

# OrthoCarolina

## Criteria for Special Exams

Criteria for a Special Exam is as follows:

- The date of injury is six months or greater.
- The patient has been treated by another orthopedic physician.
- The patient has had surgery.
- The OC physician leaves it to the discretion of the requesting party as to who should evaluate.
- The requesting party wants a physician that is not the same physician requested by the treating OrthoCarolina physician.

The steps to set up a Special Exam are as follows:

- Request comes to the Industrial Services Department.
- Check list is emailed to the requesting party.
- Check list, cover letter or NCIC questionnaire with the appropriate questions marked and medicals are received by fax (704-323-2007). If greater than 25 pages, the requested items should be mailed.
- Invoice for \$1000 is faxed/emailed to the requesting party.
- Simultaneously, the medicals are sent to the physician to review, if this is their preference.
- Check is received, date and check number is noted on check list.
- Special Exam appointments are made promptly when check is received, if the physician has approved appointment.
- Appointments must be made in Special Exam slots and indicate if IME (Independent Medical Exam), CSO (Comprehensive Second Opinion) or routine 2<sup>nd</sup> opinion (which is not a pre-pay) in the "body part" space of Centricity. This is based on the requesting letter or the NCIC check list.

A Special Exam requires a pre-payment of \$1000. This is due prior to the appointment being scheduled. Also our check list must be completed and returned with the medicals and a cover letter or the NCIC questionnaire at the time of the request. In some cases these will be sent to the doctor for review prior to an appointment being scheduled, even if the pre-payment is received. Not all of our doctors who do Special Exams require this step, but the majority does.

If the request falls within these guidelines and it is for a one time exam only without treatment, then it is scheduled as an IME (Independent Medical Exam). If the request is for evaluation and treat, then it is scheduled as a CSO (Comprehensive Second Opinion). This must be designated in the letter from the requesting party.

If the date of injury is less than six months, with the exception of Concentra/Occupational Health referral which is a year, and the patient has not had surgery, or been seen by another orthopedist, the appointment is scheduled as a Routine 2<sup>nd</sup> Opinion. This exam does not require a pre-payment, but we do still require the medicals and a cover letter. This can be for a one time evaluation or for transfer of care.

Different doctors want Special Exams and Routine 2<sup>nd</sup> Opinions scheduled a little differently. Some want more time allowed for a Special Exam than for a Routine 2<sup>nd</sup> Opinion. We must follow their preference.

A change of condition is when the appt is greater than 1 year after release. The physician must approve the appt and the charge is a pre-pay of \$400.