

# 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)

## May 2023

### Co- Reviewer Contact

#### What is the purpose?

- A Carrier's referral may request reports from two (or more) specialty reviewers to ensure the claimant's conditions have been considered individually and in totality.
- The intention of a Co-Reviewer conference call is to confirm that the claimant's overall functionality has been discussed from each perspective /specialty and that any disagreement is acknowledged.

#### What are the expectations?

- The expectation is that each reviewer considers the file related to the conditions within their specialty, then conduct a call with the Co-Reviewer to discuss the case.
- Each reviewer is expected to share their assessment and opinion from the perspective of their specialty. Disagreements should be discussed only one reviewer should comment on any one condition to avoid discrepancies.

#### What needs to be documented?

- Each reviewer will document date and time of call (dates and times must match), Co-Reviewer name and specialty in their respective reports.
- A brief summary of discussion should be stated. Please do not cite another reviewer's opinion (it is apparent in their respective report). Examples:
  - 'The case was reviewed in its totality, and we shared our respective opinions. No disagreement was noted.'
  - 'The case was reviewed in its totality, and we shared our respective opinions. After full discussion, it was agreed that (specialty) reviewer would address the claimant's (i.e., cite the specific condition). Agreement was reached on the claimant's overall capacity.'

#### What if we disagree?

- Disagreements should be reconciled if possible and if not, then acknowledgement should be noted.

- If reviewers disagree regarding capacity related to the same condition, the reviewers must discuss the details and agree which specialist will address the condition in question, with one reviewer deferring to their colleague to opine on the condition in question. For example, the neurology reviewer and IM reviewer differ in their opinions regarding the impact of headaches on a claimant's capacity. The opinion should be deferred to the neurologist.
- Example of a documented Co-Reviewer disagreement: "On 7/17/2022 at 12:16 PM EST, I spoke with Dr. X. The duration of the phone call was 9 minutes. We discussed our respective opinions. There was consensus on functional status in totality in that we both opined that claimant had restrictions/limitations. The only area of disagreement was related to the claimant's ability to bend, stoop, kneel, crouch, or crawl. I opined that from a neurology perspective the claimant could perform those activities occasionally based on \_\_\_\_\_. Dr. X opined that from the perspective of gastroenterology that the claimant could never perform these activities but stated that she was taking non-neurological conditions into account. Whether a non-neurological condition would result in these restrictions/limitations is out of my realm of expertise and therefore, I could not opine whether I agreed or disagreed with this opinion. There were no other areas of disagreement. "

#### **What if I can't get a hold of the co-reviewer?**

- Please contact the Referral Team/ QR Team as soon as possible and we will reach out to your peer reviewer. Completed reports must document that Co-Reviewer contact was established.
- Please be respectful of your Co-Reviewer, their schedules and report deadlines.
- Remember only telephonic contact is approved for case discussions.

***We would love to hear from you on any topics for the QR tips that you feel we should address.***

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

Bobbie	<a href="mailto:bahern@bbabsence.com">bahern@bbabsence.com</a>	207-747-4311
Julie	<a href="mailto:jmatula@bbabsence.com">jmatula@bbabsence.com</a>	207-747-4314
Tracy	<a href="mailto:Tbassett@bbabsence.com">Tbassett@bbabsence.com</a>	207-747-4342
Robin	<a href="mailto:rthatcher@bbabsence.com">rthatcher@bbabsence.com</a>	
MaryAnne	<a href="mailto:mtranfaglia@bbabsence.com">mtranfaglia@bbabsence.com</a>	207-835-0049