

# Dr. Matheson's ToolKit 2010

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### Includes All Prior Versions

- 1) Cal FCP Manual and Forms and Video - The California Functional Capacity Protocol was developed by Vert Mooney M.D. and Leonard Matheson Ph.D. to quantify the consequences of soft tissue injury in terms of the California disability determination protocol. Developed under contract with the California Workers' Compensation Appeals Board, the Cal FCP requires 90 minutes to 120 minutes to complete. This folder includes all of the materials that are necessary to conduct and interpret the test protocol, with the exception of the tests themselves.
  - a. Cal FCP Manual
  - b. Symptom Description Form
  - c. Evaluation Record Form
  - d. Evaluation Schedule Form
  - e. Health Questionnaire Form
  - f. Case Comparison
  
- 2) Cal FCP Video Demonstration - After the Cal FCP was developed, it was disseminated throughout California for use in rehabilitation clinics that provided evaluation and treatment services to injured workers. A training program was developed, with this video as its introduction. The video depicts Dr. Matheson and staff conducting the protocol, with a short description of each test in the battery, and provides the introduction, rationale, and brief depiction of the Cal FCP test protocol.
  
- 3) Research In Occupational Rehabilitation Slide Shows - Dr. Matheson was the Functional Assessment Team Leader for the Social Security Administration's Disability Determination Redesign Project. Building on the previous experience of the SSA, workers compensation disability determination systems in the United States, and federal disability determination systems in countries throughout the world, a new model of disability determination was developed. This folder contains PowerPoint presentations that provide an introduction to that body of work, along with audio files of Dr. Matheson providing a brief description of each.
  - a. New Model of Disability Determination PowerPoint Slide Show

- b. United States Social Security Work Disability and Functional Tests PowerPoint Slide Show
  - c. The Matheson Evidence-Based Approach to Rehabilitation PowerPoint Slide Show
  - d. Audio Files Slide Shows (2 .wav files = 30 minutes)
  - e. SSA Disability Determination References
- 4) EPIC Lift Capacity Test Introduction - Dr. Matheson developed the EPIC Lift Capacity Test, a progressive demand test of the lift capacity of a person with a medical impairment. The test protocol was granted a United States Patent. Several thousand health care practitioners have been formally trained to administer the protocol, which has become the "gold standard" in rehabilitation throughout the world. This folder includes a PowerPoint presentation that has integrated audio files that is the introductory segment of the training program. The folder also includes a PDF file of the Patent Award and the Rating of Perceived Load chart that has become the standard of the industry for strength tests.
- a. PowerPoint Pack N Go format. Click on PNG Setup and follow the prompts. Audio and PowerPoint files will be unpacked and can play on any computer, even without PowerPoint.
  - b. United States Patent Award.
  - c. Rating of Perceived Load chart.
- 5) Equipment and Test Protocols Linked to Functional Assessment Taxonomy - As part of the Social Security Administration's Disability Determination Redesign Project, several thousand test protocols were reviewed, with intensive reviews of more than 800. Tests, subtests, and scales were linked to the Functional Assessment Constructs Taxonomy. Using the taxonomy, a Target Assessment Battery was developed for each of the major functional assessment areas. This folder includes tables that group scales and instruments in terms of disability model level and provide the source and at least one reference for each.
- a. Eye Hand Foot Coordination Test Protocols
  - b. Hand Coordination Test Protocols
  - c. Global Test Batteries Test Protocols
  - d. Finger Dexterity Test Protocols
  - e. Hand Speed Test Protocols
  - f. Hand Strength Test Protocols

