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THE STATE OF SOUTH CAROLINA
In the Court of Appeals

APPEAL FROM SOUTH CAROLINA
WORKERS' COMPENSATION COMMISSION

RECEIVED

Appellate Case No. 2014-001788

MAR 08 2016

SC Court of Appeals

Clarence Winfrey, Employee, Claimant, Respondent,

v.

Archway Services, Inc., Employer,
and American Fire & Casualty Insurance
Company c/o Liberty Mutual Group, Carrier, Appellants.

MOTION TO COMPEL MEDICAL CARE
PURSUANT TO AWARD OF THE COMMISSION AND SC CODE §42-17-60

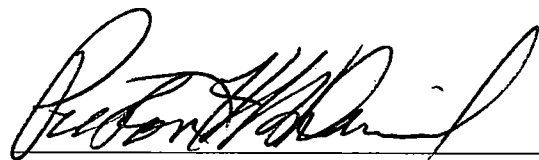
TO: MR. BRETT BAYNE, COUNSEL FOR THE APPELLATE

YOU WILL PLEASE TAKE NOTICE that ten (10) days from the date of the service hereof or as soon thereafter as Counsel for the Claimant/Respondent may be heard, or at such other time as designated by the Court (hereinafter Claimant), Claimant's Counsel, the Respondent before the Court, will move for an Order of the Court pursuant to SC Code Ann. §42-17-60 compelling the provision of medical care pursuant to the Award of the SC Workers' Compensation

Commission as originally entered by Commissioner Susan Barden on February 27, 2014, and affirmed the Full Commission by Order and Award issued and filed on July 24, 2014. The Defendants, the Appellants in this Court (hereinafter Defendants), filed a Notice of Intent to Appeal the Award of the Workers' Compensation Commission on August 20, 2014 and jurisdiction lies in this Court. The Motion to Compel Payment of Medical Care pursuant to the Award of the Commission and §42-17-60 is based upon the Memorandum of Law attached hereto and incorporated herein by reference.

Because of the urgency of this medical care and the provision of this medical care, the Movant would respectfully request a hearing on this matter as soon after the ten (10) days for Reply has run as is possible.

I SO MOVE.



Preston F. McDaniel, Esquire
MCDANIEL LAW FIRM
1315 Elmwood Avenue
Columbia, South Carolina 29201
(803) 771-7211

Attorney for Respondent/Claimant

March 4, 2016

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MEMORANDUM IN SUPPORT OF
MOTION TO COMPEL MEDICAL CARE
PURSUANT TO AWARD OF THE COMMISSION AND SC CODE §42-17-60

The Movant would respectfully show unto the Court as follows:

1. That the Hearing Commissioner issued her Award of benefits on February 27, 2014 and in that Award of benefits she specifically provided that:

"IT IS FURTHER ORDERED that the Claimant having been found to have sustained compensable injury specifically to include injury to his heart, the Claimant is to receive medical care for all injuries and conditions stemming from the accident that occurred in this matter and specifically to

include all conditions related to the heart as found to be causally related by the authorized treating physicians which are hereby declared to be Dr. Jeffrey A. Travis and Dr. Lanneau D. Lide. The Defendants reserve the right to contest the compensability of any injury or condition opined to be related to the injury involving any bodily part, member, organ or system and the right to direct the treatment for all causally related medical problems outside of the area of expertise of the two (2) authorized treating physicians including the right to choose authorized treating physicians to provide that medical care."

2. That the Award of benefits and specifically as to the medical benefits provision was affirmed after review by the Full Commission which affirmed and entered the Award as the Award of the Commission by Order dated July 25, 2014.

3. That on August 20, 2014, the Defendants filed an appeal to that Award of benefits on August 20, 2014, thus rendering jurisdiction over this matter with the Court.

4. That SC Code §42-17-60 (as amended, effective July 1, 2007), provides:

"In the case of an appeal from the Decision of the Commission on questions of law, the appeal does not operate as a supersedes and, after that time the employer is required to make weekly payments of compensation and to provide medical treatment ordered by the Commission involved in the appeal, or certification, until the questions at issue have been fully determined in accordance with the provisions of this Title" (Emphasis added).

5. That pursuant to the provisions of SC Code §42-17-60 the Defendants, initially instituted treatment

through the authorized treating doctors for the Claimant's heart related problems and provided treatment through Dr. Travis and Dr. Lanneau Lide and such other medical providers as they deemed appropriate to treat the heart-related problems. During the course of that treatment, the Defendants, hired an independent agent rehabilitation company and nurse to coordinate the medical care, Mr. Howard Altman, RN, BSN, Field Case Manager, Genex Services, Inc.

6. That at the direction of the authorized treating physician, Dr. Lanneau Lide, the Claimant was referred to the Medical University of South Carolina for treatment of his heart related problems to include evaluation concerning a heart transplant. All medical care with the Medical University of South Carolina was authorized and scheduled by the Defendants at the request and direction of Dr. Lide. After evaluation and treatment by the doctors at MUSC, it was determined that the Claimant needed repair of a leaking valve with possible replacement. (This is according to the medical records provided to Claimant's Counsel and the reports received from the Field Case Manager, Mr. Howard Altman, RN.) (Note: according to the reports from Mr. Altman, the authorized field case manager, in addition to Mr. Altman and the adjuster, who upon information and

belief is Elizabeth Wrinkle with Liberty Mutual Insurance Co., Defense Counsel is involved in the decisions in reference to medical care which under the Award is a claims administration issue.)

7. That according to the records provided by the assigned rehabilitation nurse, Dr. Ikonomidis at MUSC On January 5, 2016 determined that the Claimant needed a valve repair and possible replacement and wanted to perform that surgery within one week was in the process of scheduling that surgery. As part of that surgical preparation, according to the medical records and the reports of the assigned Rehabilitation Nurse, the doctors requested that a dental evaluation be performed to clear him for the surgery.

8. That thereafter based on a verbal report from the Claimant, Claimant's Counsel was advised that it was his understanding that the Defendants were not authorizing the dental appointment necessary for the surgery to be scheduled. Inquiry was made by Claimant's Counsel pursuant to the emails attached hereto and incorporated hereby by reference, as to the scheduling of a dental appointment necessary for the surgery. Subsequent thereto and after no response, Claimant's Counsel received a monthly report for the period January 08, 2016 to February 06, 2016 from the

assigned Rehabilitation Nurse indicating that a conference call had been held between Defense Counsel, the Adjuster and the Rehabilitation Nurse and that the surgery was not being authorized until after depositions of the doctors, and that they were not authorizing the dental examination. A copy of that report is attached hereto and incorporated herein by reference. See entry February 1, 2016.

9. That almost simultaneously and also subsequent thereto, Counsel for the Claimant contacted Defense Counsel to determine the basis for the refusal to provide medical care pursuant to the Award of the Commission by the doctors that had been chosen and authorized to provide that medical care by the Defendants through MUSC. Inquiry was also made as to the dental appointment and to why it was not being authorized.

Subsequent thereto, Counsel received a series of emails from the assigned Rehabilitation Nurse and Nurse Coordinator at the SC Heart and Valve Center stating that the purpose of the dental examination was to have Mr. Winfrey examined to determine whether or not there was any infection, to clear any infection, and to then certify to the Heart Valve Center prior to surgery that the Claimant had no oral infection. A copy of those emails are attached hereto and incorporated herein by reference.

10. That Counsel for the Claimant inquired of the Defendants as to the basis for the denial of both the dental appointment and also refusal to schedule the surgery. Counsel for the Claimant specifically requested the medical opinion and/or any statement from the treating doctor upon which the Defendants were relying and specifically to set forth the specific basis for refusal to provide this medical care. Counsel for the Claimant advised that to his knowledge that neither of the authorized treating physicians nor any medical provider has made a statement that would result in the refusal of this medical care. Eventually Counsel for the Defendants replied that the reason that they were denying the medical care is that, "because the matter is still disputed as to causation and compensability, we will need to take the depositions of the necessary doctors prior to the approval of any surgery." As is set forth in the Affidavit, Counsel for the Claimant has been made aware of no medical opinion or basis or any basis for the refusal of this medical care. This is medical care that has been awarded by the Commission and the Defendants are currently required by that Award and §42-17-60 to pay for that medical care and specifically under the provisions of the Award which provides that:

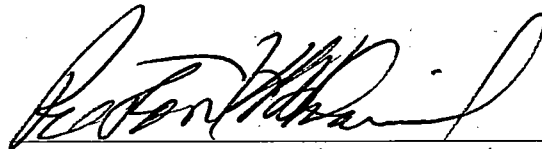
"Specifically to include all conditions

related to the heart as found to be causally related by the authorized treating physicians Dr. Jeffrey A. Travis and Dr. Lanneau D. Lide."

There is absolutely no opinion or nor any statement nor has the Claimant been provided with any statement from any of the treating authorized doctors that this medical care is not causally related. The Defendants referred the Claimant to MUSC per the recommendation of Dr. Lide for causally related medical care due to his heart condition and up until the surgery have authorized all evaluations and treatment by MUSC.

Wherefore, the Claimant would respectfully request an Order of the Court directing the Defendants to immediately provide the medical as recommended by the doctors at MUSC, specifically to include the dental examination needed to clear the Claimant for surgery and to provide the surgery as soon as possible, for the costs of this action and for such other relief as the Court deems appropriate.

Respectfully submitted,



Preston F. McDaniel, Esquire
MCDANIEL LAW FIRM
1315 Elmwood Avenue
Columbia, South Carolina 29201
(803) 771-7211
Attorney for Respondent/Claimant

March 4, 2016

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Company c/o Liberty Mutual Group, Carrier, Appellants.

PROOF OF SERVICE

I certify that I have served the MOTION TO COMPEL MEDICAL CARE with MEMORANDUM IN SUPPORT, and AFFIDAVIT OF PRESTON F. MCDANIEL by depositing a copy of it in the United States Mail, postage prepaid, on March 4, 2016 addressed to:

Brett H. Bayne, Esquire
McAngus, Goudelock & Courie
Post Office Box 12519
Columbia, SC 29211.

Dated: March 4, 2016



Preston F. McDaniel
MCDANIEL LAW FIRM
1315 Elmwood Avenue
Columbia, South Carolina 29201
(803) 771-7211

Attorney for Respondent

McDANIEL LAW FIRM
ATTORNEYS AND COUNSELORS AT LAW
1315 ELMWOOD AVENUE
COLUMBIA, SOUTH CAROLINA 29201

Proudly representing injured workers
for over 30 years.

Preston F. McDaniel

Telephone (803) 771-7211

Matthew Robertson

Facsimile (803) 252-0709

March 4, 2016

RECEIVED

AND VIA FACSIMILE - 734-1839
AND US MAIL
Jenny Abbott Kitchings
Clerk of Court
SC Court of Appeals
Post Office Box 11629
Columbia, South Carolina 29211

MAR 08 2016

SC Court of Appeals

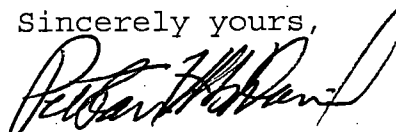
RE: Clarence Winfrey, Employee, Respondent, v. Archway
Services, Inc., Employer, and American Fire &
Casualty Insurance Co., Carrier, Appellants.
Appellate Case No. 2014-001788

Dear Ms. Kitchings:

Please find attached a Motion to Compel Medical Care pursuant to the Award of the Workers Compensation Commission and the provisions of SC Code §42-17-60. The Defendants, while authorizing medical care through MUSC, have now abruptly refused to provide and authorize the surgery recommended by MUSC and a dental exam that is necessary to clear Mr. Winfrey for that surgery. According to my understanding, my client's condition is deteriorating and this care needs to be accomplished as soon as possible. For those reasons, I would specifically request a hearing as soon as is possible after the ten (10) days date for response runs pursuant to Rule 240(j). Pursuant to Rule 262, we are filing and serving this by mail and also pursuant to Rule 262(2), sending and filing a facsimile copy with the Court to expedite a hearing in this matter. Although not required, we are also emailing a copy of this document to Defense Counsel. The required \$25.00 filing fee and the appropriate Affidavits of Service are also enclosed.

I look forward to the hearing in this matter.

Sincerely yours,



Preston F. McDaniel

PFM/kth/abh
Enclosures

cc: Brett H. Bayne, Esquire (via email brett.bayne@mgclaw.com and US Mail)

Kim Hinkle

From: Brett Bayne <brett.bayne@mgclaw.com>
Sent: Thursday, February 25, 2016 10:30 AM
To: Andrea Ham
Cc: 'Kim Hinkle'
Subject: RE: Clarence b. Winfrey v. Archway Service, Inc.

Preston,

Because the matter is still disputed as to causation and compensability, we will need to take the depositions of the necessary doctors prior to the approval of any surgery. We have been working to get dates for those depositions with those doctors.

I will check with Howard on the dental issue. As I said, my understanding was that it was just a routine annual exam that they needed. If that is the case, Liberty will not approve it. However, if it is a specialized exam needed, then I will discuss it with Liberty and I imagine it would be approved.

Brett

From: Andrea Ham [<mailto:aham@pfmcdlaw.com>]
Sent: Wednesday, February 24, 2016 11:44 AM
To: Brett Bayne
Cc: 'Kim Hinkle'
Subject: RE: Clarence b. Winfrey v. Archway Service, Inc.

NOTE FROM PRESTON (He is in hearings in Florence today.)

Brett,

Your clients are paying pursuant to 42-17-60 which is the same as a final award of the Commission during Appeal. There is nothing pending that would allow for a deposition. If your client is denying any of the medical care, please let me know in writing the basis for the denial. At this point this is a claims administration issue. As far as I know, the authorized treating physician referred Clarence to Charleston for causally related heart related treatment. There is nothing to the contrary but if your clients have something from Dr. Lide or Dr. Travis let me know. Clarence's condition is getting worse and he could die if he doesn't get treatment soon. Also, please confirm with Howard, but my understanding is the reason for the dentist is to make sure he has no bacterial infection that could kill him. Look to hear from you.

Preston

From: Brett Bayne [<mailto:brett.bayne@mgclaw.com>]
Sent: Tuesday, February 23, 2016 2:38 PM
To: Andrea Ham
Cc: 'Kim Hinkle'
Subject: RE: Clarence b. Winfrey v. Archway Service, Inc.

Preston,

To globally address your concerns:

- 1) Prior to authorization of surgery, I will be deposing Dr. Ikonmidis and Dr. Van Bakel. I am working to obtain dates of those depositions.
- 2) Clarence will need to go see a dentist for a routine checkup. This is not approved by the carrier as it is a routine preventative maintenance visit and nothing specially to be done related to the surgical recommendation. In other words, this is just his annual dental cleaning/visit that we all do.
- 3) I have no idea why Medicare is getting billed. I assume you would need to take that up with MUSC billing.

Please let me know if you have any questions.

Brett

From: Andrea Ham [<mailto:aham@pfmcdlaw.com>]
Sent: Tuesday, February 23, 2016 1:22 PM
To: Brett Bayne
Cc: 'Kim Hinkle'
Subject: Re: Clarence b. Winfrey v. Archway Service, Inc.

This email is being sent at the request of Preston McDaniel.

Thank you,
Andrea Ham
McDaniel Law Firm
(803)771-7211



Brett Bayne, Attorney
brett.bayne@mgclaw.com
1320 Main Street, 10th Floor
Columbia, SC 29201
Main:803-779-2300 | Direct:803-227-2281 | Fax:803-748-0526
VCARD | BIO

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Please consider the environment before printing this email.

Andrea Ham

From: Brett Bayne <brett.bayne@mgclaw.com>
Sent: Tuesday, February 23, 2016 2:38 PM
To: Andrea Ham
Cc: 'Kim Hinkle'
Subject: RE: Clarence b. Winfrey v. Archway Service, Inc.

Preston,

To globally address your concerns:

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- 3) I have no idea why Medicare is getting billed. I assume you would need to take that up with MUSC billing.

Please let me know if you have any questions.

Brett

From: Andrea Ham [<mailto:aham@pfmcdlaw.com>]
Sent: Tuesday, February 23, 2016 1:22 PM
To: Brett Bayne
Cc: 'Kim Hinkle'
Subject: Re: Clarence b. Winfrey v. Archway Service, Inc.

This email is being sent at the request of Preston McDaniel.

Thank you,
 Andrea Ham
 McDaniel Law Firm
 (803)771-7211



Brett Bayne, Attorney
brett.bayne@mgclaw.com
 1320 Main Street, 10th Floor
 Columbia, SC 29201
 Main:803-779-2300 | Direct:803-227-2281 | Fax:803-748-0526
 VCARD | BIO

Kim Hinkle

From: Altman, Howard <Howard.Altman@genexservices.com>
Sent: Thursday, February 25, 2016 11:10 AM
To: brett.bayne@mgclaw.com; Elizabeth.Wrinkle@LibertyMutual.com
Cc: Kim@PFMCDlaw.com
Subject: FW: Clarence Winfrey 22209963

Mr. Bayne,

Below is the email response to the dental exam question to MUSC valve team.

Howard Altman, RN, BSN
Field Medical Case Manager / Charlotte Midlands
Genex Services
O 704.503.4775
C 803.530.9693 (preferred)
F 866.268.3974
TF 800.456.7890
howard.altman@genexservices.com

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Please note in the HIPAA Privacy Rule Standards: "A covered entity is permitted to disclose an individual's protected health information as necessary to comply with and to the full extent authorized by workers' compensation law. See 45 CFR 164.512(I)"

From: Waters, Laura [mailto:watersl@musc.edu]
Sent: Thursday, February 25, 2016 11:04 AM
To: Altman, Howard
Subject: RE: Clarence Winfrey 22209963

The dentist will need to examine Mr. Altman for infection and periodontal disease, this will likely include x-rays. Teeth that show signs of infection will need to be removed prior to surgery. The dentist will need to write an office note stating that Mr. Winfrey is cleared for surgery, meaning that he is free of oral infection.

Laura M. Waters, RN, PCCN
Nurse Coordinator, Research & Patient Care
South Carolina Heart Valve Center
Medical University of South Carolina
25 Courtenay Drive
ART 1221 MSC 211
Charleston, SC 29425
p: 843-876-5981
f: 843-792-8594



Changing What's Possible

From: Altman, Howard [<mailto:Howard.Altman@genexservices.com>]
Sent: Thursday, February 25, 2016 10:58 AM
To: Waters, Laura
Cc: brett.bayne@mgclaw.com; Elizabeth.Wrinkle@LibertyMutual.com; Kim@PFMCDlaw.com
Subject: Clarence Winfrey 22209963

Laura,

Dr. Ikonomidis ordered a dental clearance before Mr. Winfrey can pursue the valve replacement surgery recommended. Please clarify exactly what is need for this dental exam. Is it simply an annual-type, routine exam or more in depth? If so please outline exactly what is needed.

Thank you so much for your help.

Howard Altman, RN, BSN
Field Medical Case Manager / Charlotte Midlands
Genex Services
O 704.503.4775
C 803.530.9693 (preferred)
F 866.268.3974
TF 800.456.7890
howard.altman@genexservices.com

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Company c/o Liberty Mutual Group, Carrier, Appellants.

AFFIDAVIT OF PRESTON F. MCDANIEL

I, Preston F. McDaniel, having been duly and properly
sworn, do depose and state:

1. That I am Counsel for the Claimant in the above-
referenced matter. The Records attached to this Affidavit
include reports from Mr. Howard Altman, medical records
received from Mr. Howard Altman, and emails received by my
office from Mr. Howard Altman and/or Mr. Brett Bayne as
part of the normal course of business concerning my

representation of Mr. Winfrey in his workers' compensation claim.

2. That to my knowledge Mr. Winfrey was referred by the designated treating physician, Dr. Lanneau Lide, under the Award of the South Carolina Workers' Compensation Commission to the Medical University of South Carolina for treatment related to his heart condition stemming from his work-related accident. To my knowledge, all medical care and evaluation that has been provided up until the date of this controversy has been scheduled by, authorized by, provided by and paid for by the Defendants in this matter, through Mr. Howard Altman who is the independent, nurse case manager and the agent of the Defendants to provide nurse case management under the Award of the Commission. As far as I knew, and as far as the Claimant was concerned, to my knowledge, the Claimant was evaluated for a heart transplant and then the possibility of a surgery to repair a leaking valve, and then possible needed replacement. I have nothing in my file nor have I been advised by any doctor involved in this situation that this is not related to the heart conditions stemming from the Claimant's work-related accident. I have not received any notification from

Defense Counsel as to any inquiry made to Dr. Lanneau Lide or to Dr. Jeffrey Travis in reference to this medical care.

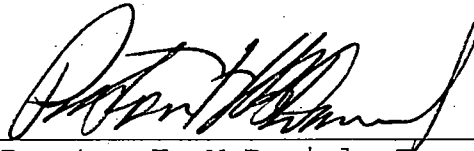
3. That according to my knowledge and as far as I know, to the knowledge of Mr. Winfrey, the doctors at MUSC were contemplating three potential surgeries and were evaluating those three ways to address currently his problems and into the future. Those included a heart transplant, repair of a leaking valve and/or replacement of the valve. The decision was made by the doctors at MUSC that the valve needed to be replaced. Prior to that surgery which was in the process of being scheduled, to my knowledge obtained from Mr. Howard Altman and from the Claimant, the doctors at MUSC wanted to have a dental evaluation performed which was for the purpose of clearing Mr. Winfrey for surgery. The purpose of that dental evaluation is born out by the email received from Ms. Laura Waters, who upon information and belief, is the nurse coordinator for the SC Heart Valve Center at MUSC.

4. That I made inquiry of the Defendants concerning these Claims Administration issues and as to the basis for the refusal by the Defendants to authorize this medical care. The only response that I have received is that the

Defendants continue to dispute, "causation and compensability". No other statement or bases as been given for this abrupt refusal of medical care requested and recommended by MUSC and the physicians there.

According to my understanding obtained from my client, the medical records available and from the reports of Mr. Howard Altman, my client's condition is deteriorating and this surgery needs to be performed as soon as possible. The surgeon originally wanted performed within the week.

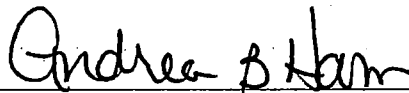
FURTHER THE AFFIANT SAYETH NOT.



Preston F. McDaniel, Esquire
MCDANIEL LAW FIRM
1315 Elmwood Avenue
Columbia, South Carolina 29201
(803) 771-7211

Attorney for Respondent/Claimant

SWORN TO BEFORE ME this
4th day of March, 2016.



(L.S.)

Notary Public for South Carolina

My Commission Expires: 2-27-24



GENEX Services, Inc.
5255 Triangle Parkway, Suite 100
Norcross, GA 30092
770-582-9292 Fax: 1-888-838-0381
www.genexservices.com

Angelia

McDaniel Law Firm
c/o Preston McDaniel, Esq.
1315 Elmwood Avenue
Columbia, SC 29201

*Oct 10 To Nov 8
2015*

Exhibit B



MONTHLY REPORT

Claim #: 22209963 IW Name: Clarence Winfrey
Date of Assignment: 11-May-2015 Current Claims Case Owner: Elizabeth Wrinkle
DOI: 22-May-2013 Report Svc dates: 10-Oct-2015 to 08-Nov-2015

Referral Type: Medical - Field Vendor RN MCM: Howard Altman RN, BSN
Jurisdiction: South Carolina Employer: Archway Service
Attorney's Name: Preston McDaniel Contact Permission: Yes

**Referral objective: Mr. Winfrey's file was received on 11-May-2015 from Beth Wrinkle, CCO with Montgomery Insurance Company, for full case management to coordinate and schedule a neurology appointment to address balance and neuropathic complaints, attend appointments with Cardiologist to determine necessity of identifying a primary care provider at this time, and etiology of anemia and MMI.

Current work status: Not working

Target dates

RTW mod duty: Mr. Winfrey will not likely return to same work.

RTW full duty: Mr. Winfrey will not likely return to same work. Date of Report: November 08, 2015

MMI: To be determined Supplier: unique field CNGTLJ

WC Diagnosis(es):

Primary	Diagnosis Code	Diagnosis Description	Compensable
N	425.4	OTHER PRIMARY CARDIOMYOPATHIES	Y
Y	V45.81	POSTSURGICAL AORTOCOR BYPS STATUS	Y
N	782.0	DISTURBANCE OF SKIN SENSATION	N

Current treatment plan:

On 22-Oct-2015, I attended a follow up appointment with Mr. Winfrey and Dr. Lanneau Lide, Cardiologist. Upon his arrival, I met with Mr. Winfrey in a secluded area of the waiting room. He reported fatigue and, by description, general malaise. He stated he tripped and fell at home two nights ago falling onto his right knee and hitting his left shoulder. He denied any lingering problems related to the fall. He walked with a shuffling gait and was moderately unsteady.



Following a private examination, I met with Mr. Winfrey and Dr. Lide. Dr. Lide reported he would like Mr. Winfrey to be evaluated by the cardiac transplant team at the Medical University of South Carolina in Charleston for recommendations. He explained Mr. Winfrey's heart muscle is weak and his mitral valve leaks causing chronic fatigue and general weakness. He stated the evaluation does not necessarily mean the transplant is imminent but would better inform of the process and timetable. I obtained a copy of the lab work completed on 10-16-15 in Dr. Lide's office. We advised him Mr. Winfrey completed his MRIs and would follow up with Dr. White, Neurologist, on 11-5-15. Follow up with Dr. Lide is scheduled for 1-22-16 at 9:00pm.

LOV 5-Nov-2015, Dr. Marshall White, Neurologist

On 5-Nov-2015, I attended an appointment with Mr. Winfrey and Dr. Marshall White, Neurologist. I met with Mr. Winfrey in a secluded area of the waiting room. He reported fatigue and some increased anxiety related to his upcoming appointment in Charleston for his transplant consultation. We briefly discussed the process reported by Julie at MUSC. He inquired about his appointment with Dr. White, Neurologist, today. We discussed that Dr. White would be completing his evaluation and reviewing his MRIs. Apparently, Mr. Winfrey did not sign in and there was a considerable wait time.

Following a private examination, I met with Mr. Winfrey and Dr. White in the exam room. Dr. White reported Mr. Winfrey stated he completed a neuropsychological evaluation in Charleston but could not recall the provider's name. When Dr. White mentioned several names, Mr. Winfrey identified Dr. Waid as the provider. Dr. White's office attempted to get a copy of the report as the study was ordered by his office but his staff was only able to leave voicemails. Dr. White reported Mr. Winfrey's MRIs revealed on normal degenerative changes of the brain and cervical spine and the nerve study indicated an incidental carpal tunnel syndrome. He explained he could not identify any neurological injury related to the electrical injury. Dr. White informed his staff was unable to obtain a copy of the report, Mr. Winfrey remarked that he did not want to wait any longer and left the office. I attempted to contact Kim, paralegal for Mr. Winfrey's attorney, regarding the report but Mr. McDaniel was unavailable. Dr. White stated he would continue to attempt to review a copy of the neuropsychological testing results and complete his note accordingly. No follow up appointment was recommended or scheduled.

NOV 20-Nov-2015, Dr. Adrian Van Bakel, Medical Director, MUSC Transplant Program.

Global Assessment:

1. Is the diagnosis confirmed to be consistent with the mechanism of injury? Yes, for cardiomyopathy. No, for paresthesias in his extremities. If no, explain: Dr. Marshall White,



Neurologist, has ruled out neurologic etiology for paresthesias per results of EMG/NCV, MRI of the brain, MRI of the cervical spine, and physical examination.

2. Does current treatment conform to evidence based guidelines? Yes. Guideline: Treatment for 425.4 (cardiomyopathy) includes diuretics and antihypertensive medications; and 782.4 (disturbance of skin sensation) includes EMG/NCV and MRI.

Tx. appears to be consistent with guidelines

Tx. does not appear to be consistent with guidelines. Explanation: N/A

3. Is the injured worker responding to the current treatment plan, and how/to what extent? No
If not, what next steps are recommended or needed? A neurology consultation is underway to address neuropathic complaints. Evaluation to determine the etiology of anemia is also needed.

4. What is the current work status/RTW plan? Not working. Mr. Winfrey is unlikely to return to the same work.

What are the current physical capabilities? Limited sedentary work, at best.

Is the injured worker on target to meet the modified duty or full duty RTW plan? No

If no, what are the barriers and plan to overcome the barriers? Mr. Winfrey is unlikely to return to the same work. The goal for Mr. Winfrey is MMI.

5. Medication concerns: None noted

Name	Dosage	Type	Frequency	Purpose	Prescribing Physician	Start Date	End Date
Altase	5 mg	OTC	One capsule daily	Anti-hypertensive	Lide, Lanneau D.		
HCTZ	12.5	Rx	One tablet daily	Anti-hypertensive	Lide, Lanneau D.		
Lasix	80 mg	Rx	One tablet daily	Diuretic/ Anti-hypertensive	Lide, Lanneau D.		
Spironolactone	25 mg	Rx	One tablet daily	Diuretic/ Anti-hypertensive	Lide, Lanneau D.		
Nitrostat	0.4 mg	Rx	One tablet under tongue for chest pain. May repeat	Antianginal	Lide, Lanneau D.		
Ranexa	500 mg ER	Rx	One tablet twice daily	Antianginal	Lide, Lanneau D.		
Pravastatin	40 mg	Rx	One tablet at bedtime	Dyslipidemic	Lide, Lanneau D.		
Vitamin C	500 mg	OTC	One tablet twice daily	Dietary supplement	Lide, Lanneau D.		

6. Medical Case Management Strategy:



- I will contact Mr. Winfrey on a weekly basis for report of medical status and to coordinate and schedule appointments through 8-Dec-2015.
- I will keep the CCO, defense, and plaintiff attorneys promptly advised of case developments as they occur through 8-Dec-2015.
- I will coordinate transportation for each of Mr. Winfrey's covered appointments.
- I will follow up for the report following completion of the transplant evaluation at MUSC.
- I will attend the follow up appointment with Dr. Lide, Cardiologist, on 22-Jan-2016 to review treatment plan.

