

APRIL 26-28, 2026

LEARNING | GROWING | ADVANCING | TOGETHER

2026

AAOHN NATIONAL CONFERENCE



ORLANDO, FLORIDA

ROSEN SHINGLE CREEK

2026

AAOHN NATIONAL CONFERENCE

Disclosures

Accreditation statement: The American Association of Occupational Health Nurses, Inc. (AAOHN) is accredited as a provider of nursing continuing professional development by the American Nurses Credentialing Center's Commission on Accreditation.

Contact hours: 1.0

Successful completion: complete the evaluation form for this session.

Disclosures: None of the planners or presenters for this activity have a relevant financial relationship to disclose with ineligible companies.



Mind the gaps: Closing loops in occupational health case management

Presented by:

Susan L. Zarzycki RN,COHN,CM

Bridget Zipp BSN,RN,COHN-S,CM

Melissa Johnson MSN,RN,CCM

TRAINING? I THOUGHT YOU SAID WING IT

Case managers are often thrown into the deep end without the foundational tools they need.

Common gaps include:

- **Motivational interviewing skills**
- **Trauma-informed approaches**
- **ADA/FMLA knowledge**
- **Understanding of disability laws** (FMLA, ADA, workers' comp—the whole alphabet soup)
- **Cultural competence**

Because case managers come from varied backgrounds—nursing, insurance, HR—not everyone starts with a full or consistent skill set.

How to Fix It:

Create a culture of continuous learning through **cross-training, ongoing CEUs, lunch-and-learn sessions, and learning from one another** to strengthen the team's collective toolbox.



KNOW YOUR PURPOSE



Foundation of Practice

Understanding your purpose is essential for effective occupational health nursing practice and decision-making.



Aligning with Goals

Clarity about your role ensures alignment with organizational objectives and patient care standards.



Balancing Responsibilities

Nurses balance facilitating recovery, managing costs, and complying with regulations effectively.



Managing Stakeholder Expectations

Knowing your purpose helps foster trust and collaboration among employers, insurers, and patients.



Purpose conflict: employer wants cost control; worker needs advocacy



UNDERSTANDING JURISDICTION

- **State-Specific Regulations**

Jurisdictional rules differ widely among states, making knowledge of local laws crucial for compliance and effective case management.

- **Key Disability Considerations**

Understanding temporary total and partial disability, along with related services, is vital for managing claims accurately.

- **Proactive Problem-Solving**

Knowledge of jurisdiction helps anticipate challenges in benefits and treatment disputes, enabling efficient case progress.

WORKPLACE FACTORS

- **Impact of Workplace Factors**

Attendance, tenure, and performance history influence recovery and return-to-work strategies effectively.

- **Collaboration Among Colleagues**

Nurses collaborating with colleagues gather critical information to identify case red flags efficiently.

- **Supporting Recovery Environment**

Fostering support and open communication addresses barriers like job dissatisfaction and interpersonal conflicts.



4-2 © LaughingStock International Inc. Dist. by Universal UClick for UFS. 2013

“The doctor said to sleep on your stomach tonight and he’ll see you in the morning.”

MANAGING PROVIDERS

- **Close Provider Relationships**

Maintaining strong connections with medical providers ensures timely and appropriate patient care.

