



MANAGING A CLAIM

SET SEG Risk Control consultants developed the following recommendations to help districts manage employee injuries and establish a thorough and timely claim reporting process. Since districts oversee an injured employee's medical treatment for 28 days, it is critical to have the appropriate procedures in place to ensure quality care and to maximize potential cost savings. These steps can be customized to fit the district's specific needs.

WHAT TO DO WHEN AN EMPLOYEE IS INJURED

- Employee reports injury to immediate supervisor.
- For non-emergencies, employee immediately completes employee report form and sees school nurse, if available.
- Supervisor immediately emails/faxes employee report form to the district workers' compensation coordinator. The supervisor's report should be completed and submitted within 24 hours.
- District coordinator provides employee with a signed initial authorization to treat form; the form must accompany the employee on his/her first visit to the designated medical clinic.
- District coordinator submits the claim via Origami and attaches the employee report, supervisor's report, and initial authorization form. Please do not wait to report a claim if the necessary reports and forms aren't yet available – these can be forwarded once received.

WHAT TO DO AFTER THE EMPLOYEE'S INITIAL MEDICAL CLINIC VISIT

- Employee provides a hard copy of the clinic's activity status report to direct supervisor.
- Clinic emails activity status report to district coordinator and CRS claim contact. CRS works with district coordinator to accommodate work restrictions outlined in the report. District coordinator works directly with the employee's supervisor to address restricted work options.
- CRS works with medical clinic on approval of future visits and prescribed treatments, including physical therapy, diagnostic tests, and specialist referrals.
- If disability is greater than seven days, CRS will follow up as a lost time claim. The district may need to send employee a letter outlining return to work directions.

CHECKLIST TO ESTABLISH A GOOD RELATIONSHIP WITH YOUR MEDICAL CLINIC

Designated medical clinics maintain a profile of procedures that should be followed whenever a district employee receives treatment for an on-the-job injury. The checklist on the following page features the main components that should be included in your district's profile; these procedures help foster an effective relationship with the district's clinic. For further assistance, contact your SET SEG Risk Control consultant.



MANAGING A CLAIM CONTINUED ...

- ☐ District provides medical clinic with a list of district contacts, phone numbers, and email addresses
- ☐ District provides medical clinic with a list of job descriptions
- ☐ District workers' compensation coordinator maintains a list of phone numbers and emails for medical clinic, CRS claim contact, CRS nurse case manager, and SET SEG Risk Control consultant
- ☐ District shares internal reporting procedures and designated clinic protocol with CRS claim contact
- ☐ CRS claim contact provides contact information to medical clinic
- ☐ Medical clinic agrees to see district employees only when an initial authorization to treat form is provided. If employee does not provide the form, the clinic should call the district coordinator
- ☐ Medical clinic emails activity status report to district coordinator and CRS after employee's initial visit. The report must include:
 1. Occupational or non-occupational injury or disease
 2. Current diagnosis/updated diagnosis (if changed from initial visit)
 3. Anticipated length of treatment/disability
 4. Work restrictions or limitations, including weight limitations
 5. Prescription information, including drug name and dosage
 6. Physical therapy prescribed and location where therapy is to occur (if not a lost time claim, therapy must be scheduled before or after employee's work hours)
 7. Next medical appointment, including date, time, location, and treating physician (employee should be seen by same physician for each visit when possible)
- ☐ Medical clinic emails district coordinator and CRS claim representative if appointments are missed
- ☐ Medical clinic seeks CRS authorization for all treatments following employee's initial visit
- ☐ CRS informs district coordinator about authorized follow-up treatment, physical therapy, and specialist referrals

SET SEG Risk Control Services offer districts access to customized consultations, assessments, trainings and informational resources to help ensure the safety of your students, staff and visitors. Through on-site visits, our dedicated consultants work with districts to maintain site safety and identify potential risks and hazards before they become problems.

For more information about the procedures outlined in this tip sheet or the services available from our consultants, please contact SET SEG Risk Control at (800) 292-5421.