

## Mandatory Medical Clearances

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### Overview and purpose

Before an employee may begin the duties of a civil service position, certain conditions of employment must be met. One of these is a requirement for medical clearance. There are three types of medical clearance:

- Essential Functions Health Questionnaire STD 910
- Health Questionnaire (with Physician's Report) STD 610
- Functional Ability Health Questionnaire (SPB 2066)

The purpose of this section is to outline the procedures for obtaining medical clearance.

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### Policy

It is the policy of the State Personnel Board (SPB) that employability of persons in state civil service be based on individual consideration of the applicant to safely and efficiently perform the essential functions of the applied for position.

Failure to appoint an applicant for medical reasons should only take place when:

- a medical condition will prevent the applicant from safely and efficiently performing the essential duties of the vacant position and the hiring department is unable to provide reasonable accommodation
  - the essential duties or working conditions will, based on medical opinion, significantly and imminently endanger the health or safety of the employee, co-workers, or the public
  - no reasonable accommodation is available
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### Topics

The following table identifies the topics covered in this section.

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## Essential Functions Health Questionnaire (STD 910) Process

**Overview**

The Essential Functions (EF) Health Questionnaire (HQ) STD 910 is the document presented to the prospective employee, along with the EF duty statement, when a **firm** job offer is made. Completion of the STD 910 is **mandatory** for **all** positions being filled.

**Roles and responsibilities**

The following table depicts the roles and responsibilities in the EF HQ process:

Role	Responsibility	Result
Personnel Liaison(PL)/ Attendance Clerk(AC)	<ul style="list-style-type: none"> <li>• Insert appropriate information as required on STD 910</li> <li>• Attach EF Duty Statement</li> <li>• Forward both documents to hiring supervisor</li> <li>• Review for completeness following firm job offer acceptance</li> <li>• Forward both documents to Reasonable Accommodation Coordinator (RAC), if indicated</li> <li>• Forward all hiring documents to Personnel Specialist (PS)</li> <li>• Retain all hiring interview documents</li> <li>• Make copies of EF duty statement</li> </ul>	
Hiring Supervisor	<ul style="list-style-type: none"> <li>• <b>Does not</b> provide STD 910 during interviews</li> <li>• Conduct an interactive process when firm job offer made and review the EF duty statement, if accommodation is indicated</li> <li>• <b>Does not</b> determine reasonable accommodation, if indicated</li> <li>• May work with RAC/employee regarding reasonable accommodation</li> <li>• May rescind job offer if prospective employee refuses to sign</li> <li>• Has prospective employee sign</li> <li>• S/he signs</li> <li>• Forward signed and completed STD 910 and EF Duty Statement to PL/AC</li> <li>• <b>Prospective employee CANNOT start work until STD 910 has been reviewed by PL</b></li> </ul>	EE not hired, proceed to next "best qualified" candidate

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**Essential Functions Health Questionnaire (STD 910) Process,**  
(continued)

**Roles and responsibilities**  
 (continued)

<b>Role</b>	<b>Responsibility</b>	<b>Result</b>
Personnel Specialist (PS)	<ul style="list-style-type: none"> <li>• Process appointment</li> <li>• Forward documents to CRU for filing</li> </ul>	PAR keyed
Customer Resource Unit (CRU)	<ul style="list-style-type: none"> <li>• Separate STD 910, with attached EF Duty Statement, from hiring documents and file accordingly</li> </ul>	Compliance with Privacy Act
Reasonable Accommodation Coordinator (RAC)	<ul style="list-style-type: none"> <li>• Work with the employee and if necessary, the hiring supervisor and Medical Officer at the State Personnel Board (SPB)</li> <li>• Approve and implement or deny reasonable accommodation</li> <li>• Return STD 910 to PL/AC for processing with hiring documents to PS; if job offer rescinded, retain documents for two years following final interview</li> </ul>	EE reasonably accommodated or job offer rescinded
Prospective employee (EE)	<ul style="list-style-type: none"> <li>• Understand EF duty statement, and STD 910</li> <li>• Disclose need for reasonable accommodation</li> <li>• Sign and return forms to the PL</li> </ul>	EE begins work following PS review of HQ and notification to PL/AC

*Continued on next page*

## **Essential Functions Health Questionnaire (STD 910) Process**

(continued)

**When STD 910 required**

The hiring supervisor **MUST** engage in an interactive discussion with the prospective employee regarding the EF duty statement and STD 910 for all of the following personnel transactions when there is a **change in duties or work environment**:

<b>Required when</b>	<b>Not required when</b>
Transfer with change in duties or different classification	Appointment from subdivisional or departmental reemployment list
Non-promotional out-of-class assignment	Mandatory reinstatement occurs except in cases of medical termination, which must be approved by the SPB Medical Officer
Non-promotional Training and Development (T&D) assignment	Public Employee Retirement System (PERS) has given medical clearance for permissive reinstatement to a class in the same occupational group (see Pay Scale Schematic Section) after a disability retirement
Temporary Authorization Utilization (TAU)	
New hire to state service	
Reasonable accommodation (requested/needed)	
Permissive Reinstatement	
Industrial limited duty	
Non-industrial limited duty	
Retired annuitant, if separated more than two years or with a change in duties from prior position	Less than two year separation or returning to former position

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## Essential Functions Health Questionnaire (STD 910) Procedure

### How to complete and process the STD 910

Follow the steps in the table below to complete the STD 910.

