

Part I:

Background Information

Accounting Clerk Case Study

BACKGROUND

Progressive cervical disc disease and carpal tunnel syndrome was impacting the performance of William, an employee working in the Tax Collections Section of the Employment Development Department in a large State Agency. His position of Accounting Clerk requires him to spend the entire 10 hours of his shift on the computer, primarily using Excel and Word software. He frequently uses the keypad on his keyboard.

A Rehabilitation Engineer was asked to evaluate the worksite and make recommendations to improve the ergonomics of his workstation and decrease the strain on his neck and wrist.

FUNCTIONAL CAPACITIES/LIMITATIONS

William was able to tolerate sitting for most of the day, as long as he took breaks. He had normal range of motion and strength in his hands and arms but noted his pain to begin in his right wrist and move up his arm into his neck. He did experience limited range of motion in his neck. He began needing more and more frequent breaks and found it difficult to concentrate for extended periods, due to increased levels of pain. The employer was concerned about continued work exacerbating his condition and causing a period of total disability and requested that William's physician complete a form outlining his capacities.

William's physician completed a functional capacity form outlining his restrictions and making the following recommendations:

1. Minimize lifting and carrying over 20 pounds.
2. Maintain neck in neutral position as much as possible to avoid complications due to limited range of motion.
3. Maintain wrists in neutral position.
4. Take short breaks every hour, to include stretching exercises for both neck and hands.

JOB DESCRIPTION/PROBLEM IDENTIFICATION

Bookkeeping and accounting clerks are an organization's financial record keepers. They compute, classify, record and verify numerical data in order to develop and maintain financial records. William uses Excel and must also write reports, requiring him to sit for extended periods of time. Many clerks experience eye and muscle strain, backaches, headaches, and repetitive motion injuries, similar to the complications encountered by this consumer. It can be difficult for Accounting Clerks to frequently change positions, as time away from the computer is typically non-productive.

Essential Functions of the Job

1. Compile and sort documents, such as checks and invoices.
2. Verify and post details of tax collection transactions and total accounts, using calculator or computer.
3. Compute and record charges, refunds, and penalties.
4. Type vouchers, checks, account statements, reports and other records using computer.

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