

Case Study One – Documentation

Transferable Skills Analysis One - August 9, 2005

August 9, 2005

ATTENTION:

REGARDING:
EMPLOYER:

D.O.B.:
SS #:

TRANSFERABLE SKILLS ANALYSIS

OVERVIEW:

This file was referred to _____ on 08/08/05 to conduct a Transferable Skills Analysis regarding _____ was employed as a Sr. Account Manager for _____ Elevator before he became disabled.

PURPOSE:

To determine if there are occupations which _____ can perform, taking into consideration his transferable work skills, education, training, functional capacities.

EDUCATIONAL BACKGROUND:

_____ indicated in a Disability Questionnaire, he completed his Bachelor's Degree in Speech Communication and a Masters Degree in Management.

EMPLOYMENT HISTORY:

<u>JOB TITLE:</u>	Sr. Account Manager (Sales Manager)
<u>EMPLOYER:</u>	Otis Elevator
<u>DATES OF EMPLOYMENT:</u>	1988 - 1996
<u>D.O.T. CODE #:</u>	163.167-018
<u>GOE:</u>	11.05.04
<u>STRENGTH:</u>	Sedentary
<u>SVP:</u>	8

CURRENT WORK RESTRICTIONS:

In a Physical Ability Assessment,

lists the following:

Continuously:

Sitting

Frequently:

Lift 10 lbs.

Carry 10 lbs.

Occasionally:

Standing

Walking

Lifting 11 – 20 lbs.

Carry 11 – 20 lbs.

Push (max 20 lbs.)

Pull (max 20 lbs.)

Exposure to: Extremes in heat, cold, wet/humid conditions

Vibration

Work around machinery

lists the following as "None":

Lift

21 - 100 + lbs.

Carry

21 - 100+ lbs.

Climbing (regular stairs and regular ladders)

Balancing, stooping, kneeling, crouching, crawling, work extended shifts/work extended shifts/overtime, use lower extremities for foot controls.

RESEARCH/TRANSFERABLE SKILLS ANALYSIS METHODOLOGY:

Research involved use of Lifestep Research 5.0 (updated 1997), a database program of all occupations in the Dictionary of Occupational Titles (DOT). The DOT contains a listing of over 12,000 job titles. This U.S. Department of Labor Publication contains standardized comprehensive descriptions of job titles, job duties, and related information for 20,000 occupations. This covers nearly all jobs in the U.S. Economy and groups occupations into a systematic occupations classification structure based on interrelationship of job tasks and requirements.

The following search criteria were applied to all titles in the DOT:

- Work Field and MPSMS Matches adjusted for SVP levels according to the client's work history.
- Adjusted Client Profile – Per physical ability assessment
- Skills Transference Limits – Highest available level of transference.
Job titles are divided into levels arranged in order of decreasing transferability. Each level compares a person's skills, as demonstrated in work experience, with selected jobs from the Dictionary of Occupational Titles (DOT). These comparisons describe levels of transferability from 1 to 9.
- Claimant's skills and knowledge including management, proposal development, customer service, inspection of elevators.

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Additional resources may include employers/industry contacts, regional employment data and/or vocational counseling experience.

APPROPRIATE OCCUPATIONS IDENTIFIED:

The following are potential occupations history, education and physical abilities. could perform taking into consideration his skills, work

Business Rep. Labor Union

DOT CODE #: 163.167-018
GOE: 11.05.04
Physical Strength: Sedentary
Specific Vocational Preparation: 8
Skills Transference: Level I

Manager, Sales

DOT CODE #: 163.167-108
GOE: 11.05.04
Physical Strength: Sedentary
Specific Vocational Preparation: 8
Skills Transference: Level I

Manager, Office

DOT CODE #: 169.167-034
GOE: 07.01.02
Physical Strength: Sedentary
Specific Vocational Preparation: 7
Skills Transference: Level I

SUMMARY:

A Transferable Skills Analysis was completed utilizing the above information. The occupations of Business Rep, Labor Union; Manager, Sales; and Manager, Office were identified as potentially appropriate taking into consideration work history experience, educational background, and physical restrictions.

