**When to Refer Cases**

1) New Cases

a. At the same time as the submission of the letter of claim

2) Existing Cases

a. Following a case review

b. On admission of Liability

c. On receipt of Medical Evidence

**How to Refer Cases**

1) Introduce Medicess to Defendant and inform Client.

2) Case referral options:

a. Complete & Email the Medicess referral form to **cases@medicess.co.uk**

b. Complete on-line referral form at **www.medicess.co.uk/refer**

c. Call us **(01256) 341660**

3) Useful attachments:

a. Letter of Claim

b. Medico legal reports/ medical notes.

**What Happens Next**

1) We will call you to discuss the case and agree a plan.

2) We will complete Rehabilitation Review for you to agree.

3) We will distribute the Review to the defendant and secure joint instruction (JI).

4) We will notify you when joint instruction is agreed.

5) We will contact your client to make arrangements for an INA.

**What happens after 2 weeks or if JI is refused**

We will contact you to agree a plan:

1) Options for Liability admitted Cases

a. Single Instruction

b. Medicess funded face to face INA\*

c. Diary Case.

2) Options for Liability assured Cases

a. Single Instruction

b. Medicess funded telephone INA\*

c. Diary Case.

3) Options for liability unknown Cases

a. Single Instruction

b. Diary Case.

*\* all funded INAs are subject to a risk assessment and agreement by Medicess.*