g. Manual Material Handling Test Protocols

- 6) Feasibility Evaluation Checklist Resources – Dr. Matheson developed the FEC what he was the director of the Vocational Evaluation Service at Rancho Los Amigos Hospital in Downey California. This instrument is used to evaluate “feasibility for competitive employment”, a construct in widespread use that represents the basic criteria that any employer in the competitive labor market has for all employees. Inability to meet any of these criteria constitutes a threat to the employee’s feasibility for ongoing employment. This folder contains the information and materials necessary to implement the FEC.
- a. Feasibility Evaluation Checklist administrator’s manual
  - b. Feasibility Evaluation Checklist Observation Blank
  - c. Feasibility Evaluation Checklist Self-Report Blank
  - d. Feasibility Evaluation Checklist Example
- 7) Functional Assessment Constructs Taxonomy - An early step in the Social Security Administration's Disability Determination Redesign Project was a survey of the constructs used to evaluate work disability in all of the disability determination systems in the United States and more than 60 industrialized countries. Several hundred constructs were identified and subjected to an expert judgment exercise involving disability and rehabilitation experts throughout the United States and Canada. This folder includes the FAC Taxonomy and the materials necessary to implement its use in a variety of tasks.
- a. Five domains, 33 conceptual factors, and 131 Functional Assessment Constructs are presented in two formats, a .pdf file that can be printed easily, and an Excel file that can be searched and modified.
  - b. Functional Assessment Constructs Taxonomy Examiner’s Manual
  - c. FAC Taxonomy Visual Aids
- 8) Functional Capacity Evaluation Marketing Slide Shows – Dr. Matheson has been a leader in the development of Functional Capacity Evaluation, especially in use by workers’ compensation insurance carriers in the United States and the various workers’ compensation systems in all of the provinces in

Canada. This folder contains PowerPoint slideshows that he has used to explain the process to insurance executives.

- a. Cal FCP Insurance Marketing PowerPoint Slide Show
- b. Pain Effort and Disability Determination PowerPoint Slide Show
- c. The Future of Functional Capacity Evaluation PowerPoint Slide Show
- d. Matheson Workers' Comp Rehab PowerPoint Slide Show

9) Mother Report Resources – Dr. Matheson continues to maintain a forensic rehabilitation practice, evaluating plaintiffs in lawsuits in terms of their work capacity, rehabilitation potential, and loss of earning capacity. To automate the report preparation process, he has developed a “mother report” format. This folder includes the files that are necessary to implement this process.

- a. ELC Automated Mother Report Female Blank
- b. ELC Automated Mother Report Male Blank
- c. ELC Mother Report Female Sample
- d. WCE Mother Report Blank
- e. Male WCE Mother Report
- f. Female WCE Mother Report
- g. PDC Chart
- h. PDC Chart Explanation

10) Multidimensional Task Ability profile (MTAP) Resources – Dr. Matheson has worked with Dr. Vert Mooney and his colleagues at the US Spine & Sports Foundation in San Diego, California to develop a new process to collect information about functional status that is optimally safe, reliable, valid, and practical. The result is the MTAP, a computerized performance integrated self-report measure. This folder contains PowerPoint presentations that introduced the MTAP and explain some of the design criteria as well as the use of Item Response Theory to develop and select items.

- a. MTAP Introduction
- b. Matheson Introduction to Rasch Analysis

- c. MTAP Work Injury Case Management
- d. MTAP Calibration of Work Activities
- e. MTAP Employer Return to Work Case Management

11) Normative Data Calculators and Profilers – Dr. Matheson maintains an active practice evaluating clients with work disabilities. He has developed several tests, test protocols, and automated the use of information available in the public domain for widely used tests. This folder contains several Excel spreadsheets that use macros to automate calculations and in some cases generate graphic representations of functional assessment data.

- a. Excel spreadsheet that automates calculation of EPIC Lift Capacity Test and gender-based normative data. Provides graphic display of results that can be copied and pasted from the Excel chart into a Word document.
- b. Excel spreadsheet that automates calculation of Spinal Function Sort gender-based normative data.
- c. Excel spreadsheet that automates calculation of Hand Function Sort gender-based normative data.
- d. Excel spreadsheet that automates calculation of hand strength normative data for males based on Jamar and B&L tests. Provides graphic display of results that can be copied and pasted from the Excel chart into a Word document.
- e. Excel spreadsheet that automates calculation of hand strength normative data for females based on Jamar and B&L tests. Provides graphic display of results that can be copied and pasted from the Excel chart into a Word document.
- f. Excel spreadsheet that automates calculation of the ELC actuarial analysis. Provides percent of normal lift capacity for each of the six ELC sub-tests.
- g. SFS Lower Extremity Profiler. Excel spreadsheet that automates calculation of Spinal Function Sort answers with a special emphasis on lower extremity function.
- h. SFS Profiler. Excel spreadsheet that automates calculation of Spinal Function Sort answers and provides graphic output.
- i. HFS Profiler. Excel spreadsheet that automates calculation of Hand Function Sort answers and provides graphic output.