This concluded our Transferable Skills Analysis. If you have any questions please feel free to contact me at

Prepared By:

Vocational Rehabilitation Counselor

Transferable Skills Analysis Two – April 28, 2006

April 28, 2006

TRANSFERABLE SKILLS ANALYSIS

A. INTRODUCTION

A Transferable Skills Analysis was requested regarding the above-captioned claimant. By way of summary, the claimant is 39 years of age, resides in _____ Pennsylvania (zip code _____).

The claimant is status post multiple knee surgeries and last employed in a position referred to as Account Manager for _____ Elevator, where he was injured in 1990. The claimant reported light duty assignments in 1991 and it appeared the claimant's last day worked was in 1996. The target wage requirement for this assessment was described as \$1,350.00 per month (approximately \$7.87 per hour).

Records provided for review include an Independent Medical Evaluation (2/10/06); report of claimant's treating physician (4/13/06); Physical Ability Assessment attached with Independent Medical Evaluation (2/10/06); previous Transferable Skills Analyses (7/29/96, 8/9/05); claimant's disability questionnaire; claimant's activities of daily living questionnaire.

B. MEDICAL SUMMARY

Per referral request, consideration was to be given to the Independent Medical Evaluation of 2/10/06. The physician completed a Physical Ability Assessment to allow for continuous sitting, occasional standing, occasional walking, with lifting and carrying maximum ten pounds. The physician also noted under "fine manipulation" that it was not applicable to the diagnosis, however, remarked "may be limited by effects of medication". In the narrative report, the IME physician remarks "will need easy access for transportation, especially since he is not driving". The physician also remarks "with a combination, I believe he can perform full time sedentary work duties provided he can easily get back and forth to work and that his work would allow reasonable accommodations in terms of moving around." The physician did not specify time periods in terms of "moving around".

Within the IME narrative report, it was mentioned that the claimant does do some driving short distances, however, the IME physician did specify need for access to public transportation. The report of treating physician, _____, (4/13/06), specifically cited the claimant's requirement to have transportation provided everyday of his work schedule. These specific

issues of transportation were not requested to be assessed via the Transferable Skills Analysis. Options will vary based upon geographic area and individual circumstances which could include public transport, employer sponsored transport, carpool, family members providing transportation, etc. The existence of such within the claimant's specific locale and personal circumstances were not requested to be reviewed for this assessment.

While the Independent Medical Evaluation does reference the need to reasonably "move around" no specific timeframes were specified. Sedentary office positions in areas such as Inside Sales, Customer Service, through prior surveying have been found to typically allow for position change from sit to stand as needed. The treating physician, _____, in his report of 4/13/06 specified " _____ also requires the ability to move around from a simple sedentary position approximately 10 to 15 minutes for at least five minutes". This degree of specificity would not appear to be compatible with typical competitive work demands. Moving away from the workstation and walking for five minutes every 15 minutes would not appear to be consistent with typical requirements for productivity and maintaining a work pace.

For the purposes of this assessment, sedentary employment with occasional position change from sit to stand would be considered. The Independent Medical Evaluation does reference the possible restriction on fine manipulation, however, not specified as a restriction. If information became available as to specific restrictions on upper extremity use, this would impact the job options mentioned.

C. VOCATIONAL AND EDUCATIONAL HISTORY

The claimant indicated he has a Masters Degree in Management (1995) and a Bachelors Degree in Speech Communication (1988). The claimant's employment history was with a single employer, _____ Elevator, where he referred to his job title as an Account Manager with the claimant's specification of duties as going throughout the New York City area visiting customers, estimating jobs, selling contracts, doing elevator traffic studies and examining shafts and elevators. Also, the claimant indicated he would collect monies on accounts and write proposals. This position was described as extending from 1988 through 1996.

The claimant referenced his duties as an Account Manager as entailing walking, climbing, bending, crouching, kneeling and traveling. The claimant, on an additional disability questionnaire, referenced his duties as "selling maintenance and modernization contracts to current customers and prospects" indicating sitting 20%, standing 70%, with the remaining 10% involving stooping, climbing and bending and carrying ten pounds frequently walking city blocks.

While the claimant refers to his position as "Senior Account Manager", it appears that the "management" function was related to his handling specific accounts in a territory. It did not appear that he had a department or other personnel or staff that he was overseeing. The Account Manager would appear to have been more related to a Field Sales position of technical equipment involving servicing existing customers, prospecting new customers and providing technical expertise in terms of elevator operation and assessment of need. While there is no D.O.T. specifically for selling elevator maintenance, the closest would appear to be a Sales Representative, Mechanical Equipment and Supplies, with a specific product line as elevators and escalators as indicated below.