Activity Date: 10-Oct-2015 - 08-Nov-2015

Activity Date	Activity Note
10/19/2015	Phone call to MRI through switchboard and extended hold at Lexington Medical Center to confirm MRI appointment for Mr. Winfrey on 10-20-15 with 3:00pm arrival time. An order was requested and I advised it was sent via fax on 9-14-15. After a brief search, the order was located and attached to the chart. Discussed with Amber that Mr. Winfrey is cleared to complete the MRIs and will not be declined again. She contacted Lynn and the MRI department to verify and confirmed everything is in order.
10/19/2015	Phone call to One Call Transportation to confirm Mr. Winfrey appointment and pick up times. Mr. Winfrey is to be picked up at 2:15pm for a 3:00pm arrival time for his MRIs at LMC on 10-20-15.
10/19/2015	Voicemail from Mr. Winfrey requesting return call regarding MRI appointment. Phone call to Mr. Winfrey to remind him of the appointment details for his MRI. I advised him the transportation vendor indicated they would pick him up at home on 10-20-15 at 2:15pm for a 3:00pm arrival time. I informed him I confirmed the appointment and verified everything was in order for the MRIs. I reminded him I would attend the MRI appointment with him to be sure all went smoothly for him this time. He voiced appreciation.
10/20/2015	Roundtrip travel to attend appointment with Mr. Winfrey to insure he is able to complete his MRI studies.
10/20/2015	Roundtrip mileage to attend appointment with Mr. Winfrey to insure he is able to complete his MRI studies.
10/20/2015	Mr. Winfrey arrived for his MRI studies at 2:40pm. The reception staff indicated he was taken back at check-in to begin his MRIs of the brain and cervical spine as they had a cancellation ahead of him. I advised I would wait to be sure his is able to complete his studies without administrative delays this time. Following the MRIs, I met with Mr. Winfrey. He reported the procedures took a long time and he was uncomfortable. He stated he had no problems otherwise with the MRIs. He explained he continues to have paresthesias in his legs and feet and general weakness. We discussed his upcoming appointment with Dr. Lide, Cardiologist, on Thursday. I reminded him transportation would be by to pick him up and should call tomorrow to confirm. He stated the technician advised the report would be ready in a few days. I asked if he received the CD



	<p>with MRI images. He remarked he did not. I advised I would acquire the CD and deliver it to Dr. White, Neurologist. He verbalized understanding. Following the MRIs, I met with Radiology/MRI staff to request and obtain a copy of the MRI images on CD for Dr. White, Neurologist, to review. I was directed from the MRI department to the main Radiology department. I completed a request form and provided my ID for verification. I was instructed to wait while the CD was created and provided.</p>
10/22/2015	Roundtrip travel to attend an appointment with Mr. Winfrey and Dr. Lide, Cardiologist.
10/22/2015	Roundtrip mileage to attend an appointment with Mr. Winfrey and Dr. Lide, Cardiologist.
10/22/2015	<p>Upon his arrival, I met with Mr. Winfrey in a secluded area of the waiting room. He reported fatigue and, by description, general malaise. He stated he tripped and fell at home two nights ago falling onto his right knee and hitting his left shoulder. He denied any lingering problems related to the fall. He walked with a shuffling gait and was moderately unsteady.</p> <p>Following a private examination, I met with Mr. Winfrey and Dr. Lide. Dr. Lide reported he would like Mr. Winfrey to be evaluated by the cardiac transplant team at the Medical University of South Carolina in Charleston for recommendations. He explained Mr. Winfrey's heart muscle is weak and his mitral valve leaks causing chronic fatigue and general weakness. He stated the evaluation does not necessarily mean the transplant is imminent but would better inform of the process and timetable. I obtained a copy of the lab work completed on 10-16-15 in Dr. Lide's office. We advised him Mr. Winfrey completed his MRIs and would follow up with Dr. White, Neurologist, on 11-5-15. Follow up with Dr. Lide is scheduled for 1-22-16 at 9:00pm.</p>
10/22/2015	Wait time for Dr. Lide
10/22/2015	Email update to Kim, paralegal, following the appointment attended with Mr. Winfrey and Dr. Lide, Cardiologist. Advised a copy of the visit documents would be sent separately via email upon return to my office. Copied to CCO and defense attorney.
10/22/2015	Email from Mr. Bayne, defense attorney, advising out of office with limited access to email and phone on 10-22-15 and 10-23-15.
10/22/2015	Provider Visit Report completed
11/2/2015	Email from Kim, paralegal, with letter from Mr. McDaniel, plaintiff attorney, regarding MUSC transplant evaluation.
11/2/2015	<p>Email to Mr. Bayne, defense attorney, and Beth, CCO, requesting status of approval for transplant evaluation for Mr. Winfrey. Explained rationale of Dr. Travis, Heart Surgeon, and Dr. Lide, Cardiologist to establish protocols and timeline.</p> <p>Email from Mr. Bayne advising limited access to emails but would address them as he can.</p>
11/4/2015	<p>Email from Kim, paralegal, requesting status of MRI reports.</p> <p>Email to Kim to inform I had not received the reports but did obtain a CD for Dr.</p>



	<p>White. Advised I would obtain copies of the reports and provide them with the update following the appointment with Dr. White, Neurologist, on 11-5-15.</p> <p>Email from Kim acknowledging the update.</p>
11/4/2015	Phone call with extended hold to confirm transportation for Mr. Winfrey to Dr. White's office on 11-5-15.
11/4/2015	Phone call from Beth, CCO, to discuss approval for Mr. Winfrey's transplant evaluation in Charleston. I advised I would contact the transplant team at MUSC and determine the process and duration for the evaluation. She advised she would confer with Mr. Bayne, defense counsel, after my update.
11/5/2015	<p>Phone call to MUSC Transplant Program to determine extent and duration of the evaluation for Mr. Winfrey on 11-20-15. After explanation of my request, I was transferred to a coordinator and left voicemail for return call with contact information.</p> <p>Phone call from Julie, pre-transplant coordinator. She advised Mr. Winfrey is to have a consultation with Dr. Adrian Van Bakel, Cardiac Transplant Department Chair, on 11-20-15 at 1:00pm with a 12:30pm arrival time. She stated this consultation would be to determine if a complete evaluation for transplant is warranted at this time and provide a possible timeline. She explained the consultation would be about 2 hours. She stated the full evaluation, if necessary, would be 4 days of comprehensive outpatient testing.</p>
11/5/2015	I met with Radiology Staff at Lexington Medical Center to obtain a copy of the MRI of the cervical spine and MRI of the brain reports for Mr. Winfrey. Pam and Cheryl accepted my request. After a short wait, copies of the reports were provided.
11/5/2015	Roundtrip travel to obtain MRI reports and to attend an appointment with Mr. Winfrey and Dr. White, Neurologist.
11/5/2015	Roundtrip mileage to obtain MRI reports and to attend an appointment with Mr. Winfrey and Dr. White, Neurologist.
11/5/2015	<p>I met with Mr. Winfrey in a secluded area of the waiting room. He reported fatigue and some increased anxiety related to his upcoming appointment in Charleston for his transplant consultation. We briefly discussed the process reported by Julie at MUSC. He inquired about his appointment with Dr. White, Neurologist, today. We discussed that Dr. White would be completing his evaluation and reviewing his MRIs. Apparently, Mr. Winfrey did not sign in and there was a considerable wait time.</p> <p>Following a private examination, I met with Mr. Winfrey and Dr. White in the exam room. Dr. White reported Mr. Winfrey stated he completed a neuropsychological evaluation in Charleston but could not recall the provider's name. When Dr. White mentioned several names, Mr. Winfrey identified Dr. Waid as the provider. Dr. White's office attempted to get a copy of the report as the study was ordered by his office but his staff was only able to leave voicemails. Dr. White reported Mr. Winfrey's MRIs revealed on normal degenerative changes of the brain and cervical spine and the nerve study indicated an incidental carpal tunnel syndrome. He explained he could not</p>



	identify any neurological injury related to the electrical injury. Dr. White informed his staff was unable to obtain a copy of the report, Mr. Winfrey remarked that he did not want to wait any longer and left the office. I attempted to contact Kim, paralegal for Mr. Winfrey's attorney, regarding the report but Mr. McDaniel was unavailable. Dr. White stated he would continue to attempt to review a copy of the neuropsychological testing results and complete his note accordingly. No follow up appointment was recommended or scheduled.
11/5/2015	Wait time for Dr. White
11/5/2015	Phone call to Kim, paralegal, to determine if Mr. Winfrey completed a neuropsychological evaluation with Dr. Waid and request a copy of the report be sent to Dr. White's office for his review. Kim advised Mr. McDaniel would need to address it and would call me back after lunch.
11/5/2015	Phone call from Mr. McDaniel, plaintiff attorney, for 30 minute conversation regarding Mr. Winfrey's neuropsychological evaluation by Dr. Randall Waid, Psychologist, and his upcoming transplant evaluation by Dr. Adrian Van Bakel, Medical Director MUSC transplant program. Mr. McDaniel graciously agreed to provide Dr. White, Neurologist, and me with a copy of Dr. Waid's evaluation results.
11/5/2015	Provider Visit Report completed
11/5/2015	Email update to Kim, paralegal, following the appointment attended with Mr. Winfrey and Dr. White. Attached copies of the MRI reports. Copied to defense attorney and CCO.
11/5/2015	Email from Mr. Bayne, defense attorney, to inquire about Mr. Winfrey's neuropsychological evaluation. Email to Mr. Bayne to advise Mr. Winfrey's attorney set up the appointment. Email from Mr. Bayne acknowledging update.
11/5/2015	Phone call to Beth, CCO, following the appointment attended with Mr. Winfrey and Dr. White. Informed of the apparent neuropsychological evaluation completed in Charleston with Dr. Waid as coordinated by Mr. McDaniel, plaintiff attorney. Advised of my conversation with the Julie, a transplant coordinator at MUSC. Discussed the 2 hour evaluation with Dr. Van Bakel, Medical Director for the Transplant Program, on 11-20-15 at 1:00pm and contrasted this evaluation with the 4-day evaluation if Mr. Winfrey is deemed a candidate for transplant. She advised she would confer with Mr. Bayne following my email update.
11/6/2015	Email from Mr. Bayne, defense attorney, inquiring about Mr. Winfrey's transportation to Charleston for the neuropsychological evaluation. Email to Mr. Bayne to inform him Mr. McDaniel, plaintiff attorney, arranged transportation through his office.
11/6/2015	Email from Beth, CCO, advising MUSC transplant evaluation is approved with transportation for Mr. Winfrey. She stated I would not need to attend but to be sure MD had records and follow up for the report. Email to Beth to acknowledge update and inform of transportation to neuropsychological evaluation.



	Email from Beth acknowledging the transportation update.
11/8/2015	Monthly Report completed

Howard Altman, RN

Submitted By: Howard Altman RN, BSN
Title: Case Manager - Medical
Phone #: (704) 503-4775, (803) 530-9693
Email: Howard.Altman@genexservices.com

Rosemary Dimmic

Supervised By: Rosemary Dimmic RN, CRRN
Supervisor - CM

HA/pt

Attachments: Include copies all correspondence, emails, and medical records received during this reporting period.

Cc: (Include all attachments)
McAngus, Goudelock, & Courie, LLC.
c/o Brett Bayne, Esq.
Meridian, 10th Floor
1320 Main Street
Columbia, SC 29201

(Include all attachments)
McDaniel Law Firm
c/o Preston McDaniel, Esq.
1315 Elmwood Avenue
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Nov. 9 - Dec. 8, 2015



MONTHLY REPORT

Claim #: 22209963 IW Name: Clarence Winfrey
Date of Assignment: 11-May-2015 Current Claims Case Owner: Elizabeth Wrinkle
DOI: 22-May-2013 Report Svc dates: 09-Nov-2015 to 08-Dec-2015

Referral Type: Medical - Field Vendor RN MCM: Howard Altman RN, BSN
Jurisdiction: South Carolina Employer: Archway Service
Attorney's Name: Preston McDaniel Contact Permission: Yes

**Referral objective: Mr. Winfrey's file was received on 11-May-2015 from Beth Wrinkle, CCO with Montgomery Insurance Company, for full case management to coordinate and schedule a neurology appointment to address balance and neuropathic complaints, attend appointments with Cardiologist to determine necessity of identifying a primary care provider at this time, and etiology of anemia and MMI.