12) Brain Injury Rehabilitation – Dr. Matheson has been involved with the assessment and rehabilitation of persons with brain injury since 1970. While at the Washington University School of Medicine Program in Occupational Therapy, he was the Director of the Work Disability laboratory and the Occupational Performance Center, where he and his colleagues developed the Structured Work Activity Groups (SWAG) approach to brain injury rehabilitation. More recently, he has developed the second generation of the SWAG in a suite of tasks implementing the Progressive Occupational Demand (POD) approach to higher-level brain injury rehabilitation. This folder includes PowerPoint slideshows that provide an introduction to both SWAG and POD. Materials to implement the SWAG and POD approach are available through EpicRehab.com.

- a. AOTA Work Special Interest Section Presentation PowerPoint Slide Show
- b. Matheson Introduction to SWAG PowerPoint Slide Show
- c. Matheson SCI, Work Disability and Hidden ABI PowerPoint Slide Show
- d. Matheson Missed Opportunities After ABI PowerPoint Slide Show
- e. POD Doll Chair Assembly Video
- f. POD Telephone Message Transcription and Database Editing Video

13) Symptom Magnification Syndrome Resources – Dr. Matheson first identified SMS while working with persons with chronic pain at Rancho Los Amigos Hospital in Downey California. At that time, Dr. Vert Mooney was the Director of the Problem Pain Service, the first rehabilitation program to address the enigma of disabling chronic musculoskeletal spinal pain. SMS was a valuable construct to approach pain behaviors from the standpoint of learning theory, to both understand the problem and provide effective intervention. This folder contains PowerPoint slideshows and other resource information that introduce SMS and provide recommendations for both evaluation and treatment. The emphasis is on rehabilitation, because many of these problems can be effectively treated.

- a. Effort Evaluation in Disability Assessment PowerPoint Slide Show
- b. Use of the BTE Work Simulator to Identify and Treat Symptom Magnification Syndrome
- c. Maximum Voluntary Testing for SMS
- d. Matheson Managing the Reluctant Worker PowerPoint Slide Show
- e. Matheson Post-Traumatic Growth PowerPoint Slide Show
- f. Matheson SMS for Employers

14) Work Capacity Evaluation Forms – Dr. Matheson invented Work Capacity Evaluation at Rancho Los Amigos Hospital as a method to determine the feasibility for competitive employment of persons with workers' compensation claims. This became a very successful model that was implemented in hundreds of programs throughout the United States and Canada. Most of the clinical forms that are needed to implement WCE are included in this folder, along with audio descriptions of the use of some of the most important.

- a. Daily Evaluation Schedule Form
- b. Evaluation Plan Form
- c. Goaling Process Procedures
- d. Goaling Process Example
- e. Information Release Form
- f. Pain and Sensation Drawing Forms
  - i. Whole Body
  - ii. Whole Body Pre-Post
  - iii. Upper Extremity
- g. Physical Demand Characteristics Chart (Highlighted Levels)
- h. Physical Demand Characteristics Chart (Master)
- i. Productivity Index Form
- j. Reported Functional Tolerances Form
- k. Social and Educational History Form
- l. Structured Intake Interview Form
- m. Whole Body Symptom Description Procedures
- n. Audio Files for three most used forms (3 .wav files = 18 minutes)

15) Work Hardening Introduction – Dr. Matheson invented Work Hardening in the 1970s at Rancho Los Amigos Hospital as a strategy for successfully rehabilitating people with chronic work disability,

especially those with chronic pain and acquired brain injury. This folder includes one of the original manuscripts describing work hardening in practice, along with a PowerPoint slide show that provides an introduction to Work Hardening.

- a. Work Hardening (1995) Chapter 15.
- b. Work Hardening PowerPoint slideshow
- c. Work Hardening Video #1 – “No Pain, No Gain”
- d. Work Hardening Video #2 - “Chronic Pain and Depression”

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