- **Challenging Unnecessary Decisions**

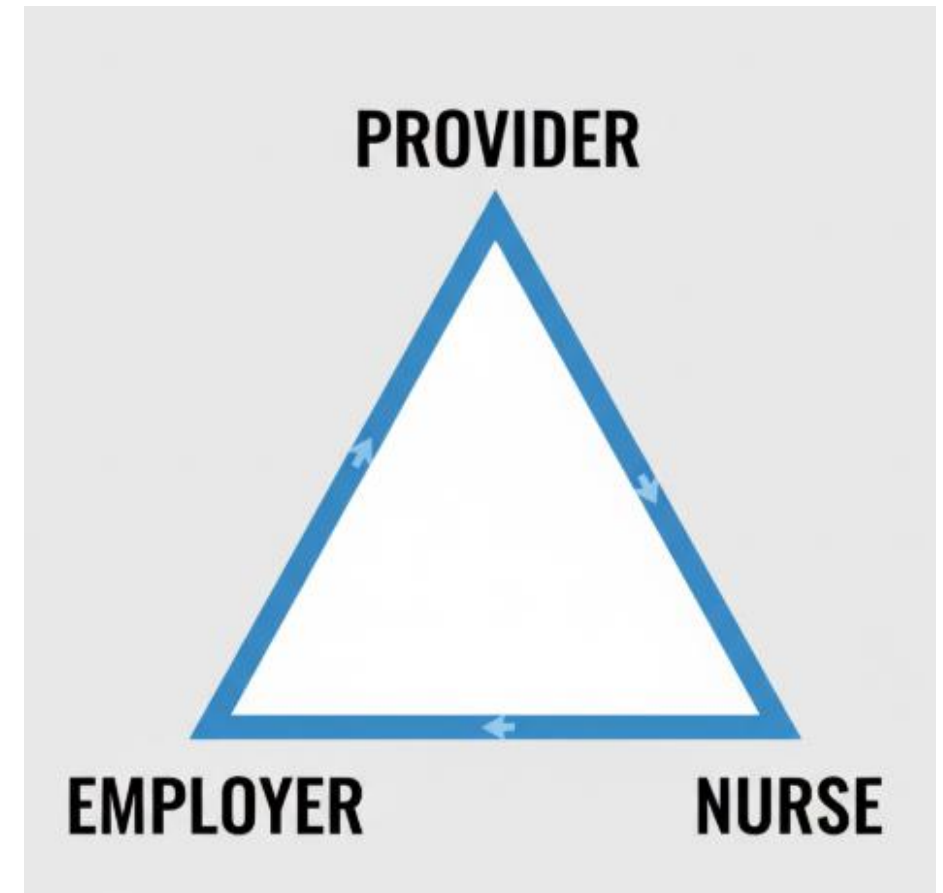
Nurses should question unnecessary out-of-work decisions to avoid treatment delays and reduce costs. It is essential that office visit transcriptions are read thoroughly. Look for “copy and paste” reporting. Errors can be identified that could result in under or over treating.

- **Efficient Communication Portals**

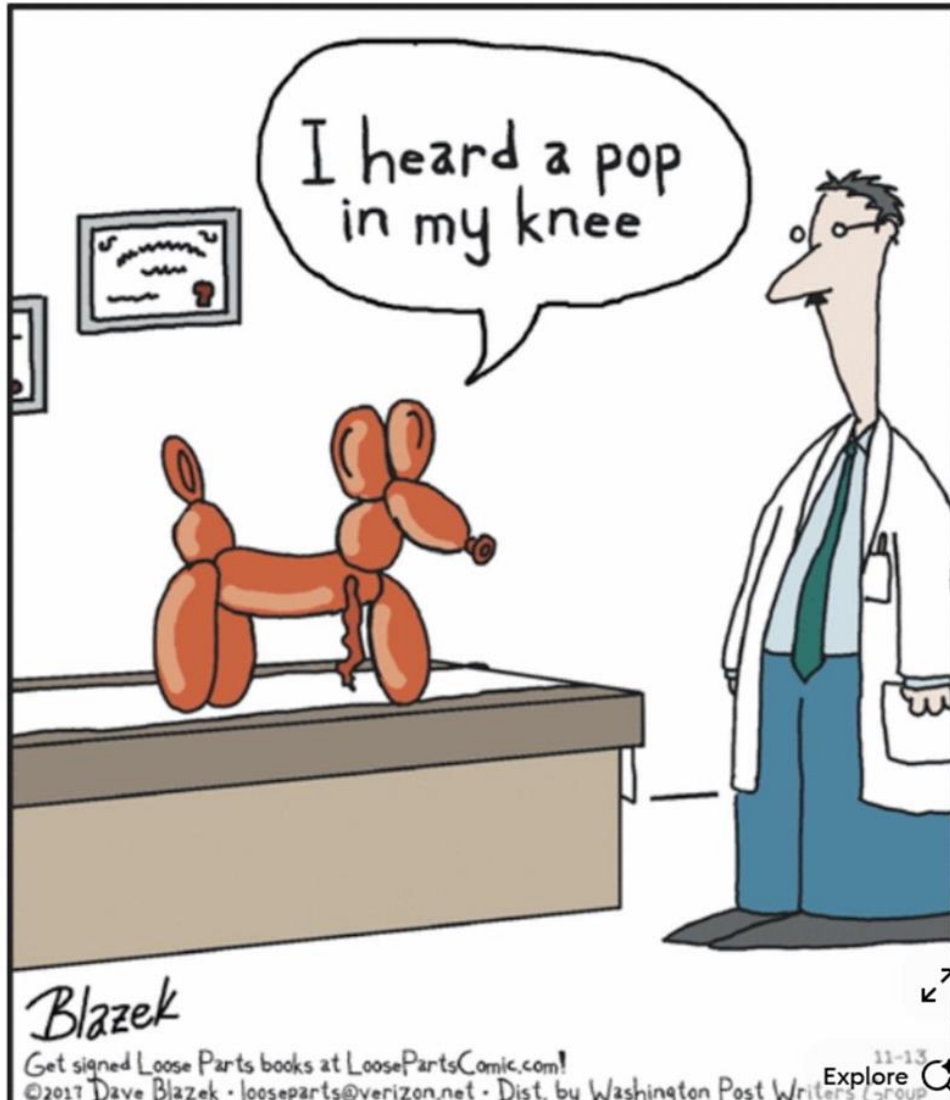
Ensuring effective communication systems supports faster recovery and coordinated care planning. Provider portals can have system faults, inaccurate contact information or delays in medical reports being released due to providers not signing off on charts

