



Best Practices for a Medicare Set-Aside



BEST PRACTICES FOR AN MSA

Preparing any Medicare Set-Aside (MSA) is to prepare a precise and reasonable allocation. This all starts with the documents we receive during the preparation process. When we receive a complete set of records, our team of nurse allocators is able to provide a high level of service.

This guide will help you understand which documents are most helpful when requesting an MSA allocation.

REQUIRED AUTHORIZATION

CMS requires a full executed CMS Consent to Release Form if the Medicare Set-Aside is submitted through the voluntary Workers' Compensation Medicare Set-Aside review process. Be sure to obtain this form even if you are not confident the set-aside will be submitted. Changes can be made to this form at any time. Ensuring you have the correct form and all blanks are completed is essential.

TREATMENT RECORDS

Include a complete set of the following:

- All medical records related to the work injury. Records often not submitted include those from emergency personnel responding to an accident scene.
- The last two years of medical records related to the injury. Ensure a treatment plan from the treating doctor is included in these records.

PHARMACY RECORDS

It is essential to include a copy of the injured party's current pharmacy records that outline the prescription medication and the frequency and dosage of such medications.





Claim Payment History

Issues of primary liability are essential to review in preparing a Medicare Set-Aside. The inclusion of the following is required to complete an accurate allocation:

- Itemization of injured body parts and whether they are admitted or denied;
- Payment itemizations for all medical and indemnity benefits paid; and
- Statement on why a body part or condition was admitted and subsequently denied.

Additional contact with the claims professional may be needed to complete the allocation.

Other Documents

Other documents may be included in a Medicare Set-Aside. These can include copies of specific statutes or fee schedules. Reviewing the allocation to ensure it was prepared using the correct information is critical.

- First Reports of Injury;
- Prior Settlement Agreements; and
- Draft of the pending settlement agreement.

When identified, copies of applicable Statutes of Limitation or other statutes limiting liability for future medical care may be identified and included by the allocator.

MSA Source is an innovative Medicare Set-Aside company that helps clients navigate the claim process with complete confidence. Our experienced teams of nurses, doctors, and attorneys work together to sure the best possible results for every customer we serve.

Please contact us with any questions.





MSASOURCE.COM | 888-4MSA (4672)
REFERRALS@MSASOURCE.COM



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