New Workers' Compensation Patient Intake Checklist

For Independent Practice Physicians – Florida

## 1. Initial Verification

- [ ] Confirm injury is work-related

- [ ] Obtain claim number, date of injury, and insurance carrier contact info

- [ ] Verify authorization from the employer or insurance carrier

- [ ] Confirm your practice is an authorized treating provider

## 2. Patient Information Intake

- [ ] Full name, date of birth, and contact information

- [ ] Employer name, address, and contact information

- [ ] Injury details: date, time, location, and how it occurred

- [ ] Body part(s) affected

- [ ] Prior injuries or similar conditions

## 3. Insurance & Case Details

- [ ] Workers’ compensation insurance carrier name and phone number

- [ ] Adjuster or case manager name, phone, and email

- [ ] Employer’s WC contact or HR rep (if applicable)

- [ ] Obtain copy of authorization letter or email

## 4. Medical Documentation

- [ ] Previous treatment records (if any)

- [ ] Imaging or diagnostic test results (if already completed)

- [ ] Signed medical release form for records from prior providers

## 5. Forms to Complete

- [ ] DWC-25 – Initial Visit form (submit within 3 business days)

- [ ] CMS-1500 – Billing form (submit after services rendered)

- [ ] Internal consent and new patient intake forms

## 6. Physician Evaluation

- [ ] Document detailed history of injury and mechanism

- [ ] Perform thorough physical exam

- [ ] Document ICD-10 diagnosis codes

- [ ] Determine work status and list specific restrictions

- [ ] Outline initial treatment plan

- [ ] Schedule follow-up visit

## 7. Communication and Submission

- [ ] Submit DWC-25 to carrier and employer (if applicable)

- [ ] Provide work status note to patient and employer

- [ ] Send CMS-1500 with supporting documents to carrier

- [ ] Notify adjuster/case manager of any urgent issues

## 8. Internal Follow-Up

- [ ] Log patient into WC case tracking system

- [ ] Set reminders for DWC-25 updates at each visit

- [ ] Flag file for future MMI or impairment rating evaluation

- [ ] Assign office staff to monitor case communications