

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>



MEDICAID

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TMHP

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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"