



Lombardi Associates Cost and Care Management Solutions

TODAY'S AGENDA

- ▶ Who We Are
- ▶ Case Management Services
- ▶ Crisis Management Services
- ▶ Vocational Rehabilitation
- ▶ Litigation Management Services
- ▶ Cost Management Solutions



Who We Are

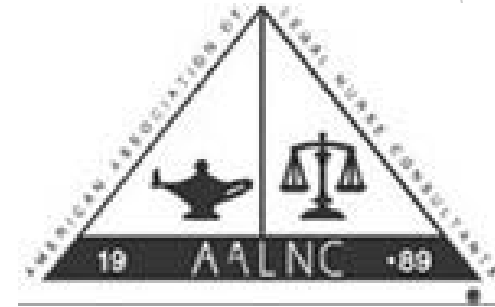
LOMBARDI ASSOCIATES, a National Provider and Woman Owned Business, was founded by Tracey Lombardi, RN-BC,BA,CCM,CNLC, CNLCP,MSCC in 2005.

LOMBARDI ASSOCIATES SERVICES INCLUDE:

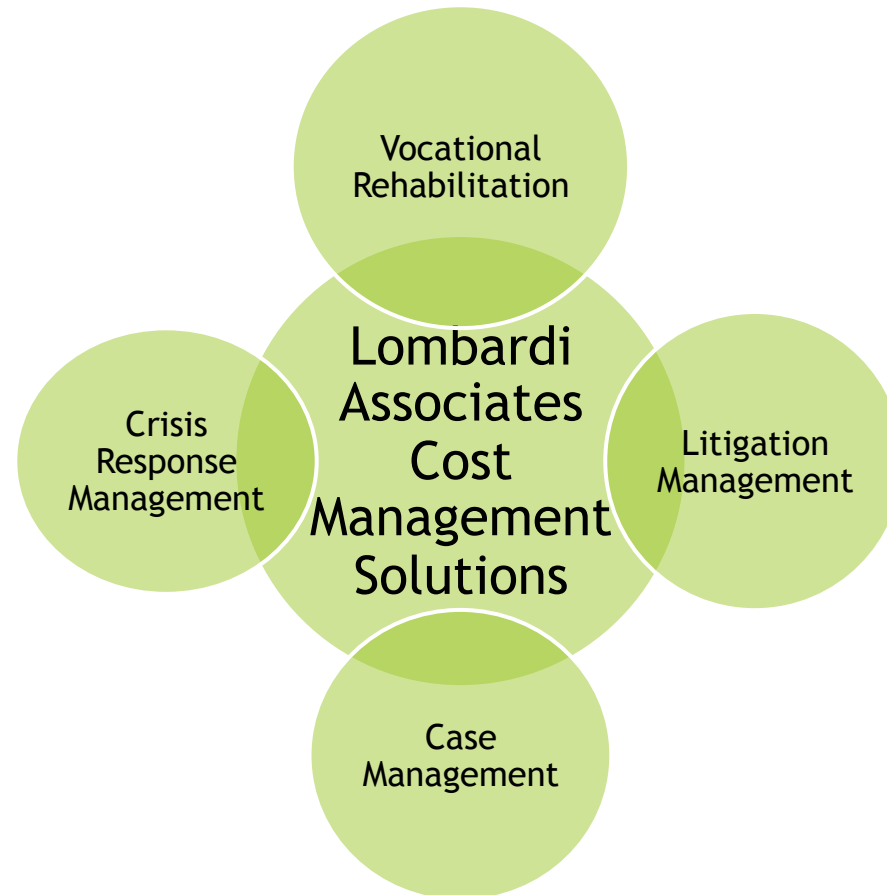
- ✓ Case Management
- ✓ Legal Nursing Consulting
- ✓ File Review
- ✓ Medical Cost Projections
- ✓ Life Care Planning/Review
- ✓ Medicare Set-Asides
- ✓ Vocational Case Management
- ✓ Disability Management
- ✓ Crises Response
- ✓ Active Shooter Training

WHO WE ARE

CLINICAL EXPERTISE-CERTIFICATIONS



Lombardi Associates: One Provider for Your National Claims Management Solutions



Case Management Services

Why Case Management?¹

- ▶ Claims with nurse involvement have 18% lower future medical costs, 26% lower overall claim costs and 15% faster claims resolution.
- ▶ Double-digit medical and total loss dollars reductions percentages.
- ▶ Injured workers return to work sooner.
- ▶ Increased cost savings, increased productivity as well as improvements in morale.

