

# Shannon P. Metcalf

Partner

📞 (704) 319-5454

✉️ smetcalf@hedrickgardner.com



## Practices

Medicare Set-Asides and Medicare Compliance  
Workers' Compensation  
Retail, Restaurant, and Hospitality

## Bar Admissions

North Carolina State Bar

## Education

J.D., North Carolina Central University (magna cum laude), 2000  
B.S., Appalachian State University (magna cum laude), 1997

## Overview

With over 25 years of practice, Shannon brings extensive experience in helping clients minimize their legal exposure while maintaining a cost-conscious approach to each matter. She represents diverse clients, from small businesses to Fortune 500 companies, and professional sports teams.

As a Medicare Set-Aside Certified Consultant (MSCC), Shannon's practice also centers heavily on Medicare Secondary Payer Act compliance. She is an active member of the North Carolina State Bar, North Carolina Bar Association, North Carolina Association of Defense Attorneys, Mecklenburg County Bar Association, Defense Research Institute, and the National Medicare Secondary Payer Network.

Shannon's Medicare compliance services include:

- **MSP Act compliance** – Legal counsel for insurer and Medicare beneficiary compliance under the Medicare Secondary Payer Act as regulated by the Centers for Medicare and Medicaid Services (CMS)
- **Medicare Set-Aside services** – Advising on allocation needs, preparation of Medicare Set-Aside allocations and medical cost projections, and submission of Medicare Set-Asides to CMS
- **Comprehensive Medicare considerations** – Addressing Medicare's interest throughout all stages of litigated and non-litigated workers' compensation and liability matters, including settlement facilitation, Medicare claims resolution, conditional payment lien issues, and settlement document preparation
- **MMSEA Section 111 compliance** – Advising on mandatory insurer (RRE) reporting under the Medicare, Medicaid, and SCHIP Extension Act of 2007

Shannon resides in Charlotte with her husband, three children, and two dogs. She is a devoted

Appalachian State and Carolina Panthers fan.

## Experience

### Publications

- Changes to Medicaid's Right to Recovery From Injury Settlements are Drawing Near, North Carolina Bar Association *Course & Scope*, July 2017.
- Medicare Compliance in First-Party Claims, DRI *For the Defense*, May 2013.
- The SMART Act: A Sign of Positive Reform at CMS, *Course & Scope*, May 2013.
- Medicare's Mandatory Reporting Requirements & Their Anticipated Impact on the Insurance Industry, NCADA *The Defender* Spring 2010.

### Presentations

- *Navigating WCMSA Changes Made by CMS in 2025*, 2026 NCBA Workers' Compensation Section Program (February 2026)
- *Navigating WCMSA Changes Made by CMS in 2025*, 2025 NCBA Workers' Compensation Fall Program (November 20, 2025)
- *WCMSA 2025: Navigating the New & Next*, North Carolina Association of Defense Attorneys Webinar (April 2025)
- *New Medicare Mandatory Reporting Requirements of Workers' Compensation Claim Data*, North Carolina Workers' Compensation Education Conference (October 2024)
- *Plaintiff and Defendant Perspective on Resolving Conditional Payments with CMS*, Virtual RISE MSP World, The Mega Event for Medicare Secondary Payer (May 2024)
- *Navigating CMS Updates*, North Carolina Association of Defense Attorneys (NCADA) Exploring the Landscape of Workers' Compensation Today – CLE Seminar (April 2024)
- *Medicare Set-Aside v. Life Care Plan v. Medical Cost Projection*, The National Medicare Secondary Payer Network Annual Educational Conference (November 2023)
- Davidson, Annie, and Metcalf, Shannon, hosts. "Case Law Update." *Set-Aside Some Time*, episode 30, MSPN, 7 February 2023, <https://mspnetwork.transistor.fm/episodes/case-law-update>.
- *Conditional Payments Resolution in Liability Claims*, North Carolina Association of Defense Attorneys (NCADA) Fall Seminar (September 2022)
- *Conditional Payments Resolution in Liability Claims*, Virtual RISE 6th Annual Medicare Secondary Payer Conditional Payment Forum (July 2022)
- *Post-Settlement Conditional Payment Dispute Process with the BCRC*, Virtual RISE 5th Annual Medicare Secondary Payer Conditional Payment Forum (July 2021)
- *What Every Risk Manager Should Know About Medicare*, Virtual Carolinas RIMS Risk Manager Roundtable (April 2021)
- *Demonstrated Responsibility Perspective*, The National Medicare Secondary Payer (MSP) Network Virtual Conference (October 2020)
- *Is Your Claim READY for a Medicare Set Aside Allocation?*, North Carolina Public Risk Management Association (NCPRIMA) Annual Conference (September 2019)

- *Medicare Conditional Payment Liens*, North Carolina Association of Defense Attorneys (NCADA) Annual Meeting (June 2017)
- *MSA Updates, Private Cause of Action & Medicare Advantage Plans*, NC Bar Association Workers' Compensation Section Annual Meeting (February 2017)
- *WCMSA Re-Review Process*, NAMSAP 2016 Annual Meeting (September 2016)
- *Private Cause of Action & Avoiding Double Damages*, Medicare Secondary Payer Master Class Conference (January 2016)
- *Medicare Case Law Update*, Mastering the Medical Portion of the Case Seminar (April 2014)
- *Medicare Compliance Trends in Trenches*, NAMSAP presentation (January 2014)
- *Medicare's Interest in Liability Claims*, National Business Institute presentation (October 2013)
- *Strengthening Medicare & Repaying Taxpayers Act (SMART), H.R. 1845*, NCPRIMA Fall Educational Conference (September 2013)
- *A Legal Road Map Through the Medicare Secondary Payer Act*, NC Bar Association Workers' Compensation Section Annual Meeting (February 2013)
- *Medicare's Mandatory Reporting Requirements*, Medicare Secondary Payer Conference (October 2012)
- Regular speaker at client seminars on topics including Medicare Secondary Payer compliance and workers' compensation claims (annually)

## Awards & Honors

- Selected by peers for inclusion in [The Best Lawyers in America](#)© 2025 – 2026 in the field of Workers' Compensation Law – Employers
- AV peer-rated by [Martindale Hubbell](#)
- Selected to North Carolina's 2010 [Rising Stars list](#) in Workers' Compensation, published nationwide in *Super Lawyers Magazine*
- Listed as one of Business Leader's 2011 Movers & Shakers
- Recognized in the 2014 listing in The Bar Register of Preeminent Woman Lawyers
- Mecklenburg County Volunteer Attorney of the Year, 2006



## Involvement

- North Carolina Association of Defense Attorneys
- Mecklenburg County Bar Association
- North Carolina Public Risk Management Association

- Defense Research Institute
- The National Medicare Secondary Payer Network