

# Plan of Action and Next Review Date

*Simulated training document only — not an official or live claim file.*

## Plan of Action Timeline

| POA Date   | Key Action Items   |
|------------|--|
| 09/24/2024 | 1) Confirm coverage and employment with Evergreen Wellness HR; obtain incident and witness statements.<br>2) Ensure initial diagnostics and treatment are authorized through the MPN, including X-rays and request for left knee MRI if symptoms persist.  |
| 11/15/2024 | 1) Follow up on MRI results and orthopedic consult to determine need for knee surgery.<br>2) Issue delay/partial denial notices regarding newly alleged right shoulder and psych components while investigation continues.<br>3) Consider need for Psych QME panel if psych claim continues to be alleged.                                 |
| 01/15/2025 | 1) Post-surgery (01/10/2025), continue to authorize medically necessary post-operative care including PT.<br>2) Maintain TTD benefits while employee remains off work; monitor for transition to modified duty.<br>3) Reevaluate reserves once surgery costs and rehab duration are clarified.   |
| 03/10/2025 | 1) Confirm employer's ability to accommodate modified duty effective 03/01/2025 and obtain RTW verification.<br>2) Continue conservative care for lumbar spine and post-op knee rehab with goal of MMI.<br>3) Follow up on status of Psych QME and confirm whether psych treatment will be requested or denied.                            |
| 04/15/2025 | 1) Review PTP P&S/MMI report dated 04/10/2025; request any needed clarifications.<br>2) Open PD file and begin preliminary rating analysis; consider AME to address causation/apportionment and right shoulder dispute.<br>3) Confirm SJDB status based on employer's permanent modified work offer potential.                             |
| 06/25/2025 | 1) Review Ortho AME report dated 06/20/2025 regarding apportionment, right shoulder causation, and future medical.<br>2) Adjust PD estimate and reserves based on AME findings; initiate PD advances consistent with estimated rating.<br>3) Coordinate with defense counsel to evaluate settlement range and begin informal negotiations. |
| 09/30/2025 | 1) Continue PD advances pending DEU rating and/or settlement.<br>2) Confirm employer continues to accommodate permanent restrictions and no job changes affect SJDB entitlement.<br>3) Work with defense counsel to prepare for rating MSC and potential resolution via Stipulated Award or C&R.   |

## Next Planned Review Date

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| Next POA Review | 02/01/2026 – targeted date to reassess settlement posture, reserve adequacy, and any new medical or employment developments. |
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