Lombardi Clinical Differentiators

- ▶ Reports developed using **YOUR** preferred format only with no additional “required” reporting (**lowering your claims costs**).
- ▶ Delivered on time according to **YOUR** guidelines (**lowering your claims costs**).
- ▶ Using **YOUR** preferred method of communication, delivery of up-to-the-minute and immediate case management interventions and findings (**lowering your claims costs**).

<https://>

¹ For The N Factor: How Nurses Add Value to Workers Compensation Claims; www.claimsjournal.com/news/national/2015/06/12/263886.htm

Case Management Indicators

TELEPHONIC CASE MANAGEMENT INDICATORS:

- ✓ Facilitation of the return-to-work protocol, either in a modified capacity or full duty.
- ✓ Determination of current medical status.
- ✓ Management of claims with extensive diagnostic testing or imaging.
- ✓ Oversight/management of claims with prolonged or questionable treatments.

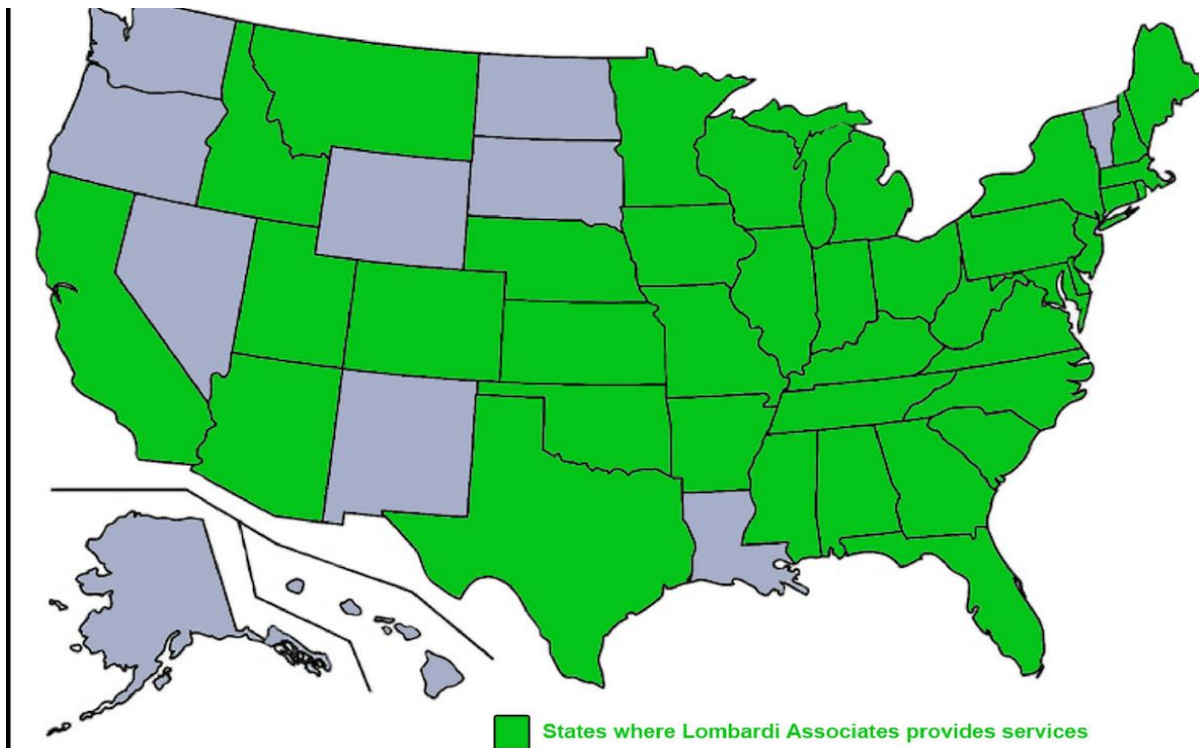
FIELD CASE MANAGEMENT INDICATORS:

- ✓ Suspected fraud.
- ✓ Multiple Providers involved in one claim.
- ✓ Claimant history of previous injuries.
- ✓ Ongoing treatment with no return to work plan.
- ✓ Treatment exceeds and/or falls outside of evidence-based guidelines.
- ✓ Psychological status is in question.

