



[Workers' Comp](#)

# Close More Files at Year End with Field Case Management

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2 MIN READ

As the year winds down, inboxes fill up, providers take time off, and everyone wants to know when the claim will close. That slows progress when you already carry a full inventory. Use targeted field case management tasks to move stalled files, clear barriers, and give yourself time back so you start the new year with fewer open questions and fewer open files.

## Why year end is the right moment

The final weeks of the year often tighten provider schedules, reduce light duty options, and delay settlement while key stakeholders are out. Field case managers keep recovery plans visible, coordinated, and moving. They act as clinical partners in the field, align providers, employers, and injured employees to one plan, and keep you out of the cycle of chasing updates or rescheduling missed appointments.

## Targeted field case management tasks for year-end closure

- **Lock in critical appointments and testing.** Secure post-op follow-ups, key specialist visits, and diagnostics before year end. Coordinate schedules, confirm attendance, and fast-track reports so you are not hunting for results in January.
- **Close documentation gaps for settlement.** Compile current treatment summaries, permanent impairment ratings, work status, and provider opinions into one concise clinical summary that supports negotiation and reduces back and forth.
- **Verify return to work status with an employer visit.** Meet on site, review essential job functions, compare them to provider restrictions, and identify realistic transitional duty options so you can update plans with confidence.
- **Remove noncompliance and hidden barriers.** Investigate missed appointments, transportation issues, pain concerns, family stressors, or confusion about the treatment plan. Address them with the injured employee and provider to prevent avoidable delays from spilling into the new year.
- **Reassess complex cases with a focused clinical review.** Review the file, attend a key appointment, clarify diagnoses and goals, and recommend next steps tied to evidence-based care and functional recovery. Decide whether to progress, settle, or redirect.

- **Plan ahead when return to work is unlikely.** Use vocational case management to map transferable skills, surface potential employers, and gather information that supports settlement. Starting before year end prevents drift once the calendar turns.

### **Start the new year with control**

Using field case management in the final stretch reduces surprises, shortens timelines, and creates clear paths for the claims that remain open. Flag files with uncertain appointments, missing documentation, unclear work status, or no next step. Assign a targeted field task this week. Start January with fewer loose ends and fewer open files.



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