Case conferences

Claim management

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Introduction

Case conferences involve relevant stakeholders who are brought together to develop a joint strategy to manage a claim or to discuss actions that will facilitate improved rehabilitation, return to work and recovery outcomes for an employee.

Claims management is collaborative and requires a multi-disciplinary approach with claims officers, injury management and other team resources working together.

There are three types of case conferences that could occur:

- injury management (IM)/return to work (RTW) case conference – a meeting between Comcare and other relevant stakeholders including the employee, employer and rehabilitation provider (WRP) where appropriate, to progress the employee's return to work and rehabilitation
- practitioner case conference – Comcare encourages practitioners (usually the treating GP) to participate in RTW case conferencing by providing them with the opportunity to request a case conference on the medical Certificate of Capacity Certificate of Capacity for Work form; this type of case conference may also be arranged if deemed appropriate to progress a claim
- employer/agency case conference – a meeting between Comcare and an employer to discuss liability and/or rehabilitation and RTW matters in relation to several claims. The purpose of this type of case conference is usually to develop a joint strategy to manage/progress several claims, to review emerging claims that are impacting premium and will support the agency achieve their business plan objectives, and to discuss RTW and rehabilitation strategies.

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Managing a case conference

When opening a case conference:

- always start on time
- introduce each participant and provide a brief description of their role
- thank participants for their time
- agree on who will take minutes
- present the reason for the case conference (e.g., to discuss the claim(s) and any barriers in relation to strategy or RTW).

When closing a case conference:

- always try to end the case conference within the allocated time
- if the meeting is going to run over time and there are still issues to be discussed, suggest scheduling another time to continue the discussion
- at the end of the case conference, review the outcomes and/or actions (e.g., who is going to undertake each, and the agreed timeframes for completion)
- minutes to be documented and distributed to all parties.

When taking minutes, it is important to include:

- date and time of the case conference
- employee's name and claim number
- issues discussed
- summary/action items and who is responsible for each including expected timeframes
- date for any review case conference or follow up discussion.

At the completion of a case conference, a summary of the minutes/actions are to be distributed to all participants. These actions will be followed up by the relevant parties to ensure implementation.

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Injury management and return to work case conference

Injury management and return to work case conferences bring relevant parties together to support recovery and return to work outcomes. They are a useful strategy to discuss complex cases and cases where return to work has stalled.

Case conferences require preparation by you, the Injury Manager (IM) and the employer (where required). You and the IM should agree on the format and focus of the meeting and issues to be discussed (taking the employer's requirements into account), and consider the time required to undertake the case conference successfully.

The purpose of this type of case conference can include, but is not limited to:

- considering the employee's capacity for work
- identifying any barriers that may be impacting an employee's return to work
- discussing the health benefits of good work
- agreeing on the strategy required to support an employee's return to work (which can include flexible work arrangements, alternative duties, adjusting the workplace or providing workplace equipment).

The purpose and desired outcome of the case conference will determine who is involved in the case conference, for example, in some instances it may be beneficial to include the workplace rehabilitation provider to provide further detail regarding their involvement in the rehabilitation program underway. In other instances, it may be appropriate to include the treating practitioner e.g., GP, psychologist, physiotherapist etc.

Triggers for arranging a conference include, but are not limited to:

- decisions/actions arising out of a claim review
- IM team receiving an enquiry
- lack of clarity regarding roles of responsibilities in the return to work and recovery process
- unexpected changes in the employee's condition.

Roles and responsibilities:

You should consider the following when preparing for a case conference:

- the desired outcome of the case conference
- the current claims status
- the current medical treatment/services in place
- barriers to rehabilitation and/or return to work.

The IM should consider the following when preparing for a case conference:

- current functional status of the employee including medical certification
- treatment regime including goals, time frames and any relevant reference to MD guidelines
- biopsychosocial issues/barriers that you can identify that may be impacting on recovery and RTW status
- review of the section 37 Rehab Program and identification of any anomalies i.e., are rehab goals aligned to treatment goals?
- strategies to overcome any identified barriers and/or issues.

Role	Responsibilities
Claims Managers (CM)	• during the case conference provide an overview of the claim including a brief history of the claim, the current strategy and goal, and any barriers identified to achieving that goal • participate in the claim discussion and contribute to the agreed actions • assist in the development of agreed actions • review the agreed actions to ensure accuracy.
Injury Managers (IM)	• participate in the claim discussion, providing advice regarding rehabilitation and injury management strategies where required • assist in the development of agreed actions • review the agreed actions to ensure accuracy • add a case conference note in Pracsys.
Claims Administration Officer	• schedule case conference time and date, sending an invite to all attendees • document agreed actions and distribute to the case conference attendees internally first, for confirmation, specifying a due date for feedback

	• distribute agreed actions to attend case conference attendees as appropriate.