Step	Action
1	On the STD 910 the <b>PL/AC</b> : <ul style="list-style-type: none"> <li>• Inserts applicant information</li> <li>• Inserts contact information (the name of the PL)</li> <li>• Inserts "see attached duty statement" in List of Essential Functions section</li> <li>• Inserts "Duties approved per RPA # _____ on dd/mm/yy" in the "Personnel Officer's Name" block</li> <li>• Attaches EF Duty Statement</li> <li>• Forwards documents to hiring supervisor</li> </ul>
2	The <b>hiring supervisor</b> makes a job offer and engages in an interactive process, if indicated: <ul style="list-style-type: none"> <li>• Has the EE read and/or understand<sup>1</sup> the EF duty statement</li> <li>• Has the EE read and/or understand the STD 910</li> <li>• Has the EE complete and sign all documents</li> </ul>
3	If the <b>first</b> box on the second page of the STD 910 is checked, the hiring supervisor: <ul style="list-style-type: none"> <li>• Determines a tentative start date with the EE</li> <li>• Has EE sign all documents</li> <li>• Signs all documents</li> <li>• Forwards all documents to the PL/AC for processing</li> </ul>
4	If the <b>third</b> box on the second page of the STD 910 is checked, the hiring supervisor: <ul style="list-style-type: none"> <li>• Rescinds the job offer</li> <li>• Thanks the EE for his/her time</li> <li>• Forwards all documents to the PL/AC for retention with all of the hiring interview documents for a period of 2 years from the date of the last interview</li> <li>• Makes firm job offer to next "best qualified" applicant</li> </ul>

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<sup>1</sup> The term "understand" may require the employee to provide an interpreter (friend or family member) at the time of the firm job offer, if the prospective employee does not speak English, is not fluent in English, is hearing impaired or visually impaired. The hiring supervisor must inform the prospective employee to have an interpreter accompany him/her to the job offer discussion.

**Essential Functions Health Questionnaire (STD 910) Procedure,**  
Continued

**How to  
 complete  
 and process  
 the STD 910**  
 (continued)

<b>Step</b>	<b>Action</b>
5	If the <b>second or fourth</b> box on the second page of the STD 910 is checked, the hiring supervisor: <ul style="list-style-type: none"> <li>• Opens dialogue with the EE to ascertain what limitations s/he may have or what equipment, work schedule, etc. is needed</li> <li>• Takes detailed notes regarding the conversation</li> <li>• <b>Does not</b> determine the type of accommodation</li> <li>• Informs EE that the RAC will contact him/her to discuss reasonable accommodation and ends the job offer discussion</li> <li>• Has the EE sign all documents</li> <li>• Signs all documents</li> <li>• Forwards all documents to PL/AC for routing to RAC</li> </ul>
6	If a reasonable accommodation is requested, the RAC works with the employee, hiring supervisor and/or SPB Medical Officer: <ul style="list-style-type: none"> <li>• To determine the appropriate reasonable accommodation</li> <li>• Notifies the C&amp;P Analyst of any change in duties or working conditions to ensure appropriate allocation</li> </ul>
7	If a reasonable accommodation is approved, the RAC: <ul style="list-style-type: none"> <li>• Implements the accommodation</li> <li>• Approves the STD 910</li> <li>• Forwards the approved STD 910 and supporting documentation to the PL/AC</li> </ul>
8	The PL/AC informs the hiring supervisor of the STD 910 approval
9	The hiring supervisor notifies the employee to start work
10	The PL/AC forwards all hiring documents to the PS, and makes <b>three</b> copies of the <b>EF Duty Statement and/or revision</b> , if applicable <ul style="list-style-type: none"> <li>• One for the hiring supervisor's work file for use in performance appraisals, training, or possible constructive intervention</li> <li>• One for the employee</li> <li>• One for the employee's Official Personnel Folder (OPF)</li> <li>• <b>Copies of the STD 910 are not to be retained.</b> The original, sent with the hiring documents to the PS, is retained in a separate, confidential medical file</li> </ul>

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## Essential Functions Health Questionnaire (STD 910) Procedure, Continued

**How to  
complete  
and process  
the STD 910**  
(continued)

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<b>Step</b>	<b>Action</b>
11	The PS processes the appointment
12	The EE starts work and completes remaining appointment paperwork

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**Considerations** Acknowledging that some hiring interviews are not held in the location of the position, the hiring supervisor may:

- Telephone the prospective employee regarding the firm job offer,
- Inform the prospective employee regarding the purpose of the STD 910 noting the HQ and the EF duty statement must be signed,
- Read the EF duty statement to the prospective employee and then ask him/her to respond to one of the four boxes on the STD 910, and
- The EF duty statement and STD 910 **shall** be faxed or mailed to the employee for signature and return. **All** documents must be signed and returned **within seven calendar days from the postmark date or the date the fax was sent to be received prior to the employee's start date.** The hiring supervisor must provide his/her fax number and/or a pre-addressed return envelope.

**Warning!**

**A prospective employee CANNOT start work until the STD 910 has been signed and/or approved by the PL, SPB Medical Officer and/or Reasonable Accommodation Coordinator (RAC), if Subject to Proper Placement (STPP) has been indicated by SPB Medical Officer!**

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## Health Questionnaire (with Physician's Report) STD 610 Process

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### **Purpose**

The Health Questionnaire (HQ) with Physician's Report STD 610 is the document presented to the prospective employee, along with the EF duty statement **and** an Essential Functions Health Questionnaire (STD 910) when a **firm** job offer is made for positions that require:

- Specific physical requirements as part of the classification specification where examination is needed to determine ability to perform essential duties or need for accommodation
- Require one of the following duties or conditions of employment:
  - a. operation of heavy motorized vehicles/equipment or vehicles engaged in transportation of passengers (this does not include driving incidental to performance of State business)
  - b. responsibility for custody, control or direct contact with incarcerated or institutionalized individuals
  - c. continuously rotating or back-to-back shift assignments (working on more than one shift without a 15-hour rest period) or extended work shifts
  - d. performance of tasks at unsafe distance from the ground with or without safety apparatus (e.g., poles, scaffolds, tree tops, bridge suspensions, etc.) or near heavy or fast moving machinery or traffic
  - e. repetitive lifting or carrying 25 pounds or more
  - f. any other functional or environmental factor of high physical, psychological or environmental demand as determined by the hiring authority and the SPB Medical Officer.