CATASTROPHIC CASE MANAGEMENT (CAT) INDICATORS:

- ✓ TBI
- ✓ Crush injuries
- ✓ Multiple Surgeries
- ✓ Multiple Trauma
- ✓ Amputations
- ✓ Burns
- ✓ Ventilator
- ✓ Coma
- ✓ Blindness
- ✓ Spinal Cord Injury
- ✓ Toxic Exposure

Where you need us, when you need us: Lombardi Associates Management Solutions Coverage



Don't take our word for it:

"I cannot thank you enough for the assistance and detail your nurse has had on this file. Completely nothing that I'm used to with other vendors."

Insurance Carrier Claims Administrator

"Thank you for your quick response to our emergency situation."

Construction Company Safety Director

"THANK YOU!"

Field Claims Specialist

"We have had a wonderful working relationship with Lombardi. I could not ask for more personalized service from your Director of Nursing!"

Trust Fund Administrator

Case Management Options

- ▶ Catastrophic Case Management
- ▶ Field Case Management
- ▶ Telephonic Case Management
- ▶ Task Assignments

CRISIS MANAGEMENT

PURPOSE:

Support people and organizations exposed to work and personal related trauma to significantly decrease the long term detrimental psychological effects on the individual employee, company and/or organization.

Our Crisis Team:

National and Multi-disciplinary. Team members are clinically trained in trauma recovery and come from diverse professional backgrounds including:

- ▶ **Medical Doctors**
- ▶ **Licensed Clinical Social Workers**
- ▶ **Psychologists**
- ▶ **Fire Fighter**
- ▶ **Army Chaplain**

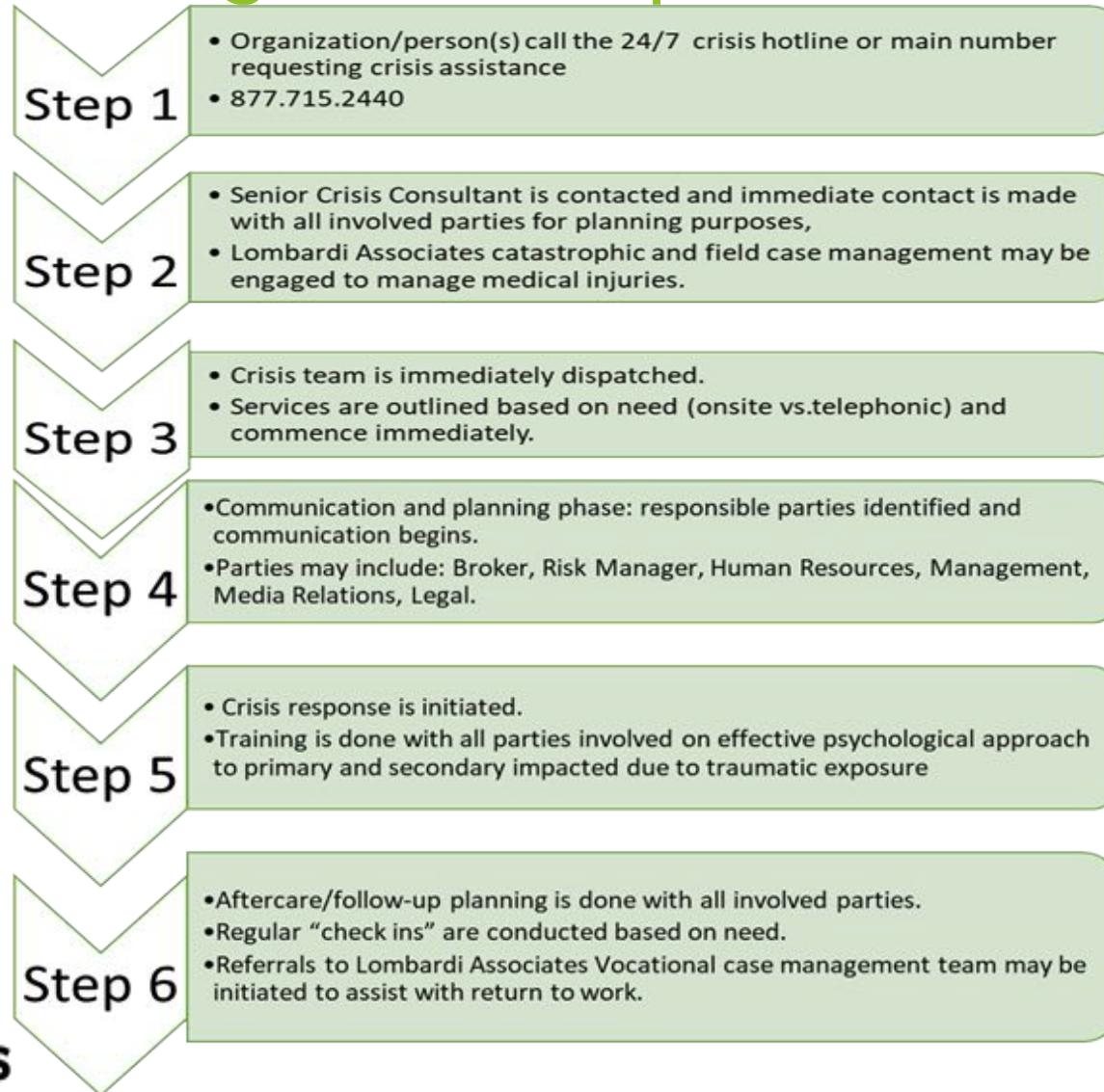
The team is led by a Senior Crisis Consultant who has over thirty years of direct crisis management experience.

