



Notes Refresher

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The Purpose of V3 Notes

- All data elements gathered during the initial investigation of the claim must be documented in V3 notes.
- Notes are a chronological record of events and activities in a claim.
- They provide a complete history of a claim throughout its life cycle.
- **Notes are considered legal documents and public record.**
- A Claims Service Specialist (CSS) uses notes as a tool to manage a claim by documenting:
 - Facts gathered during the investigation phase of a claim
 - Issues identified throughout the life of a claim
 - Action steps to resolve claim issues
 - Outcomes of claim issue resolution
 - Compensation payments and adjustments
 - Claim actions, decisions and the reason(s) for the decision
- Other information that should be documented in notes includes:
 - Summary of staffing/meeting(s) held with CCT
 - Customer feedback that is claim specific
 - All telephone contacts
 - Correspondence to and from parties of the claim as well as the MCO
 - Onsite visits...e.g. Risk, Safety and Hygiene
 - Brief summary of medical reports or evidence
 - Results of IC hearing orders, BWC orders and Appeals
 - Action plans developed by the CSS or CCT that contain goals of the claim, steps to achieve those goals, team member responsible for the action steps, target dates and next staffing date
 - Notes on referrals or consultations from Physician or MCO, legal representatives, rehab, reviews
 - Information the MCO gathered from their contacts that affect the claim and shared with CSS (document name of MCO contact)
 - With undisputed claims, specific medical evidence MCO has on file, but not supplied hard copy to CSS, that is the basis for BWC decision(s)
 - Types of compensation payments and the period of payment (TT paid from 1/1/06 to 3/31/06)