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**Health Questionnaire (with Physician’s Report) STD 610**  
**Process, Continued**

**Roles and responsibilities** The following table depicts the roles and responsibilities in the STD 610 process.

Role	Responsibility
Personnel Liaison (PL)/Attendance Clerk (AC)	<ul style="list-style-type: none"> <li>• Verify classification requires STD 610 (see Attachment 1 for list of classifications)</li> <li>• Insert appropriate information on the upper portion of pages 1 and 3 of the STD 610</li> <li>• Attach EF Duty Statement</li> <li>• Set up medical appointment</li> <li>• Upon completion and return of STD 610 by selected candidate               <ul style="list-style-type: none"> <li>✓ review questionnaire and ensure that all questions have been completed</li> <li>✓ <b>make a copy of STD 610 and forward to PS for medical file</b></li> <li>✓ <b>submit STD 610 with EF Duty Statement to SPB Medical Officer</b></li> <li>✓ <b>notify PS that STD 610 has been submitted for review by SPB Medical Officer and to notify PL and C&amp;P Analyst when approval/denial/STPP received</b></li> <li>✓ call PS for status on STD 610 approval from SPB, <b>IF</b> more than 10 working days has elapsed</li> </ul> </li> </ul> <p><b>NOTE: if lifting, bending, stooping, etc. is a required repetitive physical requirement of the job, the Program may determine whether or not to request the physician complete the “lift test” and attach it to the STD 610/2066 upon return; SPB does not return STD 610 to PS; however, the STPP is returned to the PS. Once the Program determines a lift test is necessary, it will be standard for <b>all positions in the classification in that Program.</b> A lift test may be necessary at some point in the process to clarify “subject to proper placement” situations, if placement is difficult to accommodate. It should be noted that lift tests incur an additional cost over and above the standard medical examination.</b></p>

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**Health Questionnaire (with Physician’s Report) STD 610**  
**Process, Continued**

**Roles and responsibilities**  
 (continued)

Role	Responsibility						
Hiring Supervisor	<ul style="list-style-type: none"> <li>• <b>Does not</b> provide STD 610 during interviews</li> <li>• Conducts an interactive process when firm job offer made including review of the EF duty statement and explanation of the STD 610 and STD 910 requirement</li> </ul> <table border="1" data-bbox="509 737 1507 1304"> <thead> <tr> <th data-bbox="509 737 776 777">If</th> <th data-bbox="776 737 1507 777">Then</th> </tr> </thead> <tbody> <tr> <td data-bbox="509 777 776 1230">Second or fourth box on the second page of the STD 910 is checked</td> <td data-bbox="776 777 1507 1230">           The hiring supervisor:           <ul style="list-style-type: none"> <li>• Opens dialogue with the EE to ascertain what limitations s/he may have or what equipment, work schedule, etc. is needed</li> <li>• Takes detailed notes regarding conversation</li> <li>• <b>Does not</b> determine the type of accommodation</li> <li>• Informs EE that the RAC will contact him/her to discuss reasonable accommodation and ends the job offer discussion</li> <li>• Has the EE sign all documents</li> <li>• Signs all documents</li> <li>• Forwards all but STD 610 documents to PL/AC</li> </ul> </td> </tr> <tr> <td data-bbox="509 1230 776 1304">Accommodation indicated</td> <td data-bbox="776 1230 1507 1304">Follow steps 6-12 on page 80.5 and 80.6 for the STD 910</td> </tr> </tbody> </table> <ul style="list-style-type: none"> <li>• Has prospective employee sign all documents</li> <li>• S/he signs EF duty statement</li> <li>• Forward all other hiring documents to PL/AC for retention until approval of completed STD 610</li> <li>• <b>Prospective employee CANNOT start work until STD 610 has been approved by the SPB Medical Officer!</b></li> </ul>	If	Then	Second or fourth box on the second page of the STD 910 is checked	The hiring supervisor: <ul style="list-style-type: none"> <li>• Opens dialogue with the EE to ascertain what limitations s/he may have or what equipment, work schedule, etc. is needed</li> <li>• Takes detailed notes regarding conversation</li> <li>• <b>Does not</b> determine the type of accommodation</li> <li>• Informs EE that the RAC will contact him/her to discuss reasonable accommodation and ends the job offer discussion</li> <li>• Has the EE sign all documents</li> <li>• Signs all documents</li> <li>• Forwards all but STD 610 documents to PL/AC</li> </ul>	Accommodation indicated	Follow steps 6-12 on page 80.5 and 80.6 for the STD 910
If	Then						
Second or fourth box on the second page of the STD 910 is checked	The hiring supervisor: <ul style="list-style-type: none"> <li>• Opens dialogue with the EE to ascertain what limitations s/he may have or what equipment, work schedule, etc. is needed</li> <li>• Takes detailed notes regarding conversation</li> <li>• <b>Does not</b> determine the type of accommodation</li> <li>• Informs EE that the RAC will contact him/her to discuss reasonable accommodation and ends the job offer discussion</li> <li>• Has the EE sign all documents</li> <li>• Signs all documents</li> <li>• Forwards all but STD 610 documents to PL/AC</li> </ul>						
Accommodation indicated	Follow steps 6-12 on page 80.5 and 80.6 for the STD 910						
Personnel Specialist (PS)	<ul style="list-style-type: none"> <li>• Calls SPB Medical Officer if requested by PL</li> <li>• Processes appointment</li> <li>• Forwards hiring documents to CRU for filing</li> <li>• Submits STD 610 to CRU for filing in employees “green” medical file</li> </ul>						

