

	Medicare Set Aside	Mini MSA	Medical Cost Projection	Limited Cost Projection	Life Care Plan
Referral Source	Carriers, TPAs, Attorneys, Self-Administered	Carriers, TPAs, Attorneys, Self-Administered	Carriers, Reinsurance Carriers, Legal Mediation	Carriers, TPAs	Attorneys, Carriers, TPAs, Self-Administered
Line of Insurance	Workers' Comp, Liability, Personal Injury	Workers' Comp	Workers' Comp, Liability, Personal Injury	Workers' Comp, Liability, Personal Injury	Workers' Comp, Liability, Personal Injury
What is the Report Used For?	Protecting Medicare's interest during the settlement process	Assisting with reserve setting and potential settlement	Reserve setting, settlement negotiations	Determining cost of procedure, treatment or episode of care	Preparing for trial /expert testimony; document lifetime costs
Cost Projection Basis	Strictly confined to the medical records of treating physicians for most recent 2 years of treatment	Confined to medical records or treating physician; Most recent year of treatment	Medical records and usual and customary treatment; Calculated at fee schedule or other state regulations	Specific procedure, treatment or episode of care	Based on medical records, assessments and legal documents. Calculated at fee schedule upon request
Scope of Projection	Life expectancy using rated age when appropriate	Life expectancy	Life expectancy; rated age only by request	Single episode of care or specific period of time	Life expectancy
Claimant/Provider Contact	None, not permitted	None, not permitted	Claimant contact not required; providers contacted to verify costs	None	Plaintiff cases in person assessment; defense cases medical records only
Records Needed	Medical records—last 2 complete years; claims payment history; pharmacy history accepted/denied diagnoses and related court decisions	Most recent year of medical treatment; claims payment history and pharmacy history; accepted/denied diagnoses	Past 2—3 years medical records; All IME's claims/pharmacy payment but not necessary	Name of surgery or treatment or medicals for specified period of time	All medical records, expert reports, legal documents, depositions, education, vocational and economic documents
Credentials of Report Preparer	Certified Medicare Set Aside Consultant (MSCC)	Certified Medicare Set Aside Consultant (MSCC)	Certified Life Care Planner (CNLCP or CLCP)	Certified Life Care Planner (CNLCP or CLCP)	Certified Life Care Planner (CNLCP or CLCP)
Cost to Referral Source	Flat rate per Genex fee schedule	Flat rate	Average 10—20 hours of work per Genex fee schedule	Usually 2—3 hours unless treatment is complex	Average 30—50 hours of work per Genex fee schedule
Report Completion	10 days standard	2—5 days from receipt of complete medical records	30 days or less	10 days standard	60 days or less
Genex Advantages	Cost driver letter provides options for reducing MSA costs and/or facilitating submission process	Cost driver letter provides options for reducing MSA costs before settlement or full MSA	Procedures with costs that may be ordered in the future added for information only	Documents cost for accurate reserve setting	Non-medical issues can also be addressed such as vehicle adaptations and/or home modifications

For more information contact: