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**Items that are needed in order to determine a Medicare Set-Aside Allocation:**

- First Notice of Injury/Loss
- Last 2-3 years of medical payouts
- Last 2-3 years of medical reports from all treating sources
- Any medical documents stating Maximum Medical Improvement
- Completed assignment sheet (online, faxed, or mailed)
- Pharmacy Summary – Include last 6 months of Pharmacy claims

**Items needed if CMS approval is to be determined:**

- Estimated settlement amount
- Any Medicare/SSA correspondence regarding benefit entitlement
- Settlement or scheduled mediation/hearing date with estimated amount
- Method of administration of CMS allocation (self, custodial acct., or trust)
- Court order that identifies relationship or denial of specific treatment
- Social Security release (DWC-14 or SSA 3288)/ General release