

Requesting final lien is one of the tasks of a legal assistant in a personal injury law firm. Your task is to prepare a SETTLEMENT NOTICE to Health insurance lien holders.

- Open Case management or [CLICK HERE](#)
- Go to Liens tab, either on left pane, or tabs below the sheet.
- Look for Final Lien LOR, and download word format

Edit the letter accordingly

Take note:

- Name format, the first letter is in Caps
- If you see a colon, always 1 tab spacing. (Except E: section and Enclosure.)
- For amounts or numbers, for thousands use comma as separator. And use decimal .00 if it's even
- For Dates, use long complete words for months
- Don't change the formatting of the text like, font, positioning, and sections.

- Letter should be dated today

#### **RECIPIENT ADDRESS SECTION**

- Edit send method via email, remove those methods that are not needed
- Go back to case management and go to liens tab. Look for Lien Holder name. Go back to the letter, below the send method, put the lien holder name.
- Go to Case management liens tab, Look for Analyst section, copy the analyst name and email.
- Go back to the letter, beside ATTN , add the analyst name (BOLD AND ALL CAPS)
- Under E: section, add the analyst email (BOLD)

#### **RE OR REFERENCE LINE**

- To get the client details, go to case management, click home, go to the upper portion of the page with client's name and click it. You will be redirected to the client's contact card.
- Add all client's details needed on the RE portion of the letter (DON'T BOLD)
- Member ID and Event number can be found on the case management liens tab. (DON'T BOLD)
- Date of accident is located on case management home or intake tab (DON'T BOLD)

#### **SALUTATION**

- The To section should be the prefix followed by the Analyst's last name, and colon.

#### **BODY 1<sup>st</sup> PARAGRAPH**

- Go back to case management, and click insurance tab.
- Under Insurance type, look for third party insurance. Copy the insurance company
- Go back to the letter and look for parenthesis section called insurance company, edit and add the insurance company name you copied on the case management third party insurance. Don't include the parenthesis.

#### **BODY ITEMIZED SECTION**

- Last date of treatment can be found on case management under treatment tab.
- Settlement date can be found on the case management settlement tab

- Attorney fee is 33.33%
- Medical bills should be the total charges on case management treatment tab.
- Settlement amount can be found on case management settlement tab
- UM limits is in case management insurance tab, under first party insurance type.
- 3P limits is in case management insurance tab, under third party insurance type.
- Injuries are under case management intake tab.

#### **BODY 3<sup>rd</sup> PARAGRAPH**

- On the letter, under blank \$, Look for lien amount on case management liens tab, and add the amount to the letter.

#### **SIGNATURE BLOCK**

- Edit signature block with your name, position as Legal Assistant , and your personal email

#### **ENCLOSURE**

- After enclosure add Police Report
  
- Save the letter as PDF format.
- Rename the file to your complete name hyphen Settlement Notice
- Go back to case management intake tab. Under investigation attachment and download Police report.
- Merge Settlement letter PDF and Police report to become a one letter. Proper order - Letter first and Police report.  
*(If you don't have a PDF editor app, you can go to <https://smallpdf.com/merge-pdf> , upload the letter and police report at the same time, drag the documents based on the proper order above, and click merge. Once done merging, click download.)*

Make sure your file name is correct. Be mindful.