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## Health Questionnaire (with Physician's Report) STD 610 Process, Continued

**Roles and responsibilities**  
 (continued)

Role	Responsibility				
Customer Resource Unit (CRU)	<ul style="list-style-type: none"> <li>Separate STD 610 and STD 910, with attached EF Duty Statement from hiring documents and file accordingly</li> </ul>				
Reasonable Accommodation Coordinator (RAC)	<ul style="list-style-type: none"> <li>Work with the employee and if necessary, the hiring supervisor and Medical Officer at the State Personnel Board (SPB)               <table border="1" data-bbox="532 764 1500 877" style="margin-left: 40px;"> <thead> <tr> <th data-bbox="532 764 1024 800">If</th> <th data-bbox="1024 764 1500 800">Then</th> </tr> </thead> <tbody> <tr> <td data-bbox="532 800 1024 877">STPP indicated and contacted by the C&amp;P Analyst</td> <td data-bbox="1024 800 1500 877">May implement or deny reasonable accommodation</td> </tr> </tbody> </table> </li> <li>Notifies the PL/AC of approval and/or limitations</li> </ul>	If	Then	STPP indicated and contacted by the C&P Analyst	May implement or deny reasonable accommodation
If	Then				
STPP indicated and contacted by the C&P Analyst	May implement or deny reasonable accommodation				
Prospective employee	<ul style="list-style-type: none"> <li>Understand EF duty statement, STD 610, and STD 910</li> <li>Complete the remainder of page 1 and the top half of page 2 of the STD 610 and on the STD 910 marks the appropriate box and signs</li> <li>Obtain medical examination in reasonable amount of time (generally, no more than three weeks) having the physician complete his/her portion of the STD 610</li> <li>Sign and return forms to hiring supervisor/PL</li> <li>If unable to obtain within 30 days of job offer, job offer can be rescinded</li> </ul>				

*Continued on next page*

## Health Questionnaire (with Physician's Report) STD 610 Process, Continued

**When STD 610 required** The hiring supervisor **MUST** engage in an interactive discussion with the prospective employee regarding the EF duty statement and STD 610 for classifications as described under 'Purpose' and/or identified on "Attachment 1" and are a:

- New hire to state service
- Transfer if from a classification which did not require a STD 610
- Non-promotional out-of-class assignment
- Non-promotional training-and-development assignment
- Temporary Authorization Utilization (TAU) if from a classification which did not require a STD 610 and is a current State employee
- Reasonable accommodation
- Industrial limited duty
- Non-industrial limited duty
- Permissive reinstatement
- Retired annuitant, if separated more than two years or with a change in duties from prior position

**Note:** An SPB 2066 (Functional Ability Health Questionnaire) may be used as an alternative to the STD 610:

**How to complete and process an approved STD 610** Follow the steps in the table below to complete and process the STD 610.

Step	Action
1	On the STD 610 the <b>PL/AC</b> , on page 1 and 3, inserts: <ul style="list-style-type: none"> <li>• Date job offer made</li> <li>• Applicant name</li> <li>• Applicant address</li> <li>• Class title and position number of vacancy</li> <li>• Hiring agency name</li> <li>• Agency address</li> <li>• Hiring manager's name and telephone number</li> <li>• Appointment type</li> <li>• Desired appointment date</li> <li>• Certification number, if applicable</li> <li>• Applicant's current occupation</li> <li>• Attaches EF duty statement</li> <li>• Forwards documents to hiring supervisor</li> </ul>