WHERE WE HAVE SERVED:

We have served numerous organizations, person(s) and groups across the country.

- ▶ Boston Marathon Bombing
- ▶ Lafayette/Aurora Theatre Shootings
- ▶ Hesston, Kansas Shooting (workplace violence)
- ▶ Las Vegas Mass Shooting
- ▶ Fort Lauderdale Airport Shooting

Crisis Management Response Flowchart



Crisis Management - Active Shooter Training

- ▶ A comprehensive review of nationally recognized response options when involved in an Active Shooter situation.
- ▶ Our program is a compilation of proven techniques for civilians to employ in active shooter situations.
- ▶ The program combines nationally recognized concepts with extensive tactics knowledge in an easy to understand format.
- ▶ Instructors with over twenty (20) years of Law Enforcement tactical experience.
- ▶ Not just classroom academics, rather, practitioners in the field with a unique perspective gained from **managing and dealing with Actual Active Shooter Situations.**

Active Shooter Training Course Offerings

- ▶ Active Shooter Response Options for Civilians-Basic Level
- ▶ Active Shooter Response Options for Civilians-Executive/Management Level
- ▶ Active Shooter Response Drills
- ▶ Active Shooter Response Table-Top Training Exercises
- ▶ School Resource Officer (SRO) Training

Crisis Management

Organizational Resiliency

Organizational Resiliency planning is focused on keeping companies and employees healthy, thriving and profitable.

Lombardi can help prep a company before a crisis:

- ❖ **Cultural sensitivity in the workplace**
- ❖ **Suicide awareness and prevention**
- ❖ **Active shooter training**
- ❖ **Sudden loss**
- ❖ **Downsizing/Morale**
- ❖ **Reputation concerns**
- ❖ **Inappropriate comments and behavior**
- ❖ **Sexual harassment**
- ❖ **Bullying**
- ❖ **Social media**

VOCATIONAL REHABILITATION

Focused on returning people to work, play and life

- ▶ Lombardi Associates' Forensic Rehabilitation Counselors determine losses associated with injuries and provide expert testimony to support results.

We specialize in evaluations for:

- Residual employability.
- Lost earnings capacity.
- Lost capacity to perform household duties.
- TID (Total Industrial Disability) Assessment.

Vocational Services:

- ▶ Forensic Vocational Assessments
- ▶ Wage Earning Capacity Evaluations
- ▶ Labor Market Surveys
- ▶ TID (Total Industrial Disability) Assessments
- ▶ File Review
- ▶ Job Lead Follow-up Services
- ▶ Comprehensive Vocational Assessments
- ▶ Vocational Placement/Job Placement Services
- ▶ Job seeking Readiness Tasks
- ▶ Transitional/Light Duty Assignment
- ▶ Functional Job Analysis

LITIGATION MANAGEMENT

Litigation management solutions for attorneys, employers, insurance carriers and third-party administrators.

Lombardi Associate's Certified Legal Nurse Consultants work to contain the spiraling costs associated with litigation, facilitate case closure and mitigate claims exposure.