- **Collaborative Care Planning**

Fostering collaboration between providers, employers, and insurers aligns care with health and organizational goals.



INSURANCE CONSIDERATIONS



- **What Third Party Administrators Actually do:**
- TPA's job is to manage all aspects of your workers' compensation claim, from initial reporting to claims processing to the final settlement.
- They also ensure that the employee receives the appropriate medical treatment and that you comply with all applicable workers' comp laws and regulations.
- TPAs are responsible for processing workers' comp claims and handling other related services, like managing employee benefits, claim settlements, and medical bill negotiations.

ADJUSTERS AND DOCUMENTATION

- **Understanding Insurance Coverage**

Nurses need to comprehend insurance types and their limits to influence effective care decisions.

- **Importance of Timely Authorization**

Familiarity with insurance policies helps prevent delays by ensuring treatments are authorized on time.

- **Accurate Documentation for Reimbursement**

Proper documentation ensures compliance and facilitates payment, reducing claim denials.

- **Streamlining Workflows**

Understanding insurance protocols helps nurses streamline processes and support timely patient recovery.

Adjuster turnover = Communication gaps

LEADERSHIP REPORTING

- **Importance of Leadership Reporting**

Regular reporting to leadership ensures transparency and accountability in healthcare processes.

- **Role of Nurses in Reporting**

Nurses share progress updates, identify challenges, and advocate for resources needed.

- **Weekly Reporting Framework**

Weekly reports include acceptance, monitoring, advocacy, discussion, and case closure details.

