

WORKING UP THE CASE

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INTAKE

- Fact Finding (Police Report, Witness Info, Lost Wage Info, etc.)
- Administrative (Fee Agreement, Med Auth, Checklist)
- Client Evaluation (It's OK to say "No thanks" and send a CYA Letter)
- Client Prep/Expectations (Value & Time)
 - Social Media/Blogging
 - Medical Compliance
 - Wages – Duty to Mitigate Damages (get back to it)
 - Medical Referrals ????

FOR POLICE REPORTS GO TO:

<https://cris.dot.state.tx.us/public/Purchase/>



SETTING UP THE FILE

Letter of Representation to Liability Carrier

Letter of Representation to UM/UIM & PIP Carrier (Demand
Written Rejection of Benefits)

Checklist



NEW CLIENT CHECKLIST

Fee Agreement	_____
Medical Authorization	_____
Lost Wage Verification	_____
Client Info	_____
Client letter	_____
Client List (w/ DOB)	_____
Police Report	_____
Photos	_____
LOR	_____
Medicals w/ Affidavits	_____
Medicals w/out Affidavits	_____
LOP	_____
Demand to be sent	_____
File Suit / No Demand	_____
Medicare/Medicaid Notice	_____
Liens/Subrogation	_____
PIP	_____
UM/UIM	_____



SETTING UP LIEN FILE

MEDICARE

To set up claim:

855-798-2627

NGHP

PO Box 138832

Oklahoma City, Oklahoma 73113

Fax (405) 869-3309

(SEND FEE AGREEMENT & HIPAA AUTHORIZATION)

<http://go.cms.gov/attorney>



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Also available as part of the eCourse

[2016 The Car Crash eConference](#)

First appeared as part of the conference materials for the
2016 The Car Crash Seminar session

"Working Up the Case"