Current work status: Not working

Target dates

RTW mod duty: Mr. Winfrey will not likely return to same work.

RTW full duty: Mr. Winfrey will not likely return to same work. Date of Report: December 08, 2015

MMI: To be determined Supplier unique field: CNGTLJ

WC Diagnosis (es):

Primary	Diagnosis Code	Diagnosis Description	Compensable
N	425.4	OTHER PRIMARY CARDIOMYOPATHIES	Y
Y	V45.81	POSTSURGICAL AORTOCOR BYPS STATUS	Y
N	782.0	DISTURBANCE OF SKIN SENSATION	N

Current treatment plan:

LOV 20-Nov-2015, Dr. Adrian Van Bakel, Medical Director, MUSC Transplant Program.

On 20-Nov-2015, Mr. Winfrey attended a consultation with Dr. Adrian Van Bakel at MUSC for an evaluation regarding heart transplantation. Dr. Van Bakel reported Mr. Winfrey had a 45% ejection fraction and moderate-to-severe mitral insufficiency. He indicated Mr. Winfrey would benefit from a CT surgery evaluation to determine the feasibility of a mitral valve repair procedure via femoral catheterization versus heart or left ventricular assistive device (LVAD) implantation. Dr. Van Bakel made a referral to Dr. Steinberg for this evaluation. He prescribed a beta-blocker to improve left ventricular function and advised Mr. Winfrey to increase his Lasix



to 60mg daily. He recommended follow up in 6-8 weeks after the evaluation with Dr. Steinberg.

A transesophageal echocardiogram is scheduled at MUSC on 28-Dec-2015 with an 11:00am arrival time at Central Registration. A consultation and transthoracic echocardiogram are scheduled on 5-Jan-2016 with Dr. Steinberg in the Department of Cardiology Clinic at MUSC at 2:00pm.

NOV 17-Dec-2015, Dr. Marshall White, Neurologist

Global Assessment:

1. Is the diagnosis confirmed to be consistent with the mechanism of injury? Yes, for cardiomyopathy. No, for paresthesias in his extremities. If no, explain: Dr. Marshall White, Neurologist, has ruled out neurologic etiology for paresthesias per results of EMG/NCV, MRI of the brain, MRI of the cervical spine, and physical examination.
2. Does current treatment conform to evidence based guidelines? Yes. Guideline: Treatment for 425.4 (cardiomyopathy) includes diuretics and antihypertensive medications; and 782.4 (disturbance of skin sensation) includes EMG/NCV and MRI. The addition of a beta-blocker to the cardiomyopathy regimen is within guidelines.

Tx. appears to be consistent with guidelines

Tx. does not appear to be consistent with guidelines. Explanation: N/A

3. Is the injured worker responding to the current treatment plan, and how/to what extent? No
If not, what next steps are recommended or needed? A neurology consultation is underway to address neuropathic complaints. Evaluation of his cardiomyopathy and mitral valve regurgitation is also underway.
4. What is the current work status/RTW plan? Not working. Mr. Winfrey is unlikely to return to the same work.

What are the current physical capabilities? Limited sedentary work, at best.

Is the injured worker on target to meet the modified duty or full duty RTW plan? No

If no, what are the barriers and plan to overcome the barriers? Mr. Winfrey is unlikely to return to the same work. The goal for Mr. Winfrey is MMI.

5. Medication concerns: None noted

Name	Dosage	Type	Frequency	Purpose	Prescribing Physician	Start Date	End Date
Altase	5 mg	OTC	One capsule daily	Anti-hypertensive	Lide, Lanneau D.		
HCTZ	12.5	Rx	One tablet daily	Anti-hypertensive	Lide, Lanneau D.		
Lasix	80 mg	Rx	One tablet daily	Diuretic/ Anti-hypertensive	Lide, Lanneau D.		
Spironolactone	25 mg	Rx	One tablet daily	Diuretic/ Anti-hypertensive	Lide, Lanneau D.		
Nitrostat	0.4 mg	Rx	One tablet under	Antianginal	Lide, Lanneau		



			tongue for chest pain. May repeat		D.		
Ranexa	500 mg ER	Rx	One tablet twice daily	Antianginal	Lide, Lanneau D.		
Pravastatin	40 mg	Rx	One tablet at bedtime	Dyslipidemic	Lide, Lanneau D.		
Vitamin C	500 mg	OTC	One tablet twice daily	Dietary supplement	Lide, Lanneau D.		
Metoprolol	25mg	Rx	One tablet daily	Beta-blocker	Van Bakel, Adrian	11/25/2015	

6. Medical Case Management Strategy:

- I will contact Mr. Winfrey on a weekly basis for report of medical status and to coordinate and schedule appointments through 7-Jan-2016.
- I will keep the CCO, defense, and plaintiff attorneys promptly advised of case developments as they occur through 7-Jan-2016.
- I will coordinate transportation for each of Mr. Winfrey's covered appointments.
- I will follow up for the report following completion of the evaluation by Dr. Steinberg at MUSC.
- I will attend the follow up appointment with Dr. Lide, Cardiologist, on 22-Jan-2016 to review treatment plan.

Activity Date: 09-Nov-2015 - 08-Dec-2015

Activity Date	Activity Note
11/10/2015	Email from Kim, paralegal, with letter from Mr. McDaniel, plaintiff attorney, with questions regarding Mr. White's evaluation of Mr. Winfrey.
11/12/2015	Email to Kim, paralegal, with response to 11-10-15 questions. Email from Kim, paralegal, with letter from Mr. McDaniel, plaintiff attorney, regarding follow up with Dr. White to review imaging. Attached copy of Dr. Waid's neuropsychological evaluation report.
11/12/2015	Email from Mr. Bayne requesting a copy of Mr. McDaniel's letter. Email to advise I attached it. Email from Mr. Bayne advising CCO forwarded a copy as he did not receive the attachment. Email to Mr. Bayne acknowledging update. Email from Mr. Bayne advising attorney cannot dictate what MD includes or excludes from report.
11/12/2015	Email from Kellen at Dr. White's office to advise of conversation with Mr. McDaniel, plaintiff attorney, and plan to see Mr. Winfrey for follow up on 12-3-15 at 1:00pm to review Mr. Winfrey's images.



	Email from Kellen to forward a copy of Dr. White's IME report without addendum.
11/12/2015	Phone call to Kellen at Dr. White's office to advise 12-3-15 appointment needs to be changed to allow me to attend with Mr. Winfrey. A new appointment was scheduled on 12-17-15 at 12:00pm with Dr. White in the Sumter office. We discussed the MRIs for Mr. Winfrey. I advised I left the CDs with the Sumter staff. He requested a second copy be obtained and brought to the appointment. I requested a copy of the IME report. He stated the addendum is not yet transcribed but he would forward the report without the addendum and forward the addendum later in the week.
11/13/2015	Phone call to One Call Transportation to schedule service for Mr. Winfrey to MUSC for evaluation with Dr. Van Bakel, Transplant Program Coordinator. Transportation scheduled for 11-20-15 appointment at 13:00pm in Charleston and back to Mr. Winfrey's home.
11/16/2015	Email from One Call Transportation acknowledging referral for 11-20-15 transportation to MUSC and back.
11/20/2015	Phone call from Mr. Winfrey at his appointment with Dr. Van Bakel. He requested I speak to the receptionist on his behalf to confirm worker's compensation information. I spoke directly with the reception staff and confirm the necessary information.
11/23/2015	Phone call to One Call Transportation to schedule service for 12-17-15 for Mr. Winfrey to and from appointment with Dr. White, Neurologist.
11/23/2015	Phone call from Mr. Winfrey regarding transportation vendors contact for 12-17-15 appointment. He advised he would not be attending the appointment as it would be a waste of his time. I advised his attorney requested the appointment and to discuss it with him. He informed me he completed the evaluation at MUSC on Friday and did not get home until 8:00pm. He declined comment about the evaluation.
11/23/2015	Email from Andrea at Mr. McDaniel's office to forward letter from plaintiff attorney.
11/24/2015	Email from Kim, paralegal, requesting MUSC MD information.
11/24/2015	Email from Beth, CCO, regarding new medication for Mr. Winfrey.
11/24/2015	Phone call to Beth, CCO, to discuss the medication was recommended by Dr. Van Bakel according to Mr. Winfrey.
12/7/2015	Email from Beth, CCO, with a copy of Dr. Van Bakel's OVN.
12/8/2015	Phone call from Mr. Winfrey to advise a MD office at MUSC called him this morning to schedule a test and a follow up appointment. Advised I would check into it. Phone call from Mr. Winfrey to provide name and contact number for Laura at MUSC. Advised I would contact her and determine what it is about. He stated Dr. Van Bakel referred him to another MD at MUSC.
12/8/2015	Phone call to Laura at Dr. Steinberg's office. Left voicemail for return call. Phone call from Laura. She explained Dr. Van Bakel referred Mr. Winfrey to Dr. Steinberg to evaluate and explore the possibility of a mitral valve repair. She stated Mr. Winfrey needs a transesophageal echocardiogram and then a consultation with Dr. Steinberg at MUSC. I requested copies of the orders. She



	stated she would provide them for carrier approval. She also advised a transthoracic echocardiogram would be conducted by Dr. Steinberg at the consultation. She explained she would schedule the TEE and let me know the time of arrival. She reported she sent Mr. Winfrey a packet of instructional information this morning via mail.
12/8/2015	Email to Beth, CCO, to update regarding Dr. Steinberg and the TEE and TTE. Requested approval. Email from Beth requesting clarification. Email to Beth advising of the purpose of the studies. Email from Beth approving the TEE and TTE with follow up.
12/8/2015	Email from Laura with orders for TEE and TTE. She advised Mr. Winfrey is to arrive at 11:00am at the Ashley River Tower at MUSC on 12-28-15 for his TEE.
12/8/2015	Email to Attorney's and CCO to advise of TEE appointment information and consultation with TTE by Dr. Steinberg, Cardiologist. TEE is 12-28-15 at MUSC with an 11:00am arrival time. The consultation and TTE with Dr. Steinberg is 1-5-16 at 2:00pm in the Cardiology Clinic at MUSC.
12/8/2015	Received and reviewed 20 pages of attorney letters, IME report, OVN, and prescriptions. Received and reviewed 17 pages including OVNs, MRI reports, attorney letter.
12/8/2015	Monthly Report completed

Howard Altman, RN

Submitted By: Howard Altman RN, BSN
Title: Case Manager - Medical
Phone #: (704) -503-4775, (803) 530-9693
Email: Howard.Altman@genexservices.com

Rosemary Dimmic

Supervised By: Rosemary Dimmic RN, CRRN
Supervisor - CM

HA/pt

Attachments: Include copies all correspondence, emails, and medical records received during this reporting period.