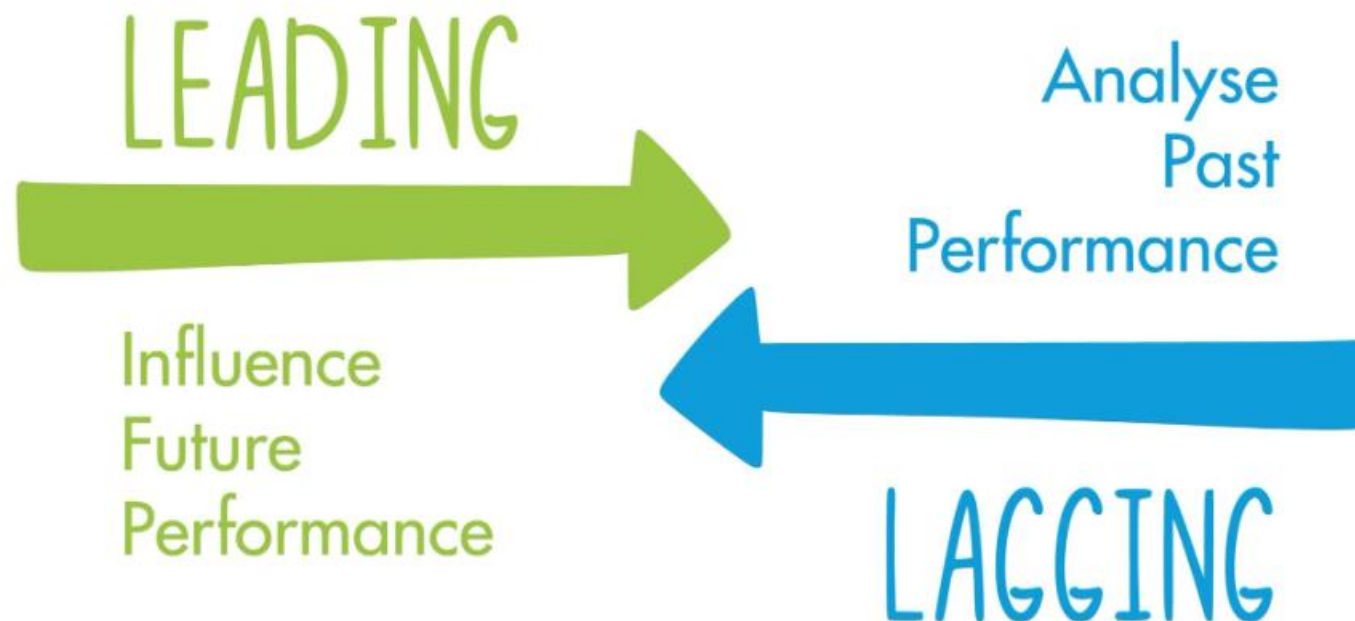
- **Maintaining Organizational Alignment**

Consistent reporting keeps stakeholders informed and engaged in the recovery process.

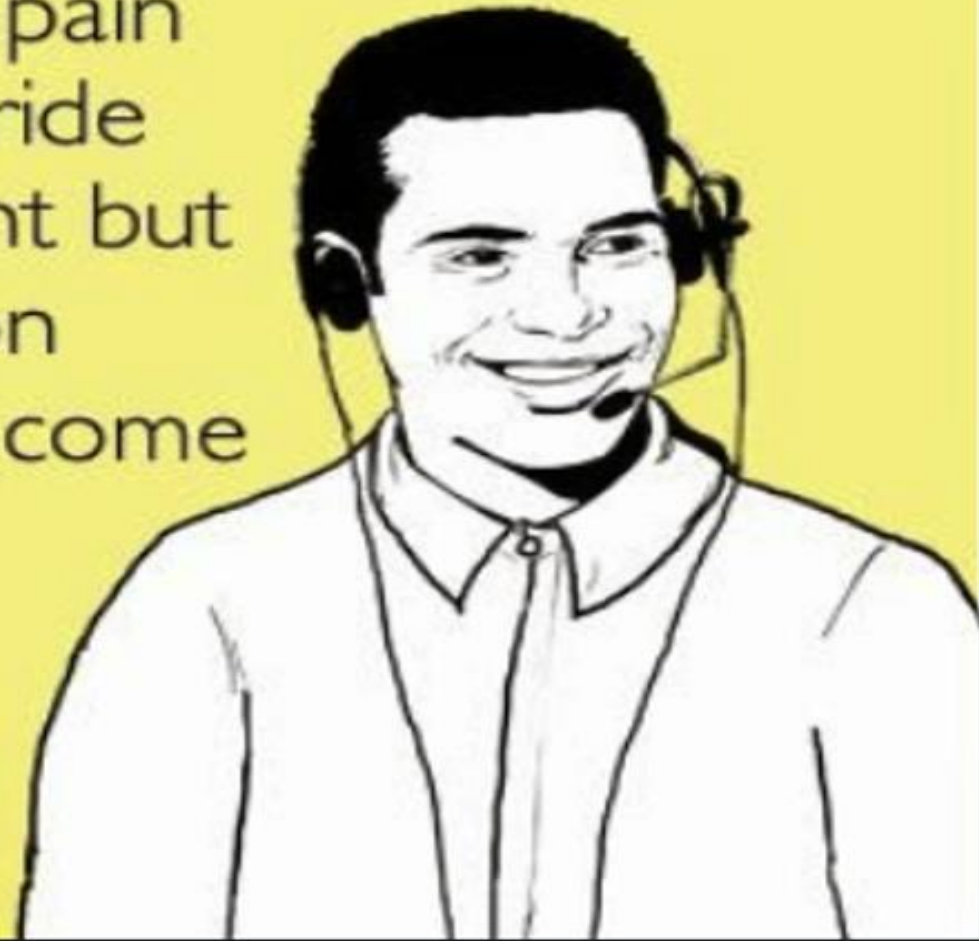


KNOW YOUR SAFETY CULTURE

- A strong safety culture prevents workplace injuries and enhances employee well-being.
- Nurses should focus on hazard analysis, prevention, and OSHA compliance to reduce incidents. Be knowledgeable of leading and lagging indicators.
- Educating employees and collaborating with management supports safer work environments.



So, you are still in pain
and don't have a ride
for an appointment but
you want a refill on
percocet and can come
pick up the script
now?



som^{ee}cards
user card

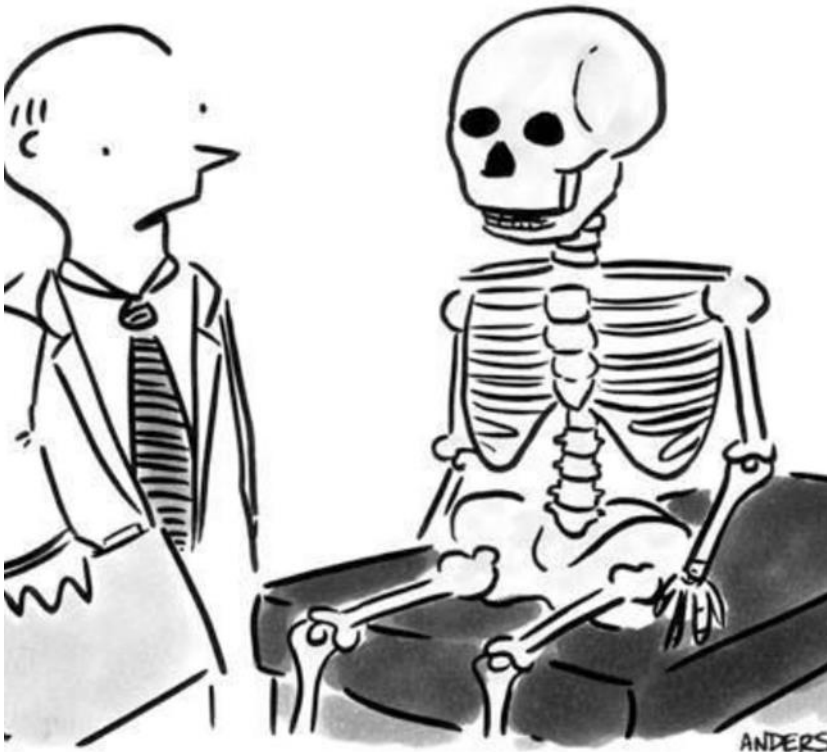
EMPLOYEE TRUST? MISSING IN ACTION

- Impact of workplace factors: attendance, tenure and performance history influence recovery and return to work strategies
- Nurses collaborating with colleagues help workers feel supported and not watched. Case managers are supposed to be a neutral liaison, but many employees see them as “the company’s spy.”
- Advocacy often feels performative unless the manager actively builds trust.
- Fostering support and open communication addressed barriers like job dissatisfaction and interpersonal conflicts

“I never know what’s happening with my claim”



THE REALITY OF COMMUNICATION BREAKDOWNS



"Still, let's do an x-ray just to be sure."

- **Communication Breakdown Between stakeholders** – Employees, supervisors, HR, providers, insurers... everyone's playing telephone, and messages get lost or totally twisted.
- **With the worker** – Sometimes the injured employee is the *last* to know what's going on with their own case.

ONE-SIZE-FITS
NONE
APPROACH

COOKIE
CUTTER RTW
PLANS



RTW PLANS NOT INDIVIDUALIZED

“Just come back with modified duty” is *not* a return-to-work plan.

