



MEDICARE SET-ASIDE SELF-ADMINISTRATION CONSULTATION SERVICE

Protocols, LLC offers a Medicare set-aside consultation service (MSA Consult) for self-administered Medicare set-asides. The MSA Consult provides parties to a settlement with an alternative to expensive custodial administration without leaving claimants to find their own way through the Medicare morass. The MSA Consult provides claimants administering their own Medicare set-aside accounts with information regarding Medicare set-aside administration, CMS requirements, and support for determination of Medicare coverage for the claimant's particular workers' compensation injury based on the settlement.

The MSA Consult includes:

1. An introductory letter to the claimant advising of their responsibilities for administration of their set-aside.
2. A memorandum regarding CMS requirements for self-administration of set-aside funds.
3. Follow up correspondence to the claimant providing specific guidance regarding administration of their set-aside account including covered diagnoses, procedures and services, and recommendations for payment amounts, based on their injury, the settlement and agreed upon Medicare set-aside.
4. An initial one hour telephone call with claimant to outline administration, discuss procedures for administration of the account, and address questions that the claimant may have.
5. Accounting instructions and forms for reporting account activity to CMS annually.
6. Review of first year accounting and feedback to claimant prior to submission to CMS.
7. Form letters for claimant's use to transmit annual accounting to CMS.
8. Initial notification to CMS/COB regarding Medicare set-aside funding and self-administration.
9. Form letters for claimant to notify providers of self-administration of the set-aside, together with Form 1500 for provider billing to claimant.
10. Up to five hours of telephone consultation with claimant regarding Medicare coverage of services within 12 months of engagement.

The MSA Consult is offered for a one-time charge of \$1,000.00, which includes all of the above services.