

Subrogation Checklist

Use this Subrogation Checklist to keep track of all steps required in your process to obtain, negotiate, and finalize subrogating insurance liens, including Medicare Secondary Payer Recovery.

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Step-by-Step Subrogation Checklist – ALL CASES

Case Name (Beneficiary/Insured Name)	1	2	3	4	5	6	7
Lake v. Pine View Center (Valerie Lake)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Smith v. Warren Smith, MD, et al. (Bernie Smith)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Thompson v. Cherry Hill Clinic, et al. (Dave Thompson)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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7-Steps: Obtaining, negotiating & finalizing

1. GET A HANDLE ON IT – Immediately identify all possible lienholders and start an index.
2. CLIENT DISCUSS – Inform your client of what liens may require reimbursement and what the reporting and repayment process entails.
3. SEND LETTERS OF REP – Prepare and send out letters of rep to each lienholder.
4. WAIT FOR FEEDBACK – Within 45-days form the date your letters of rep are received; you should start to get responses from subrogating lienholders.
5. AUDIT & DISPUTE – Audit all itemizations and dispute what doesn't belong.
6. NEGOTIATE & FINALIZE – Report settlement details and request the final demands.
7. PAYOUT – Pay all lienholders.