Return-to-work programs often fall short when they lack:

- **Creativity and collaboration**

- (e.g., no coordination with supervisors or workplace departments)

- **Consideration of mental health needs**

- *Physical clearance doesn't automatically mean an employee is ready to return.*

- **Holistic assessment**

- Mental and emotional recovery after injury is frequently overlooked.

IMPLEMENTING TRANSITIONAL DUTY

Purpose of Transitional Duty

Programs assist employees in returning to work in modified roles during injury recovery to maintain engagement and productivity.

Monitoring and Tracking

Nurses monitor assignment duration and track work status after medical visits to assess recovery progress effectively.

Benefits of Program

Effective transitional duty reduces costs, boosts employee morale, and facilitates faster workforce reintegration.

Fix: Use functional capacity evals, involve the employee in the planning

MANAGING LEAVE PROCESSES

- **Compliance with Regulations**

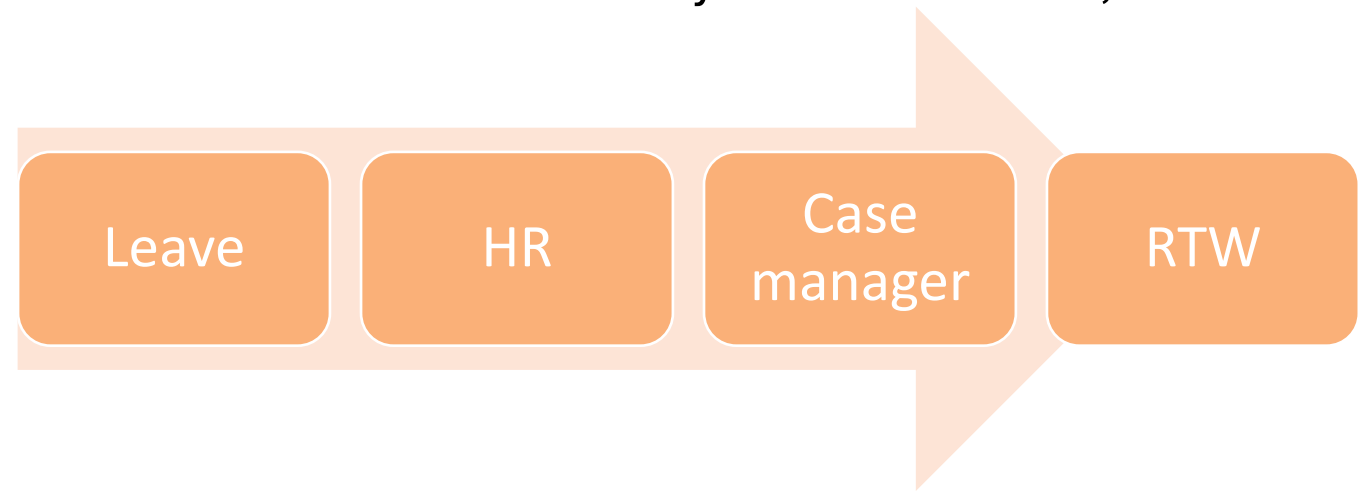
Managing leave processes requires adherence to FMLA and workers' compensation laws to ensure legal compliance and employee rights.

- **Tracking and Monitoring Leave**

Effective leave management involves tracking overlapping leaves and monitoring maximum out-of-work durations for accuracy.

- **Clear Communication**

Consult with your HR partner to ensure documents are submitted in a timely manner for ADA , FMLA or STD benefits.



EXPENSE-REDUCTION TACTICS

- **Active Claims Management**

Managing open claims actively helps in controlling costs and ensuring timely case progression.

- **Directed Care Utilization**

Directing care where permitted optimizes resource allocation and reduces unnecessary expenses. Consult with your adjuster with any questions regarding jurisdiction

- **Role of Nurses in Cost Control**

Nurses identify inefficiencies and implement strategies to advance cases and reduce costs. Physical Therapy and or chiropractic care without improvements.

