

Updated Forms For SAGA Practice Manager, 2008

The 2008 update consists of 170 forms and 6 User Defined Merge Codes. (UDMCs). These forms have been extensively revised, rewritten and updated. They are provided in both Word and Wordperfect format. Forms in italics below are new.

Arbitration Forms

ARBITRATION - Demand For Arbitration, SUM/UM/UIM

Authorizations to Hospitals

AUTHORIZATION – HIV Related Information

AUTH - MED MAL - Letter to Ins Co for Records

AUTHORIZATION - For Infant-Plaintiff's hosp recs - DEF OCA HIPAA

AUTHORIZATION - For Infant-Plaintiff's hosp recs - US OCA HIPAA... ..

AUTHORIZATION - For Plaintiff's hospital recs - DEF OCA HIPAA

AUTHORIZATION - For Plaintiff's hospital recs - US OCA HIPAA

AUTHORIZATION – NYC HHC – OCA HIPAA - US.....

AUTHORIZATION – NYC HHC –OCA HIPPA – DEF

Authorizations to Physicians

AUTHORIZATION - For Defendant's Carrier to Obtain Dr's records – OCA HIPAA

AUTHORIZATION - For plaintiff's med recs DEF – OCA HIPAA

AUTHORIZATION - For plaintiff's med recs US – OCA HIPAA.....

AUTHORIZATION - Release Infant's med Records US– OCA HIPAA

AUTHORIZATION - Release Infant's med Records (Def) OCA HIPAA

AUTHORIZATION - Releasing Medical Records US – OCA HIPAA.....

AUTHORIZATION - Releasing Medical Records (Def) OCA HIPAA

Client Letters

CLIENT - Advising of 50(h) Hearing Date.....

CLIENT - Advising of EBT (Court-ordered Date)

CLIENT - Advising of EBT (Noticed Date)

CLIENT - Case Opening Letter

CLIENT - Infant, Advising of Comp Hearing Date

Closing Statement

CLOSING STATEMENT – 6/98 Amend for 1st & 2nd Depts

Letters to Court

COURT - Cover Letter - Filing S&C

Letters to Defendant's Attorney

DEF ATTY - Letter & Stipulation - Withdrawal Affirm Defense

DEF ATTY - Send General Release & Stipulation of Discontinuance

DEF ATTY - Stipulation Adjourning Motion .....	.....
DEF ATTY - Stipulation Consolidating Actions .....	.....
DEF ATTY - Stipulation Discontinuing Action .....	.....
DEF ATTY - Stipulation Extending Time To File N/I .....	.....
DEF ATTY - Stipulation Withdrawing Affirmative Def .....	.....
DEF ATTY – Transmittal Letter to Multiple Attys.....	.....

Letters to Defendant Carrier

DEF CARRIER - Advising of New Firm Name & Address .....	.....
DEF CARRIER - Bad Faith Letter.....	.....
DEF CARRIER - Blank Letter to Def. Carrier.....	.....
DEF CARRIER - Default letter.....	.....
DEF CARRIER - Extending Time To Answer w/Stipulation .....	.....
DEF CARRIER - General Release Letter .....	.....
DEF CARRIER - General transmittal letter .....	.....
DEF CARRIER - Insurance Demand Letter .....	.....
DEF CARRIER - Insurance Payment Request.....	.....
DEF CARRIER - Letter Submitting Medicals .....	.....
DEF CARRIER - Negotiate Case Letter .....	.....
DEF CARRIER - Representation Letter.....	.....
DEF CARRIER - Sending Meds/Specials (2 Carriers) .....	.....
DEF CARRIER - Sending No Fault Authorizations .....	.....
DEF CARRIER - Specials letter

Letters/Forms to Employers

DISABILITY - Disability Form (DB450).....
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Letters/Documents to/for Physicians

COMPROMISE - Physician's Affirmation.....
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Department of Motor Vehicles Forms

DMV - Revoke License Registration of Defendant.....
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Letters/Documents to Hospitals

FIRST REQUEST - For Hospital Records, (Adm. only)
FIRST REQUEST - For Hospital Records, (ER only) .....	.....
FIRST REQUEST - Request Hospital Records.....	.....
FOLLOW UP - For Certified Hospital Bill.....	.....
FOLLOW UP - For Hospital Records .....	.....
FOLLOW UP - For Hospital Records and Bill .....	.....
SECOND REQUEST - For hospital records, (ER only)

Index No. Applications

INDEX # APPLICATION - Bronx County.....
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INDEX # APPLICATION - Kings County
INDEX # APPLICATION - Nassau County
INDEX # APPLICATION - New York County.....
INDEX # APPLICATION - Queens County .....	.....
INDEX # APPLICATION - Richmond County.....	.....
INDEX # APPLICATION - Rockland County .....	.....

Investigative Documents

INVESTIGATION – Corporate Search re Defendant .....	.....
INVESTIGATION – Fax to Division of Professional Licensing.....	.....
INVESTIGATION – Big Apple Pothole.....	.....
INVESTIGATION – MV104 Cover Letter to NYS.....	.....
INVESTIGATION – NY Auto Plan (assigned risk) .....	.....
INVESTIGATION – Postmaster for Defendant’s Address.....	.....
INVESTIGATION – Record Abstract, Last Owner Search.....	.....
INVESTIGATION – Request Plaintiff’s recs from Kings County DA.....	.....
INVESTIGATION – Request Plaintiff’s recs from NY County DA .....	.....
INVESTIGATION – Request Weather Report .....	.....
INVESTIGATION –Skip Trace Postal (Missing Defendant) .....	.....
INVESTIGATION –Fire Department records request.....	.....
INVESTIGATION –NYC Dept of Health, Bureau of Lead Poisoning.....

Miscellaneous Forms

GENERAL – Follow up Letter to all Persons
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Motions

MOTION - Adding Defendant to Action
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No-Fault Documents

NO-FAULT - Application (1st Page).....
NO-FAULT - Application Signature Page (revised 2/2004).....
NO-FAULT - Employer's Wage Verification Report .....	.....
NO-FAULT - Request for Arb., Def is Policy Holder .....	.....
NO-FAULT - Request for Arb., Plt is Policy Holder .....	.....
NO-FAULT - Request for Arbitration (General) .....	.....
NO-FAULT – Blank Letter to NF carrier.....	.....
NO-FAULT – Attending Physician’s Form (NF-3) .....	.....
NO-FAULT –Send copy of Summons & Complaint to NF carrier.....	.....
NO-FAULT – Verification of Hospital Treatment (NF-4).....

Note of Issue

NOTE OF ISSUE - w/Cert of Readiness & Aff of Compliance.....
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Notice of Discovery & Inspection

NOTICE - D&I - (Premises) Snow & Ice
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Notice of Intention To Make Claim

- NOTICE - Intent (MVAIC), P Pass (1 Car)
- NOTICE - Intent (MVAIC), P Pass (2 Def Cars).....
- NOTICE - Intent (MVAIC), P Ped (1 Car)
- NOTICE - Intent (MVAIC), Signature Page
- NOTICE - Intent P Op, 1-2 Def(s) (2 Cars)
- NOTICE - Intent P Pass (1 Car)
- NOTICE - Intent P Pass, 2-4 Defs (2 Def Cars).....
- NOTICE - Intent P Ped (1 car).....
- NOTICE - Intent To Make Claim (Signat. Portion)

Notice of Claim

- NOTICE OF CLAIM - CITY (Lead)
- NOTICE OF CLAIM - CONSTRUCTION, Pl & Sp v. City
- NOTICE OF CLAIM - CONSTRUCTION, Pl v. The City
- NOTICE OF CLAIM - FALL - On Roadway
- NOTICE OF CLAIM - FALL - On Roadway (with Spouse).....
- NOTICE OF CLAIM - for Disability Benefits.....
- NOTICE OF CLAIM - MABSTOA & NYCTA (MVA)
- NOTICE OF CLAIM - MABSTOA & NYCTA (Ped. Knockdown).....
- NOTICE OF CLAIM - MVA
- NOTICE OF CLAIM - MVA (with Spouse).....
- NOTICE OF CLAIM - NYC Only - Fall on Roadway
- NOTICE OF CLAIM - NYC Only - Fall on Sidewalk.....
- NOTICE OF CLAIM - NYCH&HC (Hospital Med Mal).....

Multiple Documents Grouped Together

- PACKS - MVA Initial Case Opening - except NF2.....
- PACKS - MVA - Sign up docs for signature

Letters to Plaintiff's Attorney

- PL ATTY - Status Request Letter

Letters/Documents for Police

- FOIA - Request for Detective's File & Photos NYPD.....
- POLICE REPORT REQUEST - MVA - (In Person)
- POLICE REPORT REQUEST - MVA - (Mail In).....
- RECHECK LETTER - Letter to Recheck Supervisor
- SECOND REQUEST- NYCPD, To Recheck Supervisor

Service of Process Letters

- PROCESS - Letter to Process Server w/ S&C
- PROCESS - Service by Investigator.....
- PROCESS - Service Through Local Sheriff.....

Response to Combined Demands

- RESPONSE - to Defendant's demands (db)

Retainer Statements

RETAINER STATEMENT - Fixed Rate

Letters to Schools

SCHOOL - Follow Up for Outstanding Records.....

SCHOOL - Request For Information

SCHOOL - Request For School Attendance Records

SCHOOL - Request for school info letter (Infant)

Settlement Documents

SETTLEMENT - Letter to Def Atty w/Release & Stip.....

Subpoenas

SUBPOENA - Defendant's Insurance Carrier

SUBPOENA - Federal Court.....

SUBPOENA - Hospital Bills (5 Hospitals)

SUBPOENA - Hospital Bills (So Ord)(5 Hos)

SUBPOENA - Non-party Witness To Appear for EBT

SUBPOENA - Police Aided/Accident Report.....

SUBPOENA - Witness to Appear At Courthouse.....

SUBPOENA DUCES TECUM - Affirmation for Queens Cty

SUBPOENA DUCES TECUM - Big Apple Pothole

SUBPOENA DUCES TECUM - Department of Transportation

SUBPOENA DUCES TECUM - Div. of Housing/Community.....

SUBPOENA DUCES TECUM - Employment Records

SUBPOENA DUCES TECUM - Hosp Bills, Outp't (So Ord)

SUBPOENA DUCES TECUM - Hospital Bills, Outpatient

SUBPOENA DUCES TECUM - Hospital Recs (So Ord).....

SUBPOENA DUCES TECUM - Hosp Bills, Inp't (So Ord).....

SUBPOENA DUCES TECUM - Hospital Bills, Inpatient

SUBPOENA DUCES TECUM - Hospital Med Recs

SUBPOENA DUCES TECUM MABSTOA.....

SUBPOENA DUCES TECUM - No-Fault

SUBPOENA DUCES TECUM - NYC Police Officer

SUBPOENA DUCES TECUM - Hosp Recs

SUBPOENA DUCES TECUM – Medical Provider (So Ordered)

Supplemental Demands for Damages (in accordance with CPLR 3017)

SUPPLEMENTAL DEMAND For Damages, 1 C/A.....

SUPPLEMENTAL DEMAND For Damages, 2 C/A derivative.....

SUPPLEMENTAL DEMAND For Damages, 3 C/A.....

SUPPLEMENTAL DEMAND For Damages, 4 C/A.....

SUPPLEMENTAL DEMAND For Damages, 5 C/A.....

SUPPLEMENTAL DEMAND For Damages, 6 C/A.....

SUPPLEMENTAL DEMAND For Damages, 7 C/A)

SUPPLEMENTAL DEMAND For Damages, 8 C/A.....

Substitution Documents

SUBSTITUTION - Cease & desist ltr to former atty
SUBSTITUTION - Fees & liens of former atty ltr.....
SUBSTITUTION - Initial Letter to Outgoing Atty.....

Letters to Witnesses

STATEMENT - 2nd Request For Witness Statement
STATEMENT - Letter to Witness Requesting Statement.....

Forms for Defense Work

Stipulations

DD STIPULATION - Extending Time to Answer.....
DD STIPULATION - of Discontinuance.....

UDMCs Replaced

COMB-RESP
HOSPITAL
HOSPITAL-NN
PHYSICIANS
PHYSICIANS-NN
SPECIALS