Cc: (Include all attachments)
McAngus, Goudelock, & Courie, LLC.
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(Include all attachments)
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Dec. 9²⁰¹⁵ — Jan. 7, 2016



MONTHLY REPORT

Claim #: 22209963 IW Name: Clarence Winfrey
Date of Assignment: 11-May-2015 Current Claims Case Owner: Elizabeth Wrinkle
DOI: 22-May-2013 Report Svc dates: 09-Dec-2015 to 07-Jan-2016
Referral Type: Medical - Field Vendor RN MCM: Howard Altman RN, BSN
Jurisdiction: South Carolina Employer: Archway Service
Attorney's Name: Preston McDaniel Contact Permission:
**Referral objective: Mr. Winfrey's file was received on 11-May-2015 from Beth Wrinkle, CCO with Montgomery Insurance Company, for full case management to coordinate and schedule a neurology appointment to address balance and neuropathic complaints, attend appointments with Cardiologist to determine necessity of identifying a primary care provider at this time, and etiology of anemia and MMI.
Current work status: Not working
Target dates
RTW mod duty: Mr. Winfrey will not likely return to same work.
RTW full duty: Mr. Winfrey will not likely return to same work. Date of Report: January 07, 2016
MMI: To be determined Supplier: unique field CNGTLJ

WC Diagnosis (es):

Primary	Diagnosis Code	Diagnosis Description	Compensable
N	425.4	OTHER PRIMARY CARDIOMYOPATHIES	Y
Y	V45.81	POSTSURGICAL AORTOCOR BYPS STATUS	Y
N	782.0	DISTURBANCE OF SKIN SENSATION	N
	394.9	OTHER DISEASES OF MITRAL VALVE	

On 17-Dec-2015, I attended an appointment with Mr. Winfrey and Dr. Marshall White, Neurologist. I met with Mr. Winfrey in the waiting area. He reported no change in his physical status. He was observed to have an ataxic gait and shortness of breath with any exertion. We discussed his upcoming appointment with Dr. Steinberg and the TEE to be completed. I explained the procedure and its purpose. I answered his questions and he verbalized understanding. I informed him Dr. White would need to use my laptop computer to view the imaging CDs and I would need to instruct Dr. White in navigating the files on my computer. Mr. Winfrey stated he wanted me to be in the room with him during the examination as he was uncertain of Dr. White. I requested he advise Mr. McDaniel of this request as well. He stated he would tell him.



We met with Dr. White in the exam room. Dr. White reviewed a 7-23-14 CT of the head completed at Providence Hospital, and 10-20-15 MRIs of the brain and cervical spine. He stated the imaging reveals significant atrophy of the brain tissues. He explained this finding coupled with memory issues and ataxic gait indicate a degenerative neurologic process that would be unrelated to his electrical shock. He advised Mr. Winfrey to consult his primary care physician for a referral to MUSC for a thorough evaluation and diagnosis of the degenerative disease. Dr. White stated the carpal tunnel syndrome is likely related to the electrical injury and edema associated with the injury as the current entered the left middle finger and traveled proximally toward his heart. He recommended watchful waiting at this time as Mr. Winfrey does not complain of carpal tunnel symptoms in the left wrist at this time. Both imaging CDs were given to Mr. Winfrey to retain for his records. No follow up appointment was recommended or scheduled.

Current treatment plan:

LOV 05-Jan-2016, Drs. Steinberg and Ikonomidis, Cardiothoracic Surgeons (MUSC)

On 5-Jan-2016, Mr. Winfrey attended an evaluation by Dr. Daniel Steinberg, Valve Specialist, and Dr. John Ikonomidis, Chief of Cardiothoracic Surgery at MUSC. I received a phone call from Laura at Dr. Steinberg office at MUSC. She stated Dr. Steinberg evaluated Mr. Winfrey's TTE and TEE and ordered pulmonary function tests and other tests for preoperative evaluation which were completed. She explained Mr. Winfrey was also evaluated by Dr. John Ikonomidis, MD/PhD, Chief of Cardiothoracic Surgery at MUSC. Laura reported Dr. Ikonomidis recommended a mitral valve repair with possible replacement and placed Mr. Winfrey in a low-intermediate risk category for the procedure. She advised Dr. Ikonomidis would like to proceed with surgery the next week. Dr. Ikonomidis ordered Mr. Winfrey to undergo a dental exam to rule out periodontal disease before he could undergo a heart procedure. Laura advised Dr. Ikonomidis suggested the procedure would improve Mr. Winfrey's heart function and significantly delay the need for transplant consideration. I requested Dr. Steinberg and Dr. Ikonomidis confer with Dr. Jeffrey Travis for Mr. Winfrey's peace of mind. Laura stated she would pass the request on to them and request their notes be completed as soon as possible. I advised the surgery would need to go through the approval process before authorization would be given for the procedure.

NOV 20-Jan-2016, Dr. Lanneau Lide, Cardiologist

Global Assessment:

1. Is the diagnosis confirmed to be consistent with the mechanism of injury? Yes, for cardiomyopathy. No, for paresthesias in his extremities. If no, explain: Dr. Marshall White, Neurologist, has ruled out neurologic etiology for paresthesias per results of EMG/NCV, MRI of the brain, MRI of the cervical spine, and physical examination. MUSC Valve Team recommended valve repair replacement surgery. Causation is in question.



2. Does current treatment conform to evidence based guidelines? Yes. Guideline: Treatment for 425.4 (cardiomyopathy) includes diuretics and antihypertensive medications; and 782.4 (disturbance of skin sensation) includes EMG/NCV and MRI. The addition of a beta-blocker to the cardiomyopathy regimen is within guidelines. Diagnosis 394.9 (other diseases of mitral valve) has not been accepted.

Tx. appears to be consistent with guidelines

Tx. does not appear to be consistent with guidelines. Explanation: N/A

3. Is the injured worker responding to the current treatment plan, and how/to what extent? No
If not, what next steps are recommended or needed? Evaluation of his cardiomyopathy and mitral valve regurgitation is also underway.

4. What is the current work status/RTW plan? Not working. Mr. Winfrey is unlikely to return to the same work.

What are the current physical capabilities? Limited sedentary work, at best.

Is the injured worker on target to meet the modified duty or full duty RTW plan? No

If no, what are the barriers and plan to overcome the barriers? Mr. Winfrey is unlikely to return to the same work. The goal for Mr. Winfrey is MMI.

5. Medication concerns: None noted

Name	Dosage	Type	Frequency	Purpose	Prescribing Physician	Start Date	End Date
Altase	5 mg	OTC	One capsule daily	Anti-hypertensive	Lide, Lanneau D.		
HCTZ	12.5	Rx	One tablet daily	Anti-hypertensive	Lide, Lanneau D.		
Lasix	80 mg	Rx	One tablet daily	Diuretic/ Anti-hypertensive	Lide, Lanneau D.		
Spironolactone	25 mg	Rx	One tablet daily	Diuretic/ Anti-hypertensive	Lide, Lanneau D.		
Nitrostat	0.4 mg	Rx	One tablet under tongue for chest pain. May repeat	Antianginal	Lide, Lanneau D.		
Ranexa	500 mg ER	Rx	One tablet twice daily	Antianginal	Lide, Lanneau D.		
Pravastatin	40 mg	Rx	One tablet at bedtime	Dyslipidemic	Lide, Lanneau D.		
Vitamin C	500 mg	OTC	One tablet twice daily	Dietary supplement	Lide, Lanneau D.		

6. Medical Case Management Strategy:

- I will contact Mr. Winfrey on a weekly basis for report of medical status and to coordinate and schedule appointments through 5-Feb-2016.



- I will keep the CCO, defense, and plaintiff attorneys promptly advised of case developments as they occur through 5-Feb-2016.
- I will follow up with Dr. White's office for his report by 11-Jan-2016.
- I will coordinate transportation for each of Mr. Winfrey's covered appointments.
- I will follow up for the reports from Dr. Van Bakel and Dr. Ikonomidis at MUSC.
- I will attend the follow up appointment with Dr. Lide, Cardiologist, on 20-Jan-2016 to review treatment plan.

Activity Date: 09-Dec-2015 - 07-Jan-2016

Activity Date	Activity Note
12/10/2015	Email from Kim, paralegal, to forward a letter from Mr. McDaniel, plaintiff attorney, regarding MUSC evaluations.
12/11/2015	Email from Beth, CCO, regarding update, transportation, and the MUSC evaluations. Email to Beth, CCO, and Mr. Bayne, defense attorney, with update regarding MUSC evaluation and records. Advised I would obtain the LMC and Dr. Travis' records for Dr. Steinberg's review. Email from Beth, CCO, to advise of Regional Medical Director review with CCO and Defense Attorney.
12/11/2015	Email from Mr. Bayne, defense attorney, to inform he believed Dr. Travis provided Mr. Winfrey with documentation advising against driving. Email from Mr. Bayne agreeing the evaluations by the valve specialist should go forward and care would be directed by the carrier.
12/14/2015	Roundtrip travel to obtain medical records for Mr. Winfrey from Lexington Medical Center and Lexington Cardiovascular Surgery.
12/14/2015	Roundtrip travel to obtain medical records for Mr. Winfrey from Lexington Medical Center and Lexington Cardiovascular Surgery.
12/14/2015	I met with medical records staff at Lexington Medical Center to request medical records for Mr. Winfrey from 22-May-2013 to present to forward to Dr. Steinberg for his review. Completed written request. Staff advised the records should be ready for pick-up by Friday. She informed me staff would contact me when ready.
12/14/2015	I met with reception staff at Lexington Cardiovascular Surgery, Dr. Travis' office, to request medical records for Mr. Winfrey from 22-May-2013 to present to forward to Dr. Steinberg for his review. Provided written request. Staff advised I could wait for the records to print, if desired. Office records and test results provided for date range requested.
12/15/2015	Phone call from Medical Records at Lexington Medical Center to inform the requested records would be over 1400 pages. Staff advised an abstract which produces only the important documents such as progress notes, consultations, operative/procedure notes, radiology notes, and discharge summaries. I advised that would be adequate for the Cardiologist's review. She stated it would be



