrollment Review - Quick Entry for Program Leads' interface. At the top, there is a search bar and a dropdown menu for 'Autofill Reason For Decision'. Below that is a button 'Click To Apply Decisions (Only decisions with a completed reason will be processed)' highlighted with a red box. Below the button is a table with columns: Program Title, Program ID, Employee, Badge, Job Title, Current Status, Request, PL/IH Decision, Add/Edit Reason, Decision Reason, Description of Job Duties, Ref ID, Questionnaire, Request Date, and Requested By. The table contains three rows of data. The 'PL/IH Decision' column for the first row has a dropdown menu with 'CONCUR' selected. The second and third rows have 'NEED DECISION' selected. The 'Add/Edit Reason' column has a pencil icon for each row.

Program Title	Program ID	Employee	Badge	Job Title	Current Status	Request	PL/IH Decision	Add/Edit Reason	Decision Reason	Description of Job Duties	Ref ID	Questionnaire	Request Date	Requested By
LEAD WORKER	M0000016	WORKER,PP, WILLIAM	WKRBADGE	COMPUTER SUPPORT	NOT ENROLLED	ENROLL	CONCUR		non standard direct entry for me	Current Org and Job Title: COMPUTER SUPPORT MEDICAL MEDICAL AREA 1 BUILDING 1 ROOM 4 Duties Described By Supervisor: Please Describe Job Duties and Tasks to Help Evaluate Hazards	0000012	-	01-SEP-2022	CTSOWNER
NANO WORKER	M0000018	WORKER,PP, WILLIAM	WKRBADGE	COMPUTER SUPPORT	NOT ENROLLED	ENROLL	NEED DECISION		ddddddddddddd	Current Org and Job Title: COMPUTER SUPPORT MEDICAL MEDICAL AREA 1 BUILDING 1 ROOM 4 Duties Described By Supervisor: Please Describe Job Duties and Tasks to Help Evaluate Hazards	0000012	-	01-SEP-2022	CTSOWNER
THALLIUM WORKER	M0000020	WORKER,PP, WILLIAM	WKRBADGE	COMPUTER SUPPORT	NOT ENROLLED	ENROLL	NEED DECISION		ssssssssssssss	Current Org and Job Title: COMPUTER SUPPORT MEDICAL MEDICAL AREA 1 BUILDING 1 ROOM 4 Duties Described By Supervisor: Please Describe Job Duties and Tasks to Help Evaluate Hazards	0000012	-	01-SEP-2022	CTSOWNER

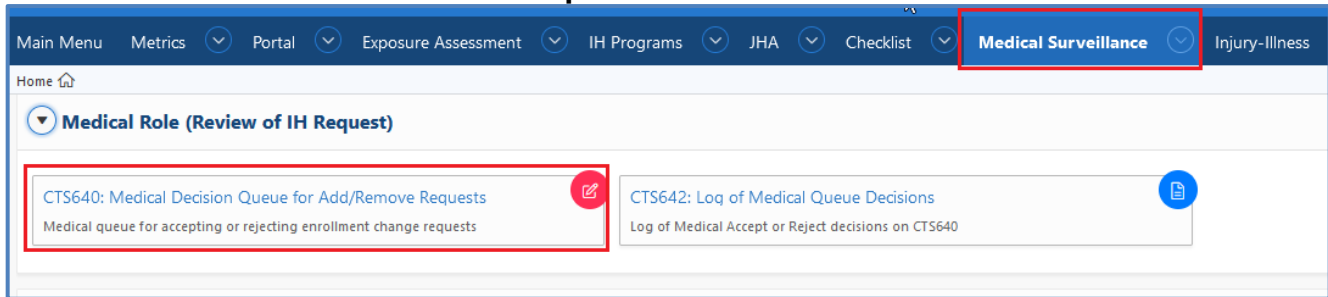
Once the IH review is completed, the request is moved to Medical along with the IH recommendation on the enrollment change request.

