

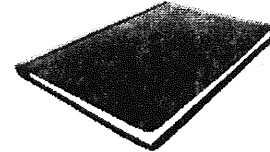
COA Writing Workshop

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The Medical Report

- Clarification of Purpose
- Complete Preparation
- Content
- Communication



Clarification of Purpose

- Verify the purpose of the evaluation with the requestor
- Verify Mechanical Aspects
- Employability determination
- Disability determination
- Confirmation letter
 - place, time purpose
 - no show issues
 - payment issues

Clarification of Purpose

- Verify the requirements of applicable law
- Verify regulations
- Verify provisions of disability insurance policy
- Consider format of the report
- Identify the reader and level of expertise of the reader

Complete Preparation

- Review disability and non-medical records
- Worker's Compensation records
- Disability Insurance Records
- Investigative reports
- Legal records
- Personnel records



Complete Preparation

- Review Medical Records
- Review laboratory results
- Radiographic reports

Complete Preparation

- How to take notes
- Script for history taking
- Forms
- Script for examination
- Prepare for "intangibles"
 - response to request for treatment
 - request for taping and recording
 - who is in the room
- Script for conclusion

Complete Preparation

»Notice of Informed Consent for IME



Content

- Medical history
- Examination
- Laboratory tests
- Special tests and diagnostics
- Medical Specialty Evaluations

Content - Medical History

- Time and circumstances of onset
- Review findings on physical and mental exams prior
- Results of prior tests
- Treatment plans of the past, with success and failure, and compliance
- Current symptoms with attention to exacerbation or aggravation

Content - Examination

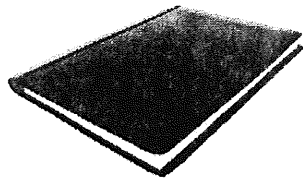
- Be thorough and document that you were thorough
- Measure and record everything germane
- Chaperon all examinees
- Take time to write things down
- Consistency in approach, tone, demeanor

Content - Examination

- Document beginning and conclusion time
- End with a *thank you*
- Offer assistance at end of exam
- Train all staff to be appropriately "overly nice"
- Eliminate Interruptions

Communication

»The Medical Report



The Medical Report

- Is a script for later testimony
- Know that it is permanent
- Create a reference file

Components of the Medical Report

- Introduction
- Results of Clinical Evaluation\Clinical Impressions
- Assessment of Current Health Status
- Medical Management Plan
- Synthesis of Information
- Conclusions and Recommendations

Introduction

- Identifying information
- Referral source
- Purpose of the evaluation
- Cite applicable law or regulations
- Cite criteria for disability and employability
- List of all records, reports, radiographs, et al.



Results of the Clinical Evaluation

- History of the medical condition
 - Method of history taking
 - Who are the history takers
 - Narrative of the history, reference pertinent positives and negatives
 - Differentiate if obtained from records, examinee, or both
 - Comments regarding agreement or disagreement between sources

Results of the Clinical Evaluation

- Findings from physical and mental examination
 - Positive pertinent positive and negative findings
 - Validation signs (Waddle's, SLR goniometer)
 - Ability to dress / undress, get off of chair onto exam table and off of table
 - Walking in and out of room (parking lot?)
 - Report required observations under disability system of record



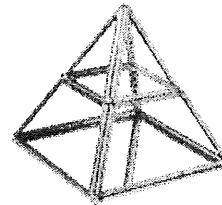
Results of the Clinical Evaluation

- Findings from laboratory tests and diagnostic procedures
- The results of medical specialty evaluations



Clinical Impressions

- Usually listed numerically
- To the point

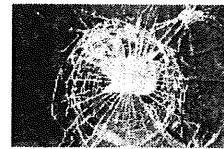


Assessment of Current Health Status

- Is the clinical information sufficient to assess the individual's current health status?
- Is each medical condition static or stabilized? At MMI? Support the conclusion
- Is deterioration or improvement suspected? If so, explain the basis for conclusion, course of condition, and time frames

Assessment of Current Health Status

- Performance related impact
- Risk related impact
- Impact on employability
- Impact on life activities



Medical Management Plan

- Recommendations for further diagnostic testing
- Referral for medical specialty evaluation
- Periodic re-evaluation of active treatment
- Appropriateness of rehabilitation/reconditioning
- Follow-up evaluation

Synthesis of Information

- Review and analyze documentation
- Review and analyze the accumulated medical information
- Correlate the medical and non-medical information
- Establish causation
- Comment on appropriateness of prior treatment

Synthesis of Information

- Likelihood of sudden or subtle incapacitation
- Likelihood that medical condition will improve
- Restrictions of job activities (permanent?)
- Does the examinee meet the disability standards under which the exam is conducted

Conclusions

- What is the burden of proof of meeting disability, employability, and accommodation
- If burden of proof not met, explain what would be necessary to establish such.
- "Reasonable degree of medical certainty / probability"
- Disclaimers

Conclusions

- How do you contact the examinee in case of further questions or new information ?



