



## **Policy and Procedure: Workers' Compensation- Case Manager Appointment**

**Effective date:** 03-2011

**Policy Statement:** To allow for documentation and authorization for a workers compensation case manager to attend an appointment with a patient and to promote a helpful understanding of COSM's work comp procedures.

### **Procedure**

#### **Scheduler:**

**Nurse Case Manager** calls to request an appointment. (***READ carefully all Centricity POP UP Windows for instructions***)

- COSM will confirm the appointment date and time and place the case manager on the schedule to be seen with the provider.
- Scheduler informs the case manager that they will need to contact the patient to inform them that they will be attending the next office visit. Explain that the patient will be asked to sign an authorization to allow the case manager to attend the appointment. Explain that it is not a separate appointment but they are in the room with the patient and the provider.
- Explain there is a \$100.00 fee to attend the appointment.

#### **Patient calls**

When patient calls, put the appointment in Centricity for the same time and advise the patient of COSM policy for them to sign an authorization at the time of the visit.

#### **Front Desk:**

- Nurse case manager is on the schedule to be seen with the patient.  
Give the authorization packet to the Case Manager and explain they need to review and ask the patient to sign to authorize the visit.

NOTE: The case manager needs to understand this form and review with the patient so that the correct information is obtained. Staff should be familiar with the process and be able to answer questions. COSM only releases the W/C Visit form- not additional notes nor do they complete additional forms.

- Nurse Case Manager is **not on the schedule but arrives** with the patient.  
Give the authorization packet to the Case Manager and explain they need to review and ask the patient to sign to authorize the visit.

NOTE: The case manager needs to understand this form and review with the patient so that the correct information is obtained. Staff should be familiar with the process and be able to answer questions. COSM only releases the W/C Visit form- not additional notes nor do they complete additional forms.

The Appointment Authorization form will be placed in the blue guide for the MA to show the authorization is signed and appropriate for the nurse to attend the appointment.



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This form will be scanned under NOTES by the medical records department showing the date of the appointment.

CWI's policy to communicate the Workers' Compensation Visit Information will be scanned under ADMIN. The MA is responsible to make sure this form is signed by the patient so that the Workers' Compensation Visit Information form can be given to the nurse case reviewer at the office visit.