

Instructions for Completion of Claimant Attorney Memorandum and Defendant Settlement Summary Forms

It is recommended that the form be saved as a template to your own data system. For each submission to the Commission, please rename with a unique name referencing the subject claimant/client.

After entering data into a cell, advance to the next cell with the [tab] button.

Note that each cell has properties that may limit the number of characters and whether the entry must be alpha or numeric. These properties, and the form itself, are protected but not *password* protected; additional rows may be added when protection is turned off.

Ledger of Benefits Paid and Disputed:

The Ledger of Benefits Paid and Disputed [Appendix 5A] shall be attached to the settlement document per the instructions in JRP Rule 18.

- A Ledger of Benefits Paid and Disputed must be submitted for each claim where money is allocated. A ledger is only necessary on a medical only claim if it's the sole claim on the settlement. Each settlement must include at least one Ledger of Benefits Paid and Disputed.
- If multiple claims are being settled, the amount of consideration (Section III) on each Ledger of Benefits Paid and Disputed combined should match the total consideration paid for all claims.
- After completing the Exhibit, print and attach to the settlement document.

Claimant Attorney Charging Lien:

It is recommended that the form be saved as a template to your own data system. For each submission to the Commission, please rename with a unique name referencing the subject claimant/client.

Send as an attachment to: settlements@iic.idaho.gov

NOTE: Do **NOT** include confidential attorney/client privileged information in the Claimant's Attorney Charging Lien. They will become part of the official Commission record in this case and may be disclosed later in accordance with the provisions of the Idaho Public Records Law, the Judicial Rules of Practice and Procedure, or the Idaho Rules of Civil Procedure.