Continued on next page 80.11

## Health Questionnaire (with Physician's Report) STD 610 Procedure, Continued

**How to  
 complete  
 and process  
 an approved  
 STD 610**  
 (continued)

Step	Action						
2	<p>The <b>hiring supervisor</b> makes a job offer and engages in an interactive process and has the prospective employee (EE):</p> <ul style="list-style-type: none"> <li>• Read and/or understand<sup>2</sup> the EF duty statement</li> <li>• Read and/or understand the STD 610</li> </ul> <table border="1" data-bbox="375 823 1508 1423"> <thead> <tr> <th data-bbox="375 823 630 854">If</th> <th data-bbox="638 823 1508 854">Then</th> </tr> </thead> <tbody> <tr> <td data-bbox="375 865 630 1350">Second or fourth box on the second page of the STD 910 is checked</td> <td data-bbox="638 865 1508 1350"> <p>The hiring supervisor:</p> <ul style="list-style-type: none"> <li>• Opens dialogue with the EE to ascertain what limitations s/he may have or what equipment, work schedule, etc. is needed</li> <li>• Takes detailed notes regarding conversation</li> <li>• <b>Does not</b> determine the type of accommodation</li> <li>• Informs EE that the RAC will contact him/her to discuss reasonable accommodation and ends the job offer discussion</li> <li>• Has the EE sign all documents</li> <li>• Signs all documents</li> <li>• Forwards all but STD 610 documents to PL/AC for routing to RAC</li> </ul> </td> </tr> <tr> <td data-bbox="375 1360 630 1423">Accommodation indicated</td> <td data-bbox="638 1360 1508 1423">Follow steps 6 - 8 on page 6 of the STD 910</td> </tr> </tbody> </table> <ul style="list-style-type: none"> <li>• Complete and sign all documents, where appropriate</li> <li>• Return hiring documents to the PL/AC</li> </ul>	If	Then	Second or fourth box on the second page of the STD 910 is checked	<p>The hiring supervisor:</p> <ul style="list-style-type: none"> <li>• Opens dialogue with the EE to ascertain what limitations s/he may have or what equipment, work schedule, etc. is needed</li> <li>• Takes detailed notes regarding conversation</li> <li>• <b>Does not</b> determine the type of accommodation</li> <li>• Informs EE that the RAC will contact him/her to discuss reasonable accommodation and ends the job offer discussion</li> <li>• Has the EE sign all documents</li> <li>• Signs all documents</li> <li>• Forwards all but STD 610 documents to PL/AC for routing to RAC</li> </ul>	Accommodation indicated	Follow steps 6 - 8 on page 6 of the STD 910
If	Then						
Second or fourth box on the second page of the STD 910 is checked	<p>The hiring supervisor:</p> <ul style="list-style-type: none"> <li>• Opens dialogue with the EE to ascertain what limitations s/he may have or what equipment, work schedule, etc. is needed</li> <li>• Takes detailed notes regarding conversation</li> <li>• <b>Does not</b> determine the type of accommodation</li> <li>• Informs EE that the RAC will contact him/her to discuss reasonable accommodation and ends the job offer discussion</li> <li>• Has the EE sign all documents</li> <li>• Signs all documents</li> <li>• Forwards all but STD 610 documents to PL/AC for routing to RAC</li> </ul>						
Accommodation indicated	Follow steps 6 - 8 on page 6 of the STD 910						

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<sup>2</sup> The term "understand" may require the employee to provide an interpreter (friend or family member) at the time of the firm job offer, if the prospective employee does not speak English, is not fluent in English, is hearing impaired or visually impaired. The hiring supervisor must inform the prospective employee to have an interpreter accompany him/her to the job offer discussion.

## Health Questionnaire (with Physician's Report) STD 610 Procedure, Continued

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**How to  
complete  
and process  
an approved  
STD 610**  
(continued)

Step	Action
3	<ul style="list-style-type: none"><li>• Generally, the PL schedules a medical examination with a physician, who completes the remainder of the STD 610; if the EE has a personal physician, the EE may schedule the examination him/herself; <b>if lifting, bending, stooping, etc. is a required repetitive physical requirement of the job, the PL must request the physician complete the "lift test" and attach it to the STD 610/2066 upon return</b></li></ul>
4	<ul style="list-style-type: none"><li>• Upon return of the STD 610 by selected candidate, the PL/AC reviews questionnaire that all questions have been completed<ul style="list-style-type: none"><li>✓ <b>makes a copy of STD 610 and forwards to the PS for medical file in an envelope marked "confidential" with the EE's name, organization # and unit #</b></li><li>✓ <b>submits STD 610 with EF Duty Statement to SPB Medical Officer</b></li><li>✓ <b>notifies PS that STD 610 has been submitted for review by SPB Medical Officer and to notify PL and C&amp;P Analyst when approval/denial/STPP received</b></li></ul></li></ul>
5	<ul style="list-style-type: none"><li>• Notifies hiring supervisor of approved STD 610 and that a start date may be given to the employee</li></ul>
6	<ul style="list-style-type: none"><li>• The hiring supervisor contacts the employee to negotiate his/her start date</li></ul>
7	<ul style="list-style-type: none"><li>• PL/AC forwards all hiring documents to the PS for processing the appointment</li></ul>

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## Health Questionnaire (with Physician's Report) STD 610 Procedure, Continued

**How to complete and process a disapproved or questionable STD 610** Follow the steps in the table below to complete and process a disapproved or questionable STD 610. Steps 1 through 3 on page 12 have been completed.

Step	Action
4	<ul style="list-style-type: none"> <li>• If disapproved, the PL/AC notifies the hiring supervisor to contact the employee and inform him/her they cannot be hired and providing him/her with the Medical Officer's rationale for the disapproval (<b>Note: you may revoke an employment offer based on information obtained from the medical examination, after SPB Medical Officer review and comment, if the criteria used are job-related and consistent with business necessity. But, you also must show that even with reasonable accommodation, the individual would be unable to perform the essential job functions. Further, you may screen out an applicant on the basis of a disability if the individual poses a “direct threat,” i.e., a significant risk of substantial harm to himself or others, and the risk cannot be adequately reduced by reasonable accommodation. Any such revocation must be reviewed and approved by the Office of Human Resources (OHR)</b>)</li> <li>• If questionable (Subject to Proper Placement-STPP), the PS forwards the to the C&amp;P Analyst, which may require consultation with the RAC for reasonable accommodation determination and implementation</li> </ul>
5	The RAC works with the employee, hiring supervisor and Medical Officer: <ul style="list-style-type: none"> <li>• To determine the appropriate reasonable accommodation</li> <li>• Notifies the Classification and Pay (C&amp;P) Analyst of any change in duties or working conditions to ensure appropriate allocation</li> </ul>
6	If reasonable accommodation is approved, the RAC: <ul style="list-style-type: none"> <li>• Initials the STPP</li> <li>• Forwards STPP to C&amp;P Analyst, PL/AC with a copy of the amended duty statement</li> </ul>
7	The PL/AC informs the hiring supervisor the STPP is approved and what limitations, etc., if any and that s/he contact the employee with a start date
8	The hiring supervisor notifies the employee of his/her start date

*Continued on next page*

## Health Questionnaire (with Physician's Report) STD 610 Procedure, Continued

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How to  
complete  
and process  
a  
disapproved  
or  
questionable  
STD 610  
(continued)

