



Shannon P. Metcalf

Partner

OFFICE Charlotte, NC

PHONE (704) 319-5454

FAX (704) 602-8081

EMAIL smetcalf@hedrickgardner.com

www.HedrickGardner.com

PRACTICES

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

EDUCATION

J.D., North Carolina
Central University (magna
cum laude), 2000

B.S., Appalachian State
University (magna
cum laude), 1997



"As a client of Hedrick Gardner, I enjoy the ease of having MSA's prepared by Shannon; however, more importantly, I have been impressed by the knowledge and professionalism she brings to the table." – Jan Pinion, Claims Manager

Shannon is a partner in the firm's Charlotte office and represents a variety of carriers and employers, from small businesses to large Fortune 500 companies, in the defense of workers' compensation claims. Her clients include reputable retail and insurance companies, as well as professional sports teams throughout the country. As a Medicare Set-Aside Certified Consultant (MSCC), her practice also focuses heavily on Medicare Secondary Payer Act compliance. Shannon 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 is AV peer-rated by Martindale-Hubbell and was selected to North Carolina's 2010 Rising Stars list in Workers' Compensation, published nationwide in Super Lawyers Magazines®. She was also listed as one of Business Leader's 2011 Movers & Shakers. Additionally, Shannon was recognized in the 2014 listing in The Bar Register of Preeminent Women Lawyers.

Shannon provides legal counsel, consulting services, and training in regard to Medicare Compliance matters, including but not limited to,

- Insurer compliance under the Medicare Secondary Payer (MSP) Act and as regulated by the Centers for Medicare and Medicaid Services (CMS);

BAR & COURT ADMISSIONS

North Carolina State Bar

PROFESSIONAL AND CIVIC INVOLVEMENT

North Carolina State Bar

North Carolina Association of Defense Attorneys

Mecklenburg County Bar Association

National Medicare Secondary Payer Network

North Carolina Public Risk Management Association

Defense Research Institute

- Counsel regarding the need for Medicare Set-Aside Allocations, preparation of Medicare Set-Aside Allocations, and submission of Medicare Set-Aside Allocations to CMS for approval;
- Consideration of Medicare's interest in all stages of litigated and non-litigated workers' compensation and liability matters, including facilitation of the settlement process, addressing options for resolving Medicare claims, resolution of conditional payment lien issues, and preparation of settlement documents to adequately address Medicare concerns; and
- Mandatory insurer (RRE) reporting compliance under Section 111 of the Medicare, Medicaid, and SCHIP Extension Act of 2007 (MMSEA).

PUBLICATIONS

- Davidson, Annie, and Metcalf, Shannon, hosts. "Case Law Update." *Set-Aside Some Time*, episode 30, MSPN, (7 February 2023)
- 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

- *Medicare Set-Aside v. Life Care Plan v. Medical Cost Projection*, The National Medicare Secondary Payer Network Annual Educational Conference (November 2023)
- *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)

HONORS

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

- *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)