

Workers' Compensation Designee Reference Checklist

To track progress and coordinate responsibilities among interested parties, the main workers' compensation coordinator can use this checklist upon witnessing or receiving a report of injury/illness. This is a *guideline only* for common steps to be followed and you may revise/delete/add according to your company practices. Remember to Conduct initial sit-down with worker to go over necessary documents, what to expect in the workers' comp process, and address any concerns and give worker other helpful documents such as RTW policy, pharmacy card, claim adjuster contact information and claim number.

Note: These actions are not necessarily completed in this order and may occur simultaneously.

Employee Name:	Date of injury/illness:
Injury/Illness Description:	
Employee Phone #:	Claim #:
Claims Adjuster:	Claims Adjuster Phone #:

Step #	Action	Date Action Completed	Who Completed
Initial medical treatment and investigative actions			
1	Determine if emergency services or first aid are needed. *Emergency Medical Treatment is not considered first choice of health care provider (HCP)*		
2	If not an emergency, determine if medical treatment is necessary and advise worker of first choice/ second choice of HCP.		
3	Secure scene where accident/incident occurred and ensure no imminent danger to other workers; Refer to safety program for investigative and follow up process		
4	Based on your policy regarding drug/alcohol testing, send/drive worker to appropriate site to be tested		
5	Give worker Grab 'N Go Kit, job description, and Provider's Report of Physical Ability (PROPA) to take to medical provider for all appointments.		
6	Advise worker to return Provider's Report of Physical Ability after each HCP appointment and to keep appropriate contact apprised of progress		
Initial reporting/recording actions			
7	Receive completed "Notice of Accident" (NOA) and "First Report of Injury" (E-1) form from worker and submit to claim adjuster within 72 hours from the time of knowledge of injury/illness – give worker copies		
8	Receive completed "Worker's Authorization for Use & Disclosure of Health Records" form from worker – give worker a copy		
9	Determine if incident is an OSHA recordable and fill out necessary OSHA log/recording documents		
After worker has received medical treatment			
10	Receive Provider's Report of Physical Ability or RTW status from HCP and/or worker		
If worker is not released to ANY work at all by medical provider			
11	Sit-down with worker to explain workers' comp indemnity, leave options, short-term disability, health/retirement benefits, ongoing expectations		
12	Provide FMLA paperwork, if appropriate, and Set-up leave tracking system, reminders of important upcoming medical appointments. Document all contact with worker		

13	If more than 7 days (does not have to be consecutive) of lost time or other indemnity anticipated, provide adjuster appropriate payroll records to calculate workers' comp benefits		
14	Communicate regularly with adjuster re: claim status, and any issues you may observe		
15	Set-up weekly reminders to contact worker to preserve the employer/employee relationship and address concerns while worker is out		
If worker is released to light/modified duty by medical provider			
16	Review with supervisor(s) to identify transitional duty/appropriate accommodations		
17	Send formal job offer letter of transitional duty to worker. Verify acceptance, agreed upon start date, terms, expectations and give copy to supervisor		
18	Provide adjuster copy of Provider's Report of Physical Ability, transitional duty job offer letter copy/acceptance and RTW date		
19	Welcome/reorient worker on first day, explain monitoring process, advise not to violate restrictions and promptly report issues		
20	Schedule weekly follow-ups with employee and supervisor to ensure RTW is going as planned, set reminders of important upcoming medical appointments		
21	Adjust duties/terms as needed upon each new Providers Report of Physical Ability with new restrictions		
22	If any issues arise, address promptly and communicate with adjuster		

Once the worker reached Maximum Medical improvement (MMI) and a full-duty release is received, return worker back to original position with no restrictions. If full duty release is not obtained but MMI has been reached, determine if permanent restrictions can be accommodated. Communicate with worker/supervisor of any permanent accommodations and document/engage in ADA interactive process if appropriate. When appropriate, check with adjuster re: closing file and retain all needed documents according to appropriate retention schedules