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Practitioner case conference

This type of case conference connects the treating practitioner e.g., GP, the employer, the employee and Comcare at the right time to support a return to work. This type of case conference can also be triggered by the RCM usually with the respective WRP, with a request for you and the Injury Manager to attend.

Case conferencing with all parties aims to enhance communication with all stakeholders to promote and support recovery at work. The purpose and desired outcome of the case conference will determine who is involved in the case conference.

When a practitioner has ticked the box on the medical Certificate of Capacity requesting a RTW case conference, it is important that the case conference is organised in a timely way to respond to the practitioner's request. You will need to contact the RCM in the first instance to ensure this is understood and, if not, they will reinforce the need to respond to the request and to maintain good communication with the treating practitioner. Practitioner case conferences will always include the respective Injury Manager in the claim discussions

Role	Responsibilities
Claims Managers (CM)	• contact RCM to confirm who will be arranging the case conference • during the case conference provide an overview of the claim including a brief history of the claim, the current strategy and goal, and any barriers identified to achieving that goal • participate in the claim discussion and contribute to the agreed actions • review the agreed actions to ensure accuracy.
Injury Managers (IM)	• contribute to the claim discussion, providing advice regarding rehabilitation and injury management strategies where required • assist in the development of agreed actions • review the agreed actions to ensure accuracy

	• add a case conference note in Pracsys.
Claims Administration Officer	• schedule case conference time and date if required, sending an invite to all attendees • document agreed actions and distribute to the case conference attendees internally first, for confirmation, specifying a due date for feedback • distribute agreed actions to the Agency where required.

Payment of case conferences

When a practitioner seeks payment from Comcare for a RTW case conference, the meeting must involve the medical practitioner, the employee and a minimum of one other key stakeholder (usually this will be the RCM or WRP but could also include Comcare). The practitioner is not required to state on the invoice who participated in the case conference.

Costs associated with practitioner participation in a RTW case conference are payable under the rehabilitation provisions of the SRC Act. Before payment can be made, you must have authority from the rehabilitation authority (the employer) to make payments. Often this authority will be provided on the rehabilitation program under section 37 of the SRC Act, where RTW case conferences will be included as an activity of the plan. However, where a rehabilitation program has not yet been developed, payments associated with RTW case conferencing can be made under section 36 of the SRC Act. Authority to pay for case conferences under section 36 can be provided verbally or in writing by the RCM. A copy of a recent section 36 referral to a WRP for an Initial Needs Assessment is sufficient authority for payment under section 36. Note that payment for a case conference can also be made under section 70 of the SRC Act if required.

Note: To ensure payment for practitioner participation in a case conference, you should make a comment in Pracsys that rehabilitation is underway. Also, you should authorise payment of the case conference in the 'Payment Authorisation (Treatment Plan)' (ACTP) function in Pracsys.

Reasonable amounts to pay for participation in a case conference

Comcare has advised practitioners that we will pay for their participation in RTW case conferences, in line with the Australian Medical Association (AMA) rates.

However, note that the authority for payment of rehabilitation costs actually sits with the rehabilitation authority and the RCM may agree to pay a different rate for a practitioner's participation in a case conference.

Payment for other treatment provider participation

On occasion, another treatment provider such as a psychologist or physiotherapist may attend a RTW case conference. As they are not eligible to claim AMA rates, you will need to consider if the amount charged is reasonable for their participation.

Note: Normal discussions between an employee's GP and other treatment providers regarding the medical management of the employee, is not a RTW case conference and is not payable by Comcare.

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Employer case conference

Employer case conferences are held with nominated Agencies on a regular basis (monthly, 6-weekly, quarterly) as part of Comcare's delivery of claims management services.

The purpose of this type of case conference can include, but is not limited to:

- a review of emerging claims that are impacting premium
- a review of claims that will support the Agency achieve their business plan objectives e.g., improving rehabilitation and return to work outcomes
- a review of claims identified by the Agency or Comcare
- the opportunity for all parties to learn more about the roles and responsibilities of each party in managing a claim e.g., CMs, RCMs, IMs etc.

Claims reviewed should be identified by agreed criteria, including but not limited to:

- absence from work exceeding an expected timeframe
- protracted rehabilitation program and/or treatment with little or no progress
- claim complexity e.g. secondary conditions, injury circumstance
- where risk factors are present e.g. reputational to the agency or Comcare
- costs to date exceeding an identified figure
- lifetime cost estimate exceeding an identified figure.

Participants in an Employer Case Conference

Practice Support and Account Management (PS&AM) will take responsibility for coordinating bulk case conferences, liaising with Agency representatives and Claims Operations ADs regarding the frequency of case conferences and the claims to be reviewed.