Job Title: Sales Representative, Mechanical Equipment & Supplies
D.O.T.#274.157-010

Selected Characteristics: Light exertional level. This position is considered at the skilled level of employment.

Job Duties: Sells passenger freight elevators; contacts property owners and agents of prospective customers, confers with owners of existing structures to determine type of installation required, specs premises, submits specifications; presents bid, explains cost factors.

It appears the claimant's last employment was approximately ten years distant. His specific knowledge of elevator maintenance and modernization would not appear to be applicable. The more general skills, in terms of communication with customers and the ability to promote a product or service, respond to customer inquiries or complaints, present and prepare proposals would remain. While the claimant does have a Masters Degree in Management, his actual work history would appear to be related to direct sales. The advanced education would not appear to allow for direct entry into a management or supervisory capacity, given the date last employed.

D. TRANSFERABLE SKILLS AND OCCUPATIONAL ALTERNATIVES

The claimant resides in Pennsylvania (population 4,700), which is 14 miles to Philadelphia, Pennsylvania and 32 miles to Trenton, New Jersey. The claimant does have eight years of sales experience, Bachelors Degree in Speech and a Masters Degree in Business, however, entry level median wage would be considered given the length of time since last employed. The wages are for the Philadelphia, Pennsylvania area, per the ERI (Economic Research Institute, Redmond, Washington), which is a compilation of private and government wage survey data.

Job Title: Customer Complaint Clerk
D.O.T.#241.367-014

Job Duties: Investigates customer complaints about merchandise, billing or examines records and bills; examines pertinent information, determines nature customer complaint, notifies customer and designated personnel finds and adjustments.
\$23,500 per year

Job Title: Customer Order Clerk
D.O.T.#249.362-026

Job Duties: Processes orders for material and merchandise received by mail, telephone or personally from customer.
\$24,700 per year

Job Title: Telemarketer
D.O.T.#299.357-014

Job Duties: Sells orders for merchandise or service over telephone.
\$21,600 per year

**Although no D.O.T. exists specifically for professional inside sales, positions beyond a more entry and Telemarketer position would be considered.*

SUMMARY

Per referral request, consideration was to be given to sedentary employment in existence within approximate 50-mile radius of the claimant's locale (includes metropolitan areas of Philadelphia, Pennsylvania, and Trenton, New Jersey). Given the claimant's background, education and the metropolitan area to be considered, positions of the type mentioned above would appear to be in existence.

Submitted by,

Transferable Skills Analysis Three – January 18, 2007

WAGE REPLACEMENT: \$2258.00 monthly

CONCLUSION:

A Transferable Skills Analysis was conducted, utilizing the above information, to identify suitable positions that meet work history, educational level, physical restrictions and wage requirement.

The following occupations were identified to be transferable:

DOT Code	Occupation Title	SVP	Strength	WAGE (entry and median)	SOURCE
162.117-014	CONTRACT ADMINISTRATOR	8	S	\$23.46/ \$35.72, hourly	US BLS
163.167-010	MANAGER, ADVERTISING	8	S	\$24.29/ \$41.34, hourly	US BLS
163.167-014	MANAGER, CIRCULATION	8	S	\$22.75/ \$28.99, hourly	US BLS
163.167-018	MANAGER, SALES	8	S	\$31.78/ \$32.00, hourly	US BLS
239.137-010	COMMERCIAL-INSTRUCTOR SUP	8	S	\$14.48/ \$21.81, hourly	US BLS
185.167-034	MANAGER, MERCHANDISE	7	S	\$15.52/ \$20.28, hourly	US BLS
249.137-026	SUPERVISOR, ORDER TAKERS	5	S	\$14.46/ \$20.12, hourly	US BLS

The above occupations did transfer based upon the claimant's work and educational history. This claimant has not worked for 10 years so the wages listed above include entry, as well as the median wages as the claimant may need to start at an entry salary to account for years out of the labor market. Both the entry and median wages listed above did meet the wage replacement requirement.

Job Duties and Description

Senior Service Account Manager