Step	Action
9	The PL/AC forwards all hiring documents to the PS, and makes <b>three</b> copies of the revised <b>EF Duty Statement</b> , <ul style="list-style-type: none"><li>• One for the hiring supervisor's work file for use in performance appraisals, training or possible disciplinary action</li><li>• One for the employee</li><li>• One for the employee's Official Personnel Folder (OPF)</li></ul>
10	The PS processes the appointment
11	The EE starts work and completes remaining appointment paperwork

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**Warning!**      **A prospective employee cannot start work until the STD 610 has been signed, reviewed and approved by the SPB Medical Officer!**

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## Functional Ability Health Questionnaire (SPB 2066)

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### Overview

The Functional Ability Health Questionnaire (SPB 2066) may be used as an alternative to the Essential Functions Health Questionnaire (STD 910), or as an alternative to the Health Questionnaire (with Physician's Report), STD 610:

- Transfer
  - Out-of-class assignment
  - Training and Development (T&D) assignment
  - Temporary Authorization Utilization (TAU)
  - Reasonable accommodation
  - Industrial limited duty
  - Non-industrial limited duty
  - Retired annuitant, if separated more than two years or with a change in duties from prior position
- 

### Purpose

The SPB 2066 is recommended for use:

- for those classifications that do not require an STD 610 (medical examination), pursuant to the classification specification and the following as determined by the DGS, but some tasks to be performed require some physical or mental component:
    - a. operation of heavy motorized vehicles/equipment or vehicles engaged in transportation of passengers (this does not include driving incidental to performance of State business)
    - b. responsibility for custody , control, or direct contact with incarcerated or institutionalized individuals
    - c. continuously rotating or back-to-back shift assignments (working more than one shift without a 15-hour rest period) or extended work shifts
    - d. performance of tasks at unsafe distance from the ground with or without safety apparatus (e.g., poles, scaffolds, tree tops, bridge suspensions, etc.) or near heavy or fast moving machinery or traffic
    - e. repetitive lifting or carrying 25 pounds or more
    - f. any other functional or environmental demand as determined by the DGS and/or the State Personnel Board (SPB) Medical Officer
- 

*Continued on next page*

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## Functional Ability Health Questionnaire (SPB 2066), Continued

**Roles and responsibilities** The following table depicts the roles and responsibilities in the SPB 2066 process.

Role	Responsibility
Personnel Liaison (PL)/Attendance Clerk (AC)	<ul style="list-style-type: none"> <li>• Insert appropriate information on page 2 of the SPB 2066</li> <li>• Insert tasks statements to the appropriate question(s) on pages 3 through 18</li> <li>• Attach EF Duty Statement</li> <li>• Forward to hiring supervisor</li> <li>• Upon completion and return of SPB 2066, forward all hiring documents to Personnel Specialist (PS)</li> <li>• Retain all hiring documents (except SPB 2066)</li> <li>• Make copies of EF duty statement</li> <li>• Forward SPB 2066 to SPB Medical Officer for review and approval <b>(retain a copy and forward to the PS for medical file, as SPB Medical Office will not return)</b></li> </ul> <p><b>NOTE:</b> SPB does not return SPB 2066 to PS; therefore, send an email to your assigned PS that form was sent to SPB and to notify you when cleared (approved/denied/STPP) to continue processing appointment.</p>

*Continued on next page*

**Functional Ability Health Questionnaire (SPB 2066),** Continued

**Roles and responsibilities**  
(continued)

Role	Responsibility						
Hiring supervisor	<ul style="list-style-type: none"> <li>• <b>Does not</b> provide SPB 2066 during interviews</li> <li>• Conducts an interactive process when firm job offer made including review of the EF duty statement and explanation of the SPB 2066 requirement</li> </ul> <table border="1" data-bbox="583 688 1500 1402"> <thead> <tr> <th data-bbox="583 688 894 724">If</th> <th data-bbox="894 688 1500 724">Then</th> </tr> </thead> <tbody> <tr> <td data-bbox="583 724 894 1329">Second, third, or fourth box on the applicable question of the SPB 2066 is checked</td> <td data-bbox="894 724 1500 1329"> The hiring supervisor: <ul style="list-style-type: none"> <li>• Reviews page 20 and/or 21 to ascertain what limitations the EE may have or what equipment, work schedule, etc. is needed</li> <li>• Takes notes as appropriate</li> <li>• <b>Does not</b> determine the type of accommodation</li> <li>• Informs EE that the RAC will contact him/her to discuss reasonable accommodation and ends the job offer discussion</li> <li>• Has the EE sign all documents</li> <li>• Signs all documents</li> <li>• Forwards all but SPB 2066 documents to PL/AC for routing to RAC</li> </ul> </td> </tr> <tr> <td data-bbox="583 1329 894 1402">Accommodation indicated</td> <td data-bbox="894 1329 1500 1402">Follow steps 6-12 on page 80.5 and 80.6 for the STD 910</td> </tr> </tbody> </table>	If	Then	Second, third, or fourth box on the applicable question of the SPB 2066 is checked	The hiring supervisor: <ul style="list-style-type: none"> <li>• Reviews page 20 and/or 21 to ascertain what limitations the EE may have or what equipment, work schedule, etc. is needed</li> <li>• Takes notes as appropriate</li> <li>• <b>Does not</b> determine the type of accommodation</li> <li>• Informs EE that the RAC will contact him/her to discuss reasonable accommodation and ends the job offer discussion</li> <li>• Has the EE sign all documents</li> <li>• Signs all documents</li> <li>• Forwards all but SPB 2066 documents to PL/AC for routing to RAC</li> </ul>	Accommodation indicated	Follow steps 6-12 on page 80.5 and 80.6 for the STD 910
If	Then						
Second, third, or fourth box on the applicable question of the SPB 2066 is checked	The hiring supervisor: <ul style="list-style-type: none"> <li>• Reviews page 20 and/or 21 to ascertain what limitations the EE may have or what equipment, work schedule, etc. is needed</li> <li>• Takes notes as appropriate</li> <li>• <b>Does not</b> determine the type of accommodation</li> <li>• Informs EE that the RAC will contact him/her to discuss reasonable accommodation and ends the job offer discussion</li> <li>• Has the EE sign all documents</li> <li>• Signs all documents</li> <li>• Forwards all but SPB 2066 documents to PL/AC for routing to RAC</li> </ul>						
Accommodation indicated	Follow steps 6-12 on page 80.5 and 80.6 for the STD 910						
Personnel specialist (PS)	<ul style="list-style-type: none"> <li>• Processes appointment</li> <li>• Forwards hiring documents to Customer Resource Unit (CRU) for filing</li> </ul>						
Customer resource unit (CRU)	<ul style="list-style-type: none"> <li>• Separate SPB 2066, with attached EF Duty Statement from hiring documents and file accordingly</li> </ul>						