Chapter 4: Medical Coordinator

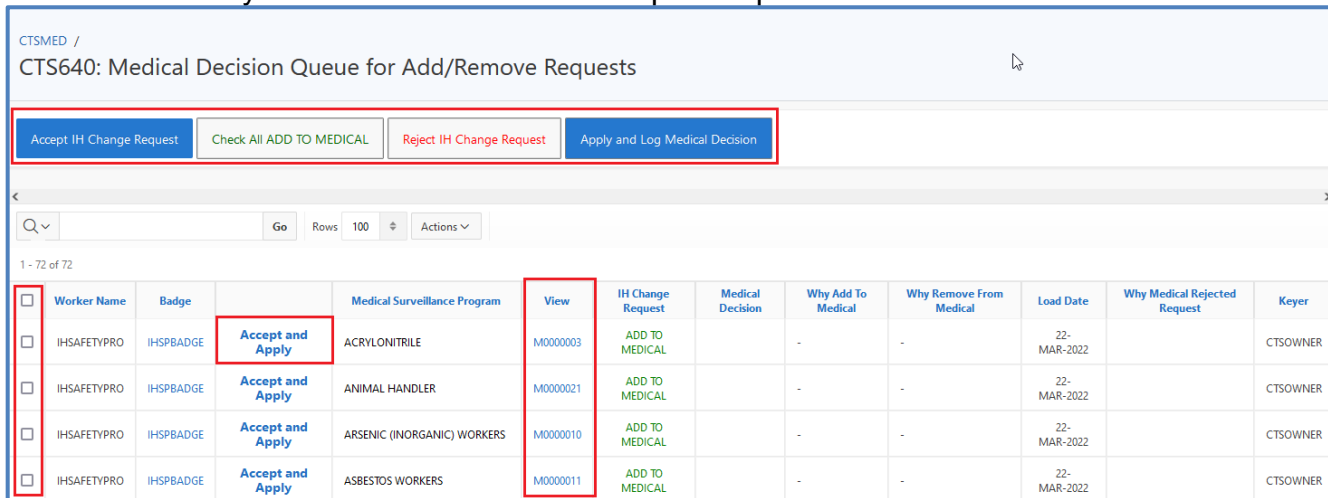
Medical Queue Review Decisions

All SPEAR entered by the supervisor that create a change request are added to the medical review queue. The SPEAR programs that require an IH review briefly veer off path but are still added to Medical if a change request is identified. The Medical Coordinator role is to review this queue periodically and reconcile it with their actual medical system. This process of reconciliation is manual unless computer processes are implemented to automate actions between the SPEAR system and the Medical system.

To accept/reject enrollment change requests, navigate to **Medical Surveillance** menu, under *Medical Role (Review of IH Request)* submenu. Click the **CTS640: Medical Decision Queue for Add/Remove Requests** button.



Click checkbox(es) to select request(s). Use buttons to accept, reject, add to medical, or apply and log decision. For one request at a time, click the **Accept and Apply** blue text in the row. Click any **View** hotlink to view the request report.



Qualification Program Detail	
Program ID	M0000003
Program title	ACRYLONITRILE
Program Lead	IHSAFETYPRO,SANDY (IHSPBADGE)
<u>Enrollment Criteria</u>	
<input checked="" type="radio"/> Chemical or Physical Hazard Program	
<input type="radio"/> Hazardous Activity Program	
<input type="radio"/> Certification Program	
<input checked="" type="checkbox"/>	Check to List on CTS599 Surveillance Program Enrollment Request Form
<input checked="" type="checkbox"/>	Check to Require a Program Lead Concur or NoConcur on CTS599
<input type="checkbox"/>	Check to Indicate if once Enrolled, the Enrollment is Lifetime
<input type="checkbox"/>	Check to show this program on the 178 and 179 reports for AU Roster comparison
<input type="checkbox"/>	Check to ALWAYS accept Medical as correct - Force IH List to Match Medical when 623 is Imported
<u>DeEnrollment Criteria</u>	

Close browser tab when finished viewing report.