	ready for pick up after 1:00pm.
12/16/2015	Roundtrip travel to pick-up 87 pages of medical records from Lexington Medical Center.
12/16/2015	Roundtrip mileage to pick up 87 pages of medical records from Lexington Medical Center.
12/16/2015	I met with Medical Records staff at Lexington Medical Center to pick up the requested medical records for Mr. Winfrey to be sent to Dr. Steinberg, Cardiologist, for review. Obtained 87 pages of hospital records
12/16/2015	Phone call to One Call Transportation to confirm services for Mr. Winfrey to Dr. White's office and back for his follow up appointment. Completed 2 referrals for 12-28-15 and 1-5-16 appointments in Charleston for TEE and consultation with Dr. Steinberg.
12/16/2015	Phone call to confirm appointment on 12-17-15 for Mr. Winfrey and Dr. White at 12:00pm in the Sumter office. After a long hold, Kellen confirmed the appointment.
12/16/2015	Phone call to Mr. Winfrey to confirm his plan to attend the appointment with Dr. White, Neurologist on 12-17-15 at 12:00pm. He advised he would attend and I confirmed transportation would be picking him up at 9:45am.
12/17/2015	Email from One Call Transportation with service confirmations for 12-28-15 and 1-5-16 appointments in Charleston.
12/17/2015	Roundtrip travel to attend an appointment with Mr. Winfrey and Dr. White, Neurologist.
12/17/2015	Roundtrip mileage to attend an appointment with Mr. Winfrey and Dr. White, Neurologist.
12/17/2015	<p>I met with Mr. Winfrey in the waiting area. He reported no change in his physical status. He was observed to have an ataxic gait and shortness of breath with any exertion. We discussed his upcoming appointment with Dr. Steinberg and the TEE to be completed. I explained the procedure and its purpose. I answered his questions and he verbalized understanding. I informed him Dr. White would need to use my laptop computer to view the imaging CDs and I would need to instruct Dr. White in navigating the files on my computer. Mr. Winfrey stated he wanted me to be in the room with him during the examination as he was uncertain of Dr. White. I requested he advise Mr. McDaniel of this request as well. He stated he would tell him.</p> <p>We met with Dr. White in the exam room. Dr. White reviewed a 7-23-14 CT of the head completed at Providence Hospital, and 10-20-15 MRIs of the brain and cervical spine. He stated the imaging reveals significant atrophy of the brain tissues. He explained this finding coupled with memory issues and ataxic gait indicate a degenerative neurologic process that would be unrelated to his electrical shock. He advised Mr. Winfrey to consult his primary care physician for a referral to MUSC for a thorough evaluation and diagnosis of the degenerative disease. Dr. White stated the carpal tunnel syndrome is likely related to the electrical injury and edema associated with the injury as the current entered the left middle finger and traveled proximally toward his heart. He recommended watchful waiting at this time as Mr. Winfrey does not complain of carpal tunnel symptoms in the left wrist at this time. Both imaging CDs were given to Mr.</p>



	Winfrey to retain for his records. No follow up appointment was recommended or scheduled.
12/17/2015	Email update to Kim, paralegal, following the appointment attended with Mr. Winfrey and Dr. White.
12/17/2015	Provider Visit Report completed
12/17/2015	Wait
12/18/2015	Email from Mr. Bayne, defense attorney, to request a copy of Dr. White's formal report when available.
12/18/2015	Email from Beth, CCO, advising questions for Dr. Van Bakel may be coming from defense counsel and regional medical director.
12/21/2015	Email conversation with Beth, CCO, regarding questions for transplant team and waiting for me to attend an appointment with providers in Charleston.
1/4/2016	Phone call to Mr. Winfrey to confirm transportation contacted him regarding his appointment with Dr. Steinberg in Charleston. He reported pick up is at 11:30am. We discussed his appointment. I asked if he would be willing to carry his records to Dr. Steinberg if I brought them to him. He stated he would be glad to take them. We arranged a meeting place and time.
1/4/2016	Roundtrip travel to deliver medical records to Mr. Winfrey for Dr. Steinberg.
1/4/2016	Roundtrip mileage to deliver medical records to Mr. Winfrey for Dr. Steinberg.
1/4/2016	I met with Mr. Winfrey to deliver medical records from Dr. Travis and Lexington Medical Center for Dr. Steinberg to review. I advised him to deliver them directly to Dr. Steinberg's nurse that escorts him to the exam room and not the receptionist or other staff member. Mr. Winfrey verbalized understanding. We discussed the TTE and the visit with Dr. Steinberg. He appeared less anxious following our conversation.
1/4/2016	Fax to Dr. Steinberg's office to forward records from Dr. Travis, Cardiac Surgeon. LMC records file too large to send.
1/5/2016	Phone call from Laura at MUSC to advise Drs. Steinberg and Ikonomidis recommended surgery to repair/replace Mr. Winfrey's mitral valve next week. She stated all the necessary preoperative work up was completed today and a dental exam for clearance regarding periodontal disease. I advised the carrier will need records from all providers to make a determination regarding the surgery approval. She stated she would request the providers complete them today or tomorrow and she will forward them when ready.
1/5/2016	Phone call from Mr. Winfrey to inform of proposed surgery. He stated he was very anxious. I explained we would proceed cautiously and not rush into anything. He expressed appreciation. We discussed what was recommended and that we would again request Drs. Steinberg and Ikonomidis confer with Dr. Travis. He stated he would like that very much.
1/5/2016	Email update to Kim, paralegal, following Mr. Winfrey's appointment at MUSC. Copied to defense attorney and CCO.
1/6/2016	Email from Beth, CCO, regarding dental exam and need for MD notes for review.
1/6/2016	Email from Laura at MUSC to forward Dr. Steinberg's 1-5-16 OVN.
1/6/2016	Email to Kim, paralegal, to forward a copy of the 1-5-16 OVN from Dr. Steinberg.
1/7/2016	Email from Kim, paralegal, to acknowledge receipt of OVN and request notes from Drs. Van Bakel and Ikonomidis.
1/7/2016	Phone call to Beth, CCO, to discuss file. She advised dental exam would not be a



	covered exam under the claim. She explained all notes from all providers need to be received and reviewed by the Regional Medical Director before consideration of the surgery.
1/7/2016	Received and reviewed 101 pages of Lexington Medical Center records and Dr. Travis and Dr. Steinberg notes./ Billed for e-mail correspondence received and reviewed.
1/7/2016	Monthly Report completed

Wm. Howard Altman, RN

Submitted By: Howard Altman RN, BSN
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Email: Howard.Altman@genexservices.com

Rosemary Dimmic

Supervised By: Rosemary Dimmic RN, CRRN
Supervisor - CM

HA/pt

Attachments: Include copies all correspondence, emails, and medical records received during this reporting period.

Cc: (Include all attachments)
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Angelia

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Jan 8 - Feb. 6, 2016



MONTHLY REPORT

Claim #: 22209963 IW Name: Clarence Winfrey
Date of Assignment: 11-May-2015 Current Claims Case Owner: Elizabeth Wrinkle
DOI: 22-May-2013 Report Svc dates: 08-Jan-2016 to 06-Feb-2016
Referral Type: Medical - Field Vendor RN MCM: Howard Altman RN, BSN
Jurisdiction: South Carolina Employer: Archway Service
Attorney's Name: Preston McDaniel Contact Permission: Yes
**Referral objective: Mr. Winfrey's file was received on 11-May-2015 from Beth Wrinkle, CCO with Montgomery Insurance Company, for full case management to coordinate and schedule a neurology appointment to address balance and neuropathic complaints, attend appointments with Cardiologist to determine necessity of identifying a primary care provider at this time, and etiology of anemia and MMI.
Current work status: Not working
Target dates
RTW mod duty: Mr. Winfrey will not likely return to same work.
RTW full duty: Mr. Winfrey will not likely return to same work. Date of Report: February 06, 2016
MMI: To be determined Supplier unique field: CNGTLJ

WC Diagnosis (es):

Primary	Diagnosis Code	Diagnosis Description	Compensable
N	425.4	OTHER PRIMARY CARDIOMYOPATHIES	Y
Y	V45.81	POSTSURGICAL AORTOCOR BYPS STATUS	Y
N	782.0	DISTURBANCE OF SKIN SENSATION	N

Current treatment plan:

LOV 20-Jan-2016, Dr. Lanneau Lide, Cardiologist

On 20-Jan-2016, I attended a follow up appointment with Mr. Winfrey and Dr. Lanneau Lide, Cardiologist. I met with Mr. Winfrey in a secluded area of the waiting room. He reported continued fatigue with minimal exertion. We discussed his appointments with Dr. Steinberg, Valve Specialist, and Dr. Ikonomidis, Chief of Cardiothoracic Surgery at MUSC. I advised we are still waiting for Dr. Van Bakel, Director of Transplant Services at MUSC, to send his 11-20-15 note. We discussed that Dr. Van Bakel may not need to see him on 1-26-16 and I am waiting for determination from his office.



Following a private examination, I met with Mr. Winfrey and Dr. Lide in the exam room. I provided Dr. Lide with copies of notes from Dr. Steinberg and Dr. Ikonomidis for his records and review. He advised Mr. Winfrey to follow up at MUSC until released to follow up with SC Heart again. I advised the recommended surgery has not been approved yet. Dr. Lide advised, if the surgery and recovery are delayed more than 2 months to follow up in his office. No follow up appointment is scheduled at this time pending valve surgery disposition.

Dr. Van Bakel's 11-20-15 office visit note was received and distributed to the attorneys and CCO. Approval for the valve repair versus replacement is pending.

NOV Pending CCO direction regarding surgery,

Global Assessment:

1. Is the diagnosis confirmed to be consistent with the mechanism of injury? Yes, for cardiomyopathy. No, for paresthesias in his extremities. If no, explain: Dr. Marshall White, Neurologist, has ruled out neurologic etiology for paresthesias per results of EMG/NCV, MRI of the brain, MRI of the cervical spine, and physical examination. MUSC Valve Team recommended valve repair replacement surgery. Causation is in question.

2. Does current treatment conform to evidence based guidelines? Yes. Guideline: Treatment for 425.4 (cardiomyopathy) includes diuretics and antihypertensive medications; and 782.4 (disturbance of skin sensation) includes EMG/NCV and MRI. The addition of a beta-blocker to the cardiomyopathy regimen is within guidelines. Diagnosis 394.9 (other diseases of mitral valve) has not been accepted.

Tx. appears to be consistent with guidelines

Tx. does not appear to be consistent with guidelines. Explanation: N/A

3. Is the injured worker responding to the current treatment plan, and how/to what extent? No
If not, what next steps are recommended or needed? Evaluation of his cardiomyopathy and mitral valve regurgitation is also underway.

4. What is the current work status/RTW plan? Not working. Mr. Winfrey is unlikely to return to the same work.

What are the current physical capabilities? Limited sedentary work, at best.

Is the injured worker on target to meet the modified duty or full duty RTW plan? No

If no, what are the barriers and plan to overcome the barriers? Mr. Winfrey is unlikely to return to the same work. The goal for Mr. Winfrey is MMI.