*Continued on next page*

## Functional Ability Health Questionnaire (SPB 2066), Continued

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**Roles and responsibilities**  
 (continued)

Role	Responsibility				
Reasonable accommodation coordinator (RAC)	<ul style="list-style-type: none"> <li>• Work with the employee and if necessary, the hiring supervisor and SPB Medical Officer</li> </ul> <table border="1" data-bbox="615 611 1435 760" style="margin-left: 40px;"> <thead> <tr> <th data-bbox="615 611 1024 646">If</th> <th data-bbox="1024 611 1435 646">Then</th> </tr> </thead> <tbody> <tr> <td data-bbox="615 646 1024 760">STPP indicated</td> <td data-bbox="1024 646 1435 760">May implement or deny reasonable accommodation</td> </tr> </tbody> </table> <ul style="list-style-type: none"> <li>• Notifies and returns STPP PL/AC and C&amp;P Analyst of approval and/or limitations</li> </ul>	If	Then	STPP indicated	May implement or deny reasonable accommodation
If	Then				
STPP indicated	May implement or deny reasonable accommodation				
Prospective employee	<ul style="list-style-type: none"> <li>• Understand EF duty statement and SPB 2066</li> <li>• Complete the appropriate questions indicated on pages 3-18</li> <li>• Sign and return forms to hiring supervisor</li> </ul>				

## Physical Requirements of Position (PRP) Form

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**Purpose** The purpose of this form is to provide programs with a tool to clarify the physical requirements of each position or group of positions with “like” tasks, which are stated on the duty statement, to enhance the hiring process and be prepared for potential reasonable accommodation issues.

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**When is the PRP required?** The PRP is NOT required but is recommended as a tool:

- When filling a position that requires a medical examination (see list of classifications; attached);
- When modifying the physical requirements/duties of a position

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**PRP completion** The Personnel Liaison (PL) and the position’s immediate supervisor complete the PRP according to the following steps.

Step	Action
1	Based on the classification specification and duty statement, the PL and/or immediate supervisor complete the PRP; additionally, the PL should establish a PRP file for future vacancies
2	When a firm job offer is made, the hiring supervisor may present the PRP to the potential employee for clarification of the physical requirements of the position

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## Medical Clearance Resources

**Resources** The table below lists various resources relating to medical clearances.

<b>Resource</b>	<b>Section</b>
Human Resources Policy Memos	07-001 supercedes all other HR memos on subject
Law and Regulation <a href="http://leginfo.legislature.ca.gov/faces/codesTOCSelected.xhtml">http://leginfo.legislature.ca.gov/faces/codesTOCSelected.xhtml</a> <a href="http://www.spb.ca.gov/">http://www.spb.ca.gov/</a>	GC 18931, 19253.5, 19261  SPB Rule 172.3, 173
Memo of Understanding (MOU) <a href="http://www.calhr.ca.gov/state-hr-professionals/Pages/bargaining-contracts.aspx">http://www.calhr.ca.gov/state-hr-professionals/Pages/bargaining-contracts.aspx</a>	Applicable MOU
Responsible Control Agency and/or Program <a href="http://www.spb.ca.gov/">http://www.spb.ca.gov/</a>	SPB
State Administrative Manual (SAM) <a href="http://sam.dgs.ca.gov/home.aspx">http://sam.dgs.ca.gov/home.aspx</a>	0191
Selection Manual	7500
<b>Other:</b>	
Personnel Policy & Procedure Manual (PPPM)	40
STD 910	<a href="http://www.documents.dgs.ca.gov/osp/pdf/std910.pdf">http://www.documents.dgs.ca.gov/osp/pdf/std910.pdf</a>
STD 610	<a href="http://www.documents.dgs.ca.gov/osp/pdf/std610.pdf">http://www.documents.dgs.ca.gov/osp/pdf/std610.pdf</a>
SPB 2066	<a href="http://www.documents.dgs.ca.gov/ohr/pom/Functional Ability HQ SPB 2066.doc">http://www.documents.dgs.ca.gov/ohr/pom/Functional Ability HQ SPB 2066.doc</a>
Physical Requirements of Position form	<a href="http://www.documents.dgs.ca.gov/ohr/pom/Physical Requirements of Position form.doc">http://www.documents.dgs.ca.gov/ohr/pom/Physical Requirements of Position form.doc</a>

## ATTACHMENT 1

### List of Classifications that Require STD 610 or SPB 2066

**List of classes**

The following table lists the various classifications that require a STD 610, based on language contained in the classification specification, in alphabetical order.