- **Timely Interventions**

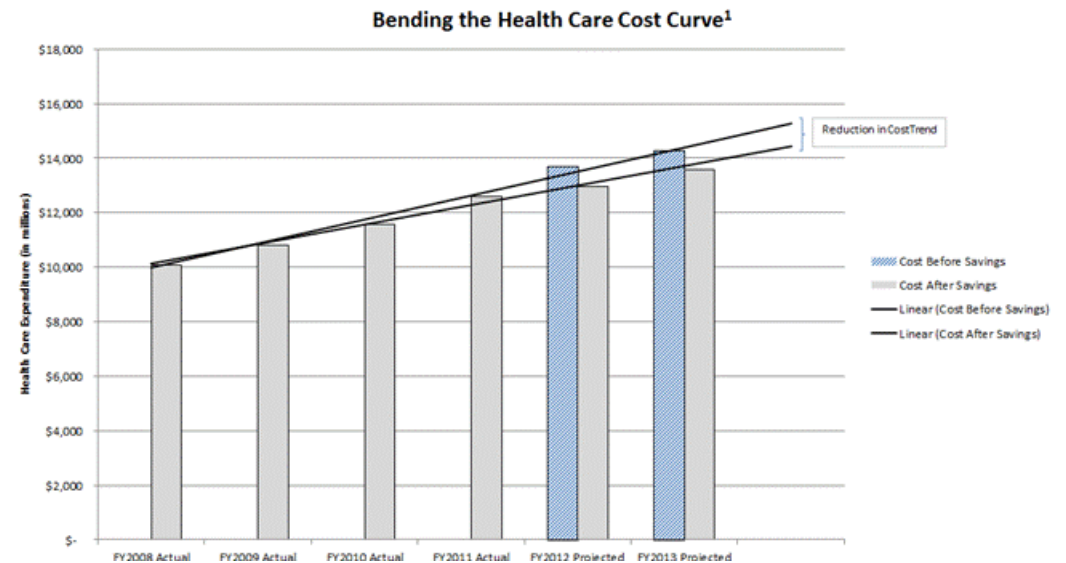
Focusing on timely interventions eliminates unnecessary expenses and maintains quality care.

* Directed care - only where jurisdictionally permissible

TOO MUCH FOCUS ON COST, NOT ENOUGH ON CARE

- Yes, managing costs is important, but if it's all about saving money and pushing quick RTW, it can backfire:
 - Incomplete healing
 - Reinjury
 - Loss of trust from employees
- Pressure to save money → rushed RTW, poor outcomes
- Long-term costs skyrocket

Fix: Invest early in quality care = better long-term savings



“It’s not just about managing cases. It’s about managing care, trust, and healing. Let’s do better—because our people deserve it.”

REFERENCES

Bischof, G., Bischof, A., & Rumpf, H. J. (2021). Motivational interviewing: An evidence-based approach for use in medical practice. *Dtsch Arztebl International*, 118(7), 109–115.

Jetha, A., Le Pouésard, M., Mustard, C., Backman, C., & Gignac, M. A. M. (2021). Getting the message right: Evidence-based insights to improve organizational return-to-work communication practices. *Journal of Occupational Rehabilitation*, 31(3), 652–663.

Schulte, P. A., Cunningham, T. R., Guerin, R. J., Hennigan, B., & Jacklitsch, B. (2018). Components of an occupational safety and health communication research strategy for small- and medium-sized enterprises. *Annals of Work Exposures and Health*, 62(Suppl 1), S12–S24.

Bernardo, W. M. (2023). Evidence-based occupational health. *Revista Brasileira de Medicina do Trabalho*, 21(2), e2023212.

O’Daniel, M., & Rosenstein, A. H. (2008). Professional communication and team collaboration. In R. G. Hughes (Ed.), *Patient safety and quality: An evidence-based handbook for nurses* (Chap. 33). Agency for Healthcare Research and Quality.

González-Caballero, J. (2024). Occupational health nursing: Realities and challenges. *International Nursing Review*, 71(3), 513–520.

American Association of Occupational Health Nurses. (2020). Health promotion and productivity in the workplace: The occupational and environmental health nurse role in supporting the workforce using NIOSH’s Total Worker Health[®] approach. *Workplace Health & Safety*, 69(2), 93–95.

AAOHN & AAOHN Academy. (2022). *Fundamentals of occupational and environmental health nursing: AAOHN core curriculum* (5th ed.). AAOHN.

Rogers, B., et al. (2009). *Occupational health nursing guidelines for primary clinical conditions* (4th ed.). OEM Press.