

# Adjuster Activity Log / Claim Notes

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

## Activity Log

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09/13/2024 09:10 JP - NEW LOSS INTAKE

- New claim reported by Evergreen Wellness HR (E. Santos) for 09/12/2024 stairwell incident.
- Employee: Nicole Moore, 37, Residential Counselor.
- Body parts: low back, left hip, left knee.
- Confirmed specific date of injury 09/12/2024 at about 19:15.
- Directed employer to provide DWC-1 to employee and send first report to TPA.
- Opened Claim 25004567; status: pending investigation and acceptance.

09/24/2024 10:22 JP - COVERAGE / EMPLOYMENT VERIFICATION

- Coverage confirmed with WestShield Employers' Safety Group, member Evergreen Wellness Center.
- Membership effective 01/01/2017 to present; no lapse.
- HR confirms hire date 06/10/2019; full-time 40 hours/week.
- Employee active on DOI; no concurrent employment reported.

09/24/2024 14:05 JP - MEDICAL RECORD REVIEW

- Reviewed PrimeCare first visit 09/13/2024: acute lumbar strain, left hip strain, left knee contusion.
- X-rays negative for fracture; mild degenerative changes noted in lumbar spine.
- PTP off-work note: TTD with referral for PT and possible MRI.

10/03/2024 09:30 JP - INITIAL COMPENSABILITY

- Mechanism consistent and supported by employer and medical records.
- Issued Notice of Acceptance for: lumbar strain, left hip strain, left knee contusion/internal derangement.
- Set initial reserves: medical \$18,000; indemnity \$8,000; expense \$3,500.

10/07/2024 11:18 JP - CLAIMANT RECORDED STATEMENT

- Obtained full recorded AOE/COE statement from Nicole Moore.
- Description matches employer report: resident stopped and pulled back, causing near-fall and lurch forward.
- No prior left knee or hip injuries; prior lumbar claim in 2018 acknowledged.
- Long-standing anxiety treated by PCP; no prior industrial psych claim.

10/12/2024 13:40 JP - MRI UPDATE

- Left knee MRI (10/12/2024) shows complex medial meniscus tear, small effusion, mild chondromalacia.
- Confirms internal derangement, consistent with mechanism and physical exam.

10/29/2024 15:20 JP - NEW BODY PART ALLEGATIONS / REPRESENTATION

- PTP PR-2 dated 10/21/2024 adds right shoulder soreness and psych complaints (anxiety/insomnia).
- Employee retains applicant attorney Maria Perez, Esq.; notice received 10/29/2024.
- Claim now litigated.

11/01/2024 10:12 JP - DELAY NOTICE

- Issued delay / investigation notice for right shoulder and psych claims.
- Accepted body parts remain admitted.
- Decision due date set for 12/11/2024.

11/18/2024 16:18 JP - ORTHO CONSULT

- Ortho Dr. Patel recommends left knee arthroscopy due to symptomatic medial meniscus tear.
- Surgery authorized along with post-op PT; reserves increased.

12/10/2024 11:30 JP - PARTIAL DENIAL

- AOE/COE investigation and available records do not support separate right shoulder or compensable psych injury.
- Partial denial issued: right shoulder and psych denied; lumbar, left hip, and left knee remain accepted.

01/10/2025 12:05 JP - SURGERY

- Left knee arthroscopic partial medial meniscectomy and chondroplasty completed without complication.
- Employee remains TTD post-op; continue benefits.

03/01/2025 09:40 JP - MODIFIED DUTY

- PTP clears modified duty effective 03/01/2025 with restrictions on lifting, stairs, and restraints.
- Evergreen Wellness confirms accommodated desk-based/light duty assignment.
- TTD ends 02/29/2025.

03/20/2025 15:05 JP - PSYCH QME

- QME Dr. Singh (Psychology) finds <10% industrial contribution; predominant pre-existing psychological factors.
- Supports denial of psych claim.

04/10/2025 13:30 JP - P&S/MMI

- PTP Dr. Nguyen declares P&S/MMI as of 04/10/2025 with residual lumbar and left knee impairment.
- Left hip resolved without ratable impairment.

05/30/2025 14:55 JP - ORTHO AME EXAM

- AME Dr. Chen confirms AOE/COE for lumbar and left knee; left hip strain resolved.
- Apportionment: 70% to current DOI, 30% to prior lumbar injury/degeneration.
- Does not support industrial right shoulder impairment.

12/11/25, 11:04 AM

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06/20/2025 11:20 JP - RESERVES / PD ESTIMATE

- Updated PD estimate to low-to-mid-teens range based on AME.
- Medical reserve reduced to \$20,000; indemnity \$15,000; expense \$8,500.
- Total incurred approximately \$43,500 with about \$32,780 paid.

07/10/2025 10:05 JP - PD ADVANCES

- Began PD advances at \$290/week based on estimated PD rating.
- First advance issued 07/10/2025.

09/30/2025 15:40 JP - FILE REVIEW / SETTLEMENT

- Employee working permanent modified duty on first-floor unit; employer accommodating restrictions.
- SJDB voucher not due at this time.
- Settlement discussions underway; case postured for Stipulated Award versus modest C&R.