<b>Class Title</b>	<b>Class Code</b>
Assistant Chief, BPM	6666
Assistant Civil Engineer	3126
Associate Civil Engineer	3123
Associate Industrial Engineer	3584
Associate Industrial Hygienist	3856
Associate Mechanical Engineer	3582
Automobile Mechanic	6851
Automotive Pool Attendant I	6898
Automotive Pool Attendant II	6897
Automotive Pool Attendant III	6894
Associate Printing Plant Superintendent	7222
Bookbinder I	7404
Bookbinder II	7402
Bookbinder III	7401
Bookbinder IV	7399
Building Maintenance Worker	6215
Carpenter I	6476
Carpenter II	6475
Carpenter Supervisor	6470
Chief Engineer I	6698
Chief Engineer II	6695
Construction Inspector I	4033
Construction Inspector II	4032
Construction Supervisor I	4031
Construction Supervisor II	4030
Construction Supervisor III	4029
Custodian	2011
Custodian Supervisor II	2002
Custodian Supervisor III	2001
Digital Composition Specialist I	7255
Digital Composition Specialist II	7256
Digital Composition Specialist III	7258
Digital Print Operator I	1411

*Continued on next page 80.22*

**List of Classifications that Require STD 610 or SPB 2066,**  
Continued

**List of  
classes  
(continued)**

<b>Class Title</b>	<b>Class Code</b>
Digital Print Operator II	1412
Direct Construction Supervisor I	4036
Direct Construction Supervisor II	4038
Direct Construction Supervisor III	4045
District Structural Engineer	3332
Electrical Engineer <sup>3</sup>	3613
Electrical Inspector II	4034
Electrician I	6533
Electrician II	6532
Electrician Supervisor	6530
Electronics Technician	6913
Elevator Operator	2034
Fire & Life Safety Officer I	4348
Fire & Life Safety Officer II	4351
Groundskeeper	0731
Hearing Reporter	1229
Heavy Equipment Mechanic	6834
Heavy Truck Driver	6378
Inspector of Automotive Equipment	6892
Interagency Messenger	1697
Junior Inspector of Automotive Equipment	6871
Laborer	6223
Lead Automobile Mechanic	6850
Lead Custodian	2003
Lead Groundskeeper	0725
Lithographic Platemaker	7325
Locksmith I	6642
Mailing Machines Operator I	1779
Mailing Machines Operator II	1780
Mailing Machines Supervisor I	1459
Maintenance Mechanic	6940
Maintenance and Service Occupational Trainee	9992
Materials and Stores Specialist	1506
Materials and Stores Supervisor	1503
Mechanical Engineer	3583
Mechanical Inspector II	4037
Mechanic's Helper	6837

Continued on next page 80.23

**List of Classifications that Require STD 610 or SPB 2066, Continued**

<sup>3</sup> Telecommunications Division positions do not require a medical examination (STD 610).  
ORIGINAL ISSUE DATE: 2/04 REVISION DATE: 5/08

**List of classes**  
(continued)

<b>Class Title</b>	<b>Class Code</b>
Mechanical and Technical Occupational Trainee	9993
Office Building Manager I	6675
Office Building Manager II	6673
Office Building Manager III	6672
Office Building Manager IV	6671
Office Machine Service Technician	6782
Office Machine Service Technician (Electronic)	6797
Office Machine Service Technician Trainee	6785
Offset Press Assistant	7335
Painter I	6526
Painter II	6525
Painter Supervisor	6520
Plumber I	6549
Plumber II	6548
Plumber Supervisor	6543
Principal Structural Engineer	3330
Printing Plant Machinist	7431
Printing Trades Assistant I	7438
Printing Trades Assistant II	7437
Printing Trades Specialist II (General)	1499
Printing Trades Specialist Trainee (General)	1485
Restoration Supervisor I	6644
Restoration Supervisor II	6647
Restoration Work Specialist	6648
Restoration Worker	6651
Senior Civil Engineer	3120
Senior Electrical Engineer	3600
Senior Equipment Material Specialist	1542
Senior Landscape Architect	3983
Senior Inspector of Automotive Equipment	6855
Senior Mechanical Engineer	3579
Senior Telecommunications Technician	6910
Service Assistant – Automotive	6917
Service Assistant (Duplicating)	1484
Service Assistant – Maintenance	9994
Service Assistant – Warehouse and Stores	1510
Sheetfed Offset Press Operator I	7327

*Continued on next page 80.24*

**List of Classifications that Require STD 610 or SPB 2066, Continued**

**List of  
classes**  
(continued)

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<b>Class Title</b>	<b>Class Code</b>
Sheetfed Offset Press Operator II	7324
Sheetfed Offset Press Operator III	7330
Sheetfed Offset Press Operator IV	7329
Skilled Laborer	6212
Stationary Engineer	6712
Stationary Engineer Apprentice (Four-Year Program)	6717
Stock Clerk	1509
Supervising Groundskeeper I	0719
Supervising Groundskeeper II	0717
Supervising Structural Engineer	3331
Supervising Telephone Operator	1625
Supervisor of Building Trades	6753
Telecommunications Maintenance Supervisor I	6909
Telecommunications Technician	6911
Telecommunications Technician Trainee	6912
Tree Maintenance Leadworker	0745
Tree Maintenance Worker	0748
Truck Driver	6381
Warehouse Manager II	1500
Warehouse Worker	6220
Webfed Offset Press Operator II	7331
Webfed Offset Press Operator III	7332
Webfed Offset Press Operator IV	7333
Window Cleaner	2037

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