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How to up-date Clients After Completing Treatment

Step 1: Once treatment is done go over the remaining process with your client

* Mention the providers listed, I see that you went to XY places. Is there more?
* Order medical and billing Records
* Check to see if all records are on file
* Send case to demand
* When demand package is completed email to adjuster
* Start the negotiation process

Step 2: contact client twice a month during the record collection.

* Ask how they are doing and give status……
* If you are having issues receiving records from a provider, they need to know so they don’t feel they are being left in the dark.
  + Letting the client know can be beneficial, sometimes they can put pressure on the provider to send the records a lot faster.

Step 3: Contact client once you have received all records and will be sending the case to the legal team to draft the demand package.

* Do not give time frame on when is the package will be done or sent out unless you are 100% sure.
* When they are in the demand stage that does not mean the demand package will be worked on the day of.
  + Client will be put on a list to be assigned to a legal assistant and that can take about a week or so before they start on the demand package.

Step 4: Contact client once a month if the demand package is taken long and update them on what is causing the hold up.

* Communicate
* Demand package can take long due to missing chart notes, missing billing date, or missing wage loss authorization.

Step 5: Contact client once the demand package is sent out.

* Let them know that the insurance company will have 30 days to acknowledge our demand.
  + Make sure to reach out to the adjuster 10 days after the demand is sent out to make sure they received it.

Step 6: Contact client if we never receive acknowledgment from the insurance or if the demand package had to be resent.

* This will only happen if the adjuster that demand package was sent to is no longer with the company and we didn’t have the new adjuster information.

Step 7: Contact client when we receive offers

* You do not have to let them know what the offer is unless they ask.
  + Just let them know that we received 1st, 2nd ,3rd, etc.… offer and that we rejected that offer due to being a low offer.

Step 8: Contact client once we receive final and last offer

* Let them know that we received final offer and that we will go over the case to see if the offer is worth settling or if we have a chance for a higher offer.

Step 9: Contact to go over the accounting and have client decide if they would like to settle with the final offer or if they want to take it to court to try to get a higher settlement.

* This is the client’s choice we can advise them on what will benefit them if they ask
  + Also consider if the case goes to court legal fees will be increased from 33.3% to 40%