Lombardi Associates' Litigation Management Areas of Expertise:

- ▶ Divorce Law
- ▶ Product Liability
- ▶ Medical Malpractice
- ▶ General Liability
- ▶ Employment Law
- ▶ Personal Injury
- ▶ Workers' Compensation
- ▶ Expert Witness Testimony
- ▶ Depositions/Trials
- ▶ Auto/PIP
- ▶ Long- and Short-Term Disability
- ▶ Reinsurance
- ▶ Elder Law
- ▶ Special Needs

LITIGATION MANAGEMENT SOLUTIONS

LEGAL NURSE CONSULT

- ▶ Records Retrieval
- ▶ Screen/Investigate Cases for Merit
- ▶ Chronologies; Verbal/Written Reports
- ▶ Affidavits of Merit
- ▶ Interpret/Organize Medical Records
- ▶ Extensive Record Review to Address Causality
- ▶ Define Standards of Care
- ▶ Attend Independent Medical Examinations

LITIGATION MANAGEMENT SOLUTIONS

LIFE CARE PLANNING

- ▶ Lifetime Plan for Settlement
- ▶ On-site Evaluation of Injured Individual if Warranted
- ▶ Customized reports based on Review of Medical Records and Interviews
- ▶ Life Care Plan Critiques
- ▶ Collaborate with Medical Providers, Case Managers
- ▶ Medical Cost Projections for Reserves

LITIGATION MANAGEMENT SOLUTIONS

MEDICARE SET ASIDES

- ▶ Certified Consultant Medicare Set Asides
- ▶ Cost Analysis of Amount of Dollars to Be Set Aside for Medicare

COST MANAGEMENT

- ▶ Lombardi Associates' Cost Management Services include comprehensive and expert analyses which generate reliable, evidence-based recommendations to positively manage the medical portion of a large loss claim.
- ▶ When it comes to complex claims, an accurate evaluation to identify the value of a claim can only be reached with the kind of comprehensive research and analysis that comes from Lombardi Associates' Life Care Plan/Medical Cost Projection services. The recommendations from our highly credentialed nurse experts, along with their local jurisdictional prowess, create a rock solid analysis that allows Payers to accurately set reserves for the life of the claim.

COST MANAGEMENT SOLUTIONS

MEDICAL COST PROJECTIONS

- ▶ Utilized to reserve lifetime costs or early in the case to determine costs up to one year.
- ▶ Customized reports based on review of medical records and payment records in collaboration with medical providers and case managers when applicable.
- ▶ Reports will identify non-injury related medical issues, medications, and treatment.
- ▶ Standard life expectancy tables are utilized with recommendations for obtaining rated age made when appropriate.
- ▶ On-site evaluations performed as requested.

COST MANAGEMENT SOLUTIONS

LIFE CARE PLANNING

- ▶ LCP Review offered from a defense perspective. Lombardi certified specialist reviews the plaintiff's LCP to verify accuracy and to present testimony if needed.
- ▶ Determine detailed lifetime projected medical costs for an injured party for settlement purposes.
- ▶ Customized complex reports based on review of all available medical records.
- ▶ Standard life expectancy tables are utilized and recommendations for obtaining rated age made when appropriate.
- ▶ Researched costs utilizing extensive online database.
- ▶ All plans are completed by a Certified Nurse Life Care Planner credentialed to testify in court as needed.
- ▶ Average completion time 30-45 days.
- ▶ Average 25-40 hours to complete.

COST MANAGEMENT SOLUTIONS

LIFE CARE PLAN REVIEW

- ▶ Comprehensive review of plaintiff life care plan to ensure appropriateness.
- ▶ Recommendations for obtaining a rated age will be made when appropriate.
- ▶ Customized report will separate non-injury related medical issues, medications, and treatment.

COST MANAGEMENT SOLUTIONS

MEDICARE SET ASIDES

- ▶ An arrangement between settling parties of a Worker's Compensation Claim in order to protect Medicare's interest when settling future medical benefits.
- ▶ A cost analysis of the amount of dollars that should be set aside in an interest bearing account for future injury related medical expenses of the type typically covered by Medicare.
- ▶ Allocations are based on rated age of the injured party and provide cost of non-Medicare items covered in the settlement with inflation factors considered.
- ▶ Medicare Set Asides are performed by Life Care Planners and Medicare Set-Aside Consultant Certified.
- ▶ Lombardi Associates are experts in Medicare Conditional Payment assignments.

Lombardi Associates mission is clear: to treat every injured worker with the utmost integrity while minimizing costs through our skilled case management.

We always remember each person is special and deserves the highest level of care.

We engage our unique team of premier medical professionals and make certain that every case is handled proactively-right from the start.

Thank you!

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