

# Quality Review Tips!



Logically Contact Information Business Hours (Monday through Friday 8:00am-5:00pm ET) 1-(866)-946-9638

option 1, Access Pin 221 After Hours, Holidays & Weekends 1-(919) 856-2300 option 1

Vacation Requests- Please send to [referralteam@bbabsence.com](mailto:referralteam@bbabsence.com)

Concerns/Comments/Requests Please send to [referralteam@bbabsence.com](mailto:referralteam@bbabsence.com)

## August 2023

### AP Contact

**\*\*As a reminder, please include the specialty of the treating provider (s) in the documents reviewed section of your report.**

#### Why:

AP contact is a critical part of any disability insurer (Carrier) claim review. These steps facilitate a thorough and timely review of an individual's application for disability benefits, with mandated due diligence for obtaining as much information as possible from the treating providers.

- Carriers look for a discussion between yourself and the AP on your respective opinions of the claimant's functional capacity and the evidence to support each. Points of agreement/ disagreement should be thoroughly explored. The purpose is to present and understand one another's conclusions allowing the AP the added opportunity to support his/her opinion directly.
- Carriers look for consultants to pose questions to the AP regarding the claimant's symptoms, the providers findings and treatment as it relates to the claimant's functional status and prognosis. Questions regarding treatment need to be approached from the perspective of acceptable standard of care.
- Carriers may request to contact an AP even in the absence of any documentation in the medical records received.
  - If this occurs, you may ask them when they have last seen the claimant, if the claimant is in active treatment with them, diagnosis and if they have opinion on R/Ls for the period in question.

#### When:

The Referral AND the Specifications are both key to determining when you need to call any given AP in any case. Note: We have heard your interest for us to state need for an AP call in each case referral email. The amount of detail to be considered for each Carrier's unique requirements unfortunately makes this impractical right now. We will continue to look for ways to make this easier.

- Individual Carrier Specifications detail their distinct requirements and define the circumstances under which you should call, the necessary number of attempts to be made, as well as specific documentation to include in your report. Specifications are constantly in flux as Carriers adjust their individual expectations based on their unique business needs. These documents have all been recently updated to cite the key points for the specific Carrier at the start of the document. The referral from the Carrier should note Attending Physician(s) to be contacted, if applicable. Please reach out to [referralteam@bbabsence.com](mailto:referralteam@bbabsence.com) if AP names and or numbers are not provided or incorrect.
- If there is no AP contact information provided on the referral, then AP calls are not applicable.
- AP contact information on the referral may be provided when a letter (not a call) is required. Always check the particular Client/ Carrier Specifications.

### **Can Consultants contact Claimant's Attending Physician via text and email?**

- Due to security and privacy purposes, currently only telephonic communications are approved between consultants and treating providers for direct case discussions.
- Please avoid emailing, texting, or faxing APs. It is critical that no personal or private information (including any case numbers) is shared in the email, only the Brown and Brown Absence case.
- In cases where the AP offers to fax more recent medical records, those records need to be faxed to our referral team, so they become part of the whole record.

### **How do I know if AP calls, and letters are really necessary?**

- Check the Specifications. The Specifications have all been recently updated to cite the key points for the specific Carrier at the top of the document.
- The referral from the Carrier will note Attending Physician contacts and contact numbers.
- A referral may indicate more than one Attending Physician to contact.

### **How many attempts do I make to contact an Attending Physician?**

- Check the Specifications. The Carrier specifications for AP calls, describes what circumstances AP calls are required and the number of call attempts needed
- Some Carriers prefer questions for the AP if no contact is successful, Check the client Specifications
- Make the required # of attempts, per the Specifications only; you are not expected to stay on hold for more than a few minutes.

### **What if there is no AP phone number or a wrong number?**

- Please reach out to Brown and Brown Absence referral team who will reach out to the Carrier to obtain the appropriate contact information.

### **What do I need to document for AP calls?**

- Date and time of call (s).
- Who you spoke with and who received the message (s).

- Content of the call with details. The Carriers are interested in seeing a two-way discussion between you and the AP.
- In some cases, if you do not reach the AP, document a list of questions that you would have asked the AP if you had the opportunity to discuss the case. This is specific to certain Carriers so please check the Carrier specifications for directions.

**PLEASE NOTE:**

***\*\*\* Contacting the AP without direct authorization to do so may present legal concerns for the Carrier.***

***\*\*\* If you are ever unsure about making an AP call, please check with a Brown & Brown QR team member. \*\*\****

Look for our next tip in the upcoming weeks.

We hope this has been helpful and we welcome your feedback and questions.

Thank you,

The QR Team