Other Considerations in the Art of Report Writing

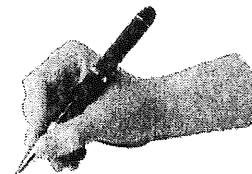
- Establish proper coding, billing
- Nomenclature consistency
- Pertinent References
- Addenda
- Follow AADEP Training

What You Must Understand About The Report

- Will be read (by many)
- Projects your credibility
- It markets your performance

Style Points

- We can not teach you English & Grammar
- Should move the reader forward
- Read it out loud yourself!!
- Accurateness
- Write to persuade
- Relaxed tone



Style Points

- Analogies infrequently, but may drive home a point
- Use headings
- Pay attention to sentence length
- Paragraph length
- Verb tense consistently
- Sentence structure
- Develop a way to edit



Avoid

- Redundancies
- Junk words and phrases
- Clichés
- Over-explaining
- Doctorisms



Avoid

- Passive voice
- "Template" reports
- "It" and "Their"
- Negatives
- Filler phrases
- Financial estimates



Avoid

- Stamped signatures
- Sarcasm
- Certain "no no words"
 - » whatsoever, totally, absolutely, whatever, like, completely, blatant, basically, essentially, clearly, entirely, very, somewhat

Pay Heed To the Reader

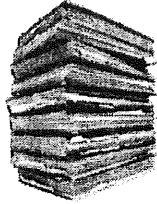
- Some readers will read your report as the tenth report of the day
- Stimulate their interest
- Report for the reader's convenience, NOT the writer
- Define medical terms
- Consistency with numbers and data

Helpful Hints

- Don't use "patient"
- No inference of treatment anywhere
- Pay attention to time deadlines
- Answer all the questions posed to you.
 - May add specifics at the end of the report.
- What about lost dictation / reports?

Quality Improvement / Review

- Use examples of other reports
- Use peers



Transcriptionist Issues

- Dictate same day if possible (Really)
- Establish a pattern
- Be consistent, NO SURPRISES
- Meet with the transcriptionist regularly
- SLOW DOWN, THIS IS IMPORTANT STUFF!!!
- Establish protocol for corrections, appropriate marks and remarks



Other "STUFF"

- Error rate directly correlates to credibility
- Use Tables if data complicated
- Use **bold face**, *italics*, underline appropriately

TYPES OF REPORTS

- 1.) Workers' Compensation
 - a.) Impairment – Guides
 - b.) Disability – Missouri 400-week model
 - c.) FECA – Postal workers
 - d.) FELA – Railroad workers
 - e.) Jones Act – Casino/Longshore workers
- 2.) Disability Determinations

TYPES OF REPORTS (con't)

- 3.) Division of Family Services (MO)
- 4.) Vocational Rehabilitation (MO)
- 5.) Personal Injury – No rating

Handouts

- AADEP Analysis
- Three IME reports

ANDREY FELLOWSHIP CASE REPORT KEYFINDER'S ANALYSIS			
Case Report #	Date	Casefile	Physician's point
<p>1. PHYSICAL EXAMINATION AND HISTORY OF PRESENT ILLNESS (20%)</p> <p>A. Weight, height, vital signs, weight (2%)</p> <p>B. Skin (2%)</p> <p>C. Eyes (2%)</p> <p>D. Ears, nose, throat (2%)</p> <p>E. Heart (2%)</p> <p>F. Lungs (2%)</p> <p>G. Abdomen (2%)</p> <p>H. Genitalia (2%)</p> <p>I. Neurological (2%)</p> <p>J. Musculoskeletal (2%)</p> <p>K. Other (2%)</p>			
<p>2. MEDICAL HISTORY AND PHYSICAL EXAMINATION (20%)</p> <p>A. Past medical history (2%)</p> <p>B. Past surgical history (2%)</p> <p>C. Past medical history (2%)</p> <p>D. Past surgical history (2%)</p> <p>E. Past medical history (2%)</p> <p>F. Past surgical history (2%)</p> <p>G. Past medical history (2%)</p> <p>H. Past surgical history (2%)</p> <p>I. Past medical history (2%)</p> <p>J. Past surgical history (2%)</p> <p>K. Past medical history (2%)</p> <p>L. Past surgical history (2%)</p> <p>M. Past medical history (2%)</p> <p>N. Past surgical history (2%)</p> <p>O. Past medical history (2%)</p> <p>P. Past surgical history (2%)</p> <p>Q. Past medical history (2%)</p> <p>R. Past surgical history (2%)</p> <p>S. Past medical history (2%)</p> <p>T. Past surgical history (2%)</p> <p>U. Past medical history (2%)</p> <p>V. Past surgical history (2%)</p> <p>W. Past medical history (2%)</p> <p>X. Past surgical history (2%)</p> <p>Y. Past medical history (2%)</p> <p>Z. Past surgical history (2%)</p>			

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Thank You

•Questions?????