5. Medication concerns: None noted

Name	Dosage	Type	Frequency	Purpose	Prescribing Physician	Start Date	End Date
Altase	.5 mg	OTC	One capsule daily	Anti-hypertensive	Lide, Lanneau D.		
HCTZ	12.5	Rx	One tablet daily	Anti-hypertensive	Lide, Lanneau D.		



Lasix	80 mg	Rx	One tablet daily	Diuretic/ Anti-hypertensive	Lide, Lanneau D.		
Spironolactone	25 mg	Rx	One tablet daily	Diuretic/ Anti-hypertensive	Lide, Lanneau D.		
Nitrostat	0.4 mg	Rx	One tablet under tongue for chest pain. May repeat	Antianginal	Lide, Lanneau D.		
Ranexa	500 mg ER	Rx	One tablet twice daily	Antianginal	Lide, Lanneau D.		
Pravastatin	40 mg	Rx	One tablet at bedtime	Dyslipidemic	Lide, Lanneau D.		
Vitamin C	500 mg	OTC	One tablet twice daily	Dietary supplement	Lide, Lanneau D.		
Metoprolol	25mg	Rx	One tablet daily	Anti-hypertensive	Van Bakel, Adrian, B	12/1/2015	

6. Medical Case Management Strategy:

- I will contact Mr. Winfrey on a weekly basis for report of medical status and to coordinate and schedule appointments through 7-Mar-2016.
- I will keep the CCO, defense, and plaintiff attorneys promptly advised of case developments as they occur through 7-Mar-2016.
- I will coordinate transportation for each of Mr. Winfrey's covered appointments.
- I will coordinate with the MUSC valve team, when approved by CCO.

Activity Date: 08-Jan-2016 - 06-Feb-2016

Activity Date	Activity Note
1/8/2016	Phone call to Laura at MUSC regarding status of Dr. Van Bakel and Dr. Ikonomidis notes. Left voicemail for return call and provide contact information.
1/11/2016	Phone call to Laura at MUSC regarding status of Dr. Van Bakel and Dr. Ikonomidis notes. Left voicemail for return call and provide contact information.
1/11/2016	Email to Kellen at Dr. White's office to request the 12-17-15 note for Mr. Winfrey.
1/11/2016	Voicemail from Kellen to advise he would forward the note as soon as Dr. White completed it.
1/18/2016	Email from Laura at MUSC to forward 1-5-16 OVN by Dr. Ikonomidis, Chief of Cardiothoracic Surgery at MUSC.
1/19/2016	Phone call to One Call Transportation to confirm service for 1-20-16 to transport Mr. Winfrey to and from his 9:00am appointment with Dr. Lide, Cardiologist. Staff confirmed contact information and addresses for destinations.
1/19/2016	Email from One Call Transportation with notification of confirmation for service 1-20-16.
1/20/2016	Email to Laura at MUSC requesting status of Dr. Van Bakel's OVN from 11-20-15. Also, requested determination of necessity of 1-26-16 follow up with Dr. Van Bakel in light of the referral recommendations.
1/20/2016	Email to Kim, paralegal, to forward a copy of the 1-5-16 OVN by Dr. Ikonomidis. Copied to defense attorney and CCO.



	<p>Email form Kim acknowledging receipt.</p> <p>Email update to Kim, paralegal, following the appointment attended with Mr. Winfrey and Dr. Lide. Copied to defense attorney and CCO.</p>
1/20/2016	<p>Email from Beth, CCO, for clarification of date for previous procedure in OVN by Dr. Ikonomidis.</p> <p>Email to Beth advising probable typo regarding procedure date.</p>
1/20/2016	Roundtrip travel to attend an appointment with Mr. Winfrey and Dr. Lide, Cardiologist.
1/20/2016	Roundtrip mileage to attend an appointment with Mr. Winfrey and Dr. Lide, Cardiologist.
1/20/2016	<p>I met with Mr. Winfrey in a secluded area of the waiting room. He reported continued fatigue with minimal exertion. We discussed his appointments with Dr. Steinberg, Valve Specialist, and Dr. Ikonomidis, Chief of Cardiothoracic Surgery at MUSC. I advised we are still waiting for Dr. Van Bakel, Director of Transplant Services at MUSC, to send his 11-20-15 note. We discussed that Dr. Van Bakel may not need to see him on 1-26-16 and I am waiting for determination from his office.</p> <p>Following a private examination, I met with Mr. Winfrey and Dr. Lide in the exam room. I provided Dr. Lide with copies of Dr. Steinberg and Dr. Ikonomidis notes for his records and review. He advised Mr. Winfrey to follow up at MUSC until released to follow up with SC Heart again. I advised the recommended surgery has not been approved yet. Dr. Lide advised, if the surgery and recovery are delayed more than 2 months to follow up in his office. No follow up appointment is scheduled at this time pending valve surgery disposition.</p>
1/20/2016	Wait time for Dr. Lide, Cardiologist
1/20/2016	Provider Visit Report completed
1/21/2016	Voicemail from Mr. Winfrey informing he received a phone call from Providence regarding non-payment of the colonoscopy procedure on 6-9-15. He requested carrier be notified.
1/21/2016	Phone call from Betsy at Dr. Ikonomidis' office regarding need for follow up appointment with Dr. Van Bakel on 1-26-16. She explained Dr. Ikonomidis is the surgeon and until the surgery is approved Mr. Winfrey should follow up with a cardiologist. I advised he had an appointment with his local cardiologist, Dr. Lide, on 1-20-16. She stated she would confirm with Dr. Van Bakel that Mr. Winfrey does not need to attend 1-26-16 appointment and let me know soon.
1/21/2016	Email to Beth, CCO, regarding phone call from Mr. Winfrey about 6-9-15 colonoscopy bills and collection calls. Also updated regarding necessity for 1-26-16 appointment with Dr. Van Bakel at MUSC.
1/25/2016	Phone call to Betsy at Dr. Ikonomidis' office to determine status of Dr. Van Bakel's note and necessity of Mr. Winfrey's appointment on 1-26-16. She advised she would contact Dr. Van Bakel's staff again regarding the 11-20-15 OVN and verify if Mr. Winfrey should attend the 1-26-16 appointment. She stated she would call me back.



	Phone call from Betsy. She indicated Mr. Winfrey does not need to attend the 1-26-16 appointment scheduled with Dr. Van Bakel. She also stated she reminded the staff member the surgical approval is delayed because Dr. Van Bakel's note had not been received.
1/25/2016	Phone call from Sean Barry at Dr. Van Bakel's office to verify contact information and to advise he would be sending the 11-20-16 OVN via fax shortly. I was placed on hold twice during the call.
1/25/2016	Email from Sean Barry at Dr. Van Bakel's office to forward a copy of the 11-20-16 OVN requested.
1/25/2016	Email from Betsy at Dr. Ikonomidis' office to forward a copy of Dr. Van Bakel's note from 11-20-15.
1/25/2016	Email to Kim, paralegal to forward a copy of the 11-20-15 OVN from Dr. Van Bakel, MUSC.
1/25/2016	Email from Rose, legal assistant, to forward a letter from Mr. McDaniel, plaintiff attorney, to Dr. White, Neurologist. The letter addressed the scope of the neurologic assessment and the report.
1/25/2016	Phone call to Mr. Winfrey for report of medical status and inform him he does not need to attend the 1-26-16 appointment with Dr. Van Bakel at MUSC. He reported no changes in his medical status. He expressed appreciation for not having to travel to Charleston again for the appointment.
1/26/2016	Email from Kim, paralegal, requesting copy of Dr. White's 12-17-15 OVN. Email to Kim to inform OVN not received yet.
1/27/2016	Email from Beth, CCO, requesting review of mileage reimbursement from Mr. Winfrey's attorney's office and clarification of services for these visits. Email to Beth advising the visits are to Vocational Rehabilitation for cardiac rehab services. Advised it is a state sponsored service and she would probably not receive a bill for the services. Email from Beth acknowledging the update.
1/27/2016	Email from Kim, paralegal, to acknowledge OVN update.
1/27/2016	Email from Rose, legal assistant, to forward a letter from Mr. McDaniel, plaintiff attorney, requesting anticipated surgery date and copies of scans for Mr. Winfrey.
1/29/2016	Email from Beth, CCO, inquiring about best time for conference call. Email to Beth advising Monday morning would be available. Email from Beth informing Monday morning is good. Email to Beth acknowledging plan for call.
2/1/2016	Email from Beth, CCO, inquiring if 10:00am is good for conference call. Email to Beth confirming time. Email from Beth informing she would be calling soon.



	Email from Beth regarding Dr. White's 12-17-15 note. Email to Beth to inform note not received yet. Email from Beth acknowledging update regarding the note.
2/1/2016	Email from Mr. Bayne, defense attorney, regarding call timing. Email from Mr. Bayne with video of Dr. Ikonomidis at MUSC regarding valve replacement and possible avoidance of transplant. Email to Mr. Bayne to advise cardiac rehabilitation would be necessary for optimum outcome following the surgery. Email from Mr. Bayne to expound regarding questions longevity and success without lifestyle modifications such as smoking cessation.
2/1/2016	Phone call with Mr. Bayne, defense attorney, and Beth, CCO, to discuss findings from MUSC and surgical recommendations. Informed by Mr. Bayne approval is pending completion of depositions of providers at MUSC. Advised Mr. Winfrey reports he only smokes about 4 cigarettes daily and MUSC is aware per Dr. Ikonomidis' note. Advised by CCO there are questions regarding transplant versus valve repair versus valve replacement. We discussed the recommendation of Dr. Ikonomidis. Advised I would wait for direction regarding pursuit and scheduling of surgery.
2/1/2016	Email to Kellen at Dr. White's office to request status of 12-17-15 OVN.
2/1/2016	Email from Dr. Lide's office to forward 6-17-15 lab report.
2/2/2016	Email from Kellen at Dr. White's office advising Dr. White out of the office until 2-4-16 and he would remind him again then.
2/6/2016	Received and reviewed 16 pages including attorney letters, OVN, and lab report./Billed for e-mail correspondence received.
2/6/2016	Monthly Report completed

Howard Altman, RN

Submitted By: Howard Altman RN, BSN
Title: Case Manager - Medical
Phone #: (704) 503-4775, (803) 530-9693
Email: Howard.Altman@genexservices.com

Rosemary Dimmic

Supervised By: Rosemary Dimmic RN, CRRN
Supervisor - CM

HA/pt

Attachments: Include copies all correspondence, emails, and medical records received during this reporting period.



Cc:

(Include all attachments)
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SC Court of Appeals

Jenny Abbott Kitchings
Clerk of Court
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