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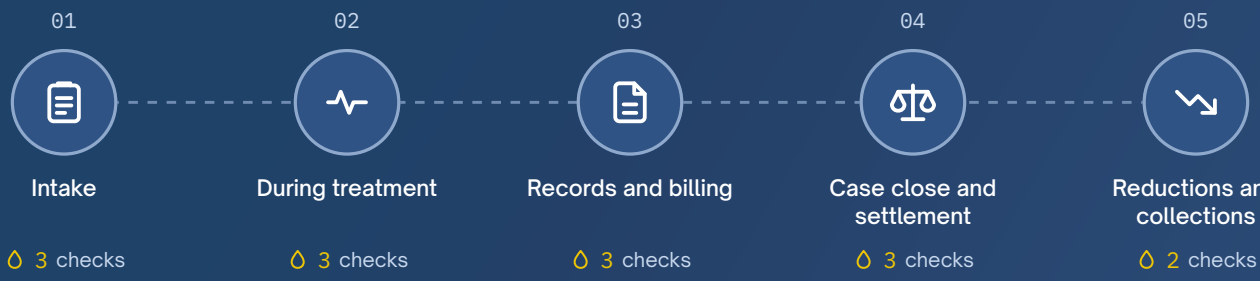
The Lien Billing Leak Checklist

14

14 places PI clinics lose lien revenue, and how to catch each one while the case is still open

For owners and office managers at personal injury clinics (chiro, PT, pain management, ortho, and medical) that treat on liens or letters of protection (LOPs).



Most lien revenue isn't lost in one big mistake. It slips out in small gaps: a lien that never got signed, a firm change nobody heard about, a records request that sat for two weeks, a case that settled while you were waiting for a call. Go through this list with your team and check off what you already do every time.

STAGE 1

Intake

01 **A signed lien or LOP is in the chart before the first visit.** ☐

WHY IT LEAKS An unsigned lien usually turns up at settlement, which is the hardest time to fix it.

02 **The attorney, firm, case manager, and claim number are confirmed with the firm on day one, not just taken from the patient.** ☐

WHY IT LEAKS If the firm on file is wrong, your bills and lien notice go to someone who has no reason to pay them.

03 **The patient signs a financial agreement that says what happens to the balance if the case is dropped, lost, or the attorney withdraws.** ☐

WHY IT LEAKS Without it, a case that ends without a settlement often ends without a payment too.

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STAGE 2

During treatment

04 **Every open case is checked for an attorney change at least once a month, and the new firm gets your lien and balance.**

WHY IT LEAKS When a client switches firms, the new firm may not know your lien exists unless you tell them.

05 **The firm hears about missed visits and gaps in care when they happen.**

WHY IT LEAKS Gaps give the insurer a reason to question your bills, and a firm that finds out late can't explain them.

06 **Case status (treating, demand sent, negotiating, in litigation, settled) is updated on a set schedule, with a name next to each case.**

WHY IT LEAKS If nobody owns the follow-up, the first status update you get may be that the case closed months ago.

STAGE 3

Records and billing

07 **Every records request is logged with the date received, the date sent, and who sent it.**

WHY IT LEAKS A request that waits two weeks holds up the demand packet, and your bill waits with it.

08 **Notes and narrative reports are finished and signed before records go out.**

WHY IT LEAKS Incomplete or unsigned records get sent back, or get used against the bill in negotiation.

09 **An updated itemized bill goes to the firm after each phase of care, and a final one at discharge.**

WHY IT LEAKS If the demand goes out with an old balance, the visits after it are much harder to collect.

STAGE 4

Case close and settlement

10 **When a patient is discharged, the firm gets the final bill, final records, and a copy of the signed lien in one package.**

WHY IT LEAKS This is your best chance to be in the demand, and partial packages tend to get set aside.

11 **Each firm has agreed to tell you in writing before settlement funds are paid out.**

WHY IT LEAKS Once the money has gone out, payment gets harder to track.

12 **You know the key case dates, like the statute of limitations, and confirm them with the attorney's office.**

WHY IT LEAKS If nobody on your side knows the key dates, there's no point at which anyone checks in with the firm.

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STAGE 5

Reductions and collections

13 **Every reduction request is logged: amount billed, amount asked, amount agreed, and who approved it.**

WHY IT LEAKS Reductions that nobody tracks add up, and you can't see which firms ask for the most.

☐

14 **Liens with no status update in 60–90 days get a follow-up, and dropped or withdrawn cases move to a patient balance right away.**

WHY IT LEAKS An old lien with no follow-up date tends to stay open forever and never get paid.

☐

Your score

Count your checks.

0	1	2	3	4	5	6	7	8	9	10	11	12	13	14

0–7

Lien revenue is probably slipping out in several places. Start with intake and case status. They're the cheapest to fix and protect everything after them.

8–11

You're catching most of it. The gaps are probably in the middle of the case (firm changes, status updates, records requests), where things get busy.

12–14

Your lien process is tight. Look at the boxes you left blank first.

How Ambula helps with this

Most EMRs weren't built for PI case management, so clinics track liens in a spreadsheet and juggle several systems to follow one case. That's where things slip.

Ambula is an EMR built for personal injury clinics, with about 8 years in PI med-legal. Intake, charting, liens, records, and billing stay on one case file, from the accident to the settlement.

- **Lien signatures you can see.** Patients and attorneys each get their own signing link by text or email, and a lien report shows which side still needs to sign. Stage 1
- **The firm and status on every case.** You can see which law firm is on each case and whether it's open or closed. Attorney changes and status changes are tracked, so you can see when a case moved. Stages 2 and 4
- **A law firm portal.** Firms sign in at lawyers.ambula.io to see the records and bills you choose to share, so fewer calls come in asking for them. Stages 2 and 3
- **Reductions on the bill.** Reductions are recorded against the bill along with settlement payments. Stage 5

See it with one of your own cases.

Get a demo and bring a real case. We'll walk it from referral to demand packet.

Get a demo

ambula.io/request-demo

This checklist is general operations guidance, not legal advice. Lien and LOP rules vary by state, so check specific practices with your attorney.