Claims Operations ADs will take responsibility for leading the case conference and contributing to the identification of suitable claims to be discussed. Claims within the premium window (up to a maximum of 8 per case conference) will be reviewed as a priority, however at times a review of long-tail claims may be appropriate.

The claims identified, including the reason for discussion at a case conference, will be confirmed using the Case conference template. This template will also be used for recording the agreed actions on completion of the case conference.

Claims Operations will take responsibility for completion of claim plans prior to the case conference (unless specified otherwise). The assigned Claims Manager will be responsible for providing a claim summary/overview of each claim in collaboration with the aligned Injury Manager at the case conference (this will include outlining a proactive claim strategy). Claim plans are to be sent to the Agency 5 business days prior to the case conference (unless otherwise specified).

A folder has been created within Content Manager within the Claims Management Folder (SC20/32) for the storage of minutes and action items.

This folder has been setup for Claim Support Officers (CSO) and Claim Administration Officers (CAO) to record and store our external case conference minutes and action items in a centralised folder more easily. This process will allow for any internal stakeholder of Comcare (Account Management, Compliance, Claims Managers etc) to search and find relevant information surrounding an agreed action without scrolling through emails and Pracsys comments (which should still occur).

Once all parties have agreed to the discussed actions items, the CSO/CAO should save the completed Case Conference template clearly labelling the document with the date the conference occurred.

Example below:

- Claims Management > Case Conference – Minutes and Action Items > Airservices Australia > "*Conference Actions Items dated 20.03.2023*".

Roles	Responsibilities	When
Comcare Account Manager	Confirm the frequency of case conferences for the calendar year with the Agency. Schedule case conference time and date and send an invite to Agency contact, Claims AD, AD Injury Management and Claims Administration/Support Officer	Monthly/Quarterly or as agreed
	Confirm the list of claims to be reviewed to the Claims AD (maximum of 8 claims to be discussed per case conference)	3 weeks prior to the CC
	Enter the CC interaction in CRM	On completion of the CC
Claims Ops AD	Contribute to identifying suitable claims to be reviewed at each case conference (maximum of 8 claims to be discussed per case conference)	3 weeks prior to the CC
	Ensure you are aware of the claims to be discussed during the case conference and are prepared accordingly	3 weeks prior to the CC
	Ensure attendees are clear regarding expectations regarding the provision of a succinct claim overview during the case conference and explanation of a clear claim strategy.	As required
	Quality check Claim Plans	Within the specified timeframe
	If any CMs are unable to attend, arrange for someone to cover the claim overview in their absence e.g., SCM, aligned IM	As required
	Provide input to claim discussions, advice and guidance as required during the case conference	Within the specified timeframe
	Review the agreed actions to ensure accuracy	
Claims Managers (CM)	Ensure claims have been reviewed (in consultation with an IM where required) and a Claim Plan completed prior to the case conference	Prior to the CC
	Ensure your availability to attend the case conference at the designated time	Prior to and during the CC

	Ensure that any agency-specific requests highlighted in the Case Conference Record are addressed in the Claim Plans/claim discussions where required	
	During the case conference provide an overview of the claim including a brief history of the claim, the current strategy and goal, and any barriers identified to achieving that goal	
	Participate in the claim discussion and contribute to the agreed actions	
	Review the agreed actions to ensure accuracy	Within the specified timeframe
Injury Management AD	Ensure claims have been reviewed by the relevant IM prior to the case conference	Prior to the CC
	Attend case conferences where required	As required
	Provide input to claim discussions, advice and guidance as needed during the case conference	
Injury Managers (IM)	Ensure claims have been reviewed with the Claims Manager prior to the case conference	Prior to the CC
	Contribute to the creation of Claim Plans ensuring that they include a proactive injury management strategy	Prior to the CC
	If unable to attend the case conference, arrange for someone to attend who can cover the IM perspective (for eg the Injury Management AD)	Prior to the CC
	Contribute to the information provided by the CM during the claim discussion, providing advice regarding treatment	

	suitability, recovery timeframes and strategies to enable a return to work.	During the CC
	Add a case conference note in Pracsys Review the agreed actions to ensure accuracy	On completion of the CC
Claims Administration Officer or Claims Support Officer	Forward the completed Case Conference Record outlining the claims to be reviewed, to the relevant Claims Managers, Injury Managers and copy in AD claims and Account Manager. Ensure the email includes the date the Claim Plans are to be reviewed by AD claims. The Claim Plans will be forwarded to the agency contact and internal invitees as one document 5 business days prior to the Case Conferences	3 weeks prior to the CC
	Document agreed actions using the Case Conference Record template and distribute to the case conference attendees internally first, for confirmation, specifying a due date for feedback Save the completed Case Conference Record within HP Content Manager within the Claims Management Folder (SC20/32) clearly labelling the document with the date the conference occurred	Within 2 business days
	Distribute agreed actions to the Agency	Within 5 business days

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