



Medical Malpractice Case Management Checklist Template 2026

Initial Case Intake & Conflict Check

Verify all client details, perform comprehensive conflict of interest searches, and ensure all preliminary contact information is accurately recorded.

Plaintiff Full Name

Write something...

Defendant Healthcare Provider/Facility Name

Write something...

Date of Incident

Enter date...

Conflict Check Status

- ☐ Clear
- ☐ Potential Conflict Identified
- ☐ Conflict Detected - Case Rejected

Initial Document Checklist Received

- ☐ Signed Retainer Agreement
- ☐ Identification Documents
- ☐ Initial Incident Summary
- ☐ Contact Information Form

Client Intake Form Scan

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Attorney Conflict Clearance Verification

Medical Record Acquisition & Review

Organize the systematic collection, indexing, and auditing of all relevant hospital records, physician notes, nursing logs, and diagnostic imaging.

Date of Medical Incident

Enter date...

Facility Name

Write something...

Records Acquired

- ☐ Physician Progress Notes
- ☐ Nursing Logs
- ☐ Lab & Diagnostic Results
- ☐ Radiology/Imaging (DICOM)
- ☐ Prescription/Medication Administration Records
- ☐ Operative Reports

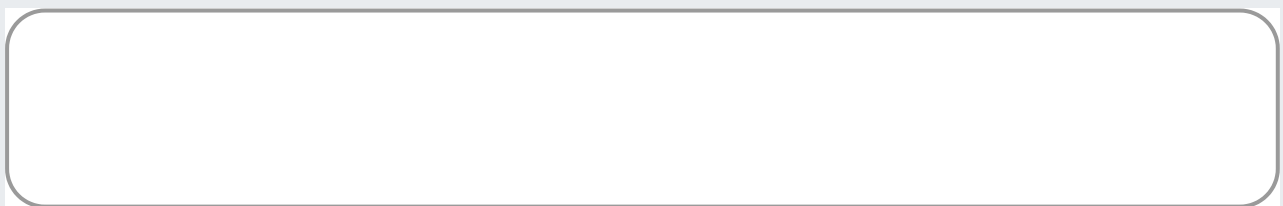
Upload Digital Medical Records

 **Upload File**

Discrepancies or Missing Information Notes

Write something...

Reviewer Verification Signature



Expert Witness Identification & Vetting

Identify, vet, and retain qualified medical experts, including checking their credentials, past testimony history, and availability for deposition.

Expert Witness Name

Write something...

Medical Specialty

Write something...

Vetting Status

- ☐ Pending Review
- ☐ Under Investigation
- ☐ Retained
- ☐ Rejected

Conflict of Interest Notes

Write something...

Expert CV/Resume

 Upload File

Initial Contact Date

Enter date...

Required Services

- ☐ Report Writing
- ☐ Deposition Testimony
- ☐ Trial Testimony
- ☐ Case Review Only

Evidence Preservation & Spoliation Audit

Ensure all physical evidence, digital medical logs, and device data are preserved and implement formal notices to prevent the destruction of relevant records.

Date of Evidence Preservation Order Issued

Enter date...

List of Preserved Physical Evidence

Write something...

Spoliation Risk Assessment Notes

Write something...

Evidence Types Secured

- ☐ Electronic Health Records (EHR)
- ☐ Medical Imaging (MRI/CT/X-Ray)
- ☐ Laboratory Results
- ☐ Pharmaceutical Logs
- ☐ Device/Equipment Logs
- ☐ Surveillance/Security Footage

Upload Spoliation Notice/Letter

 **Upload File**

Compliance Officer Verification

Standard of Care Analysis

Execute a detailed review of medical protocols against the documented actions to determine deviations from the established medical standard of care.

Identified Deviation from Standard

Write something...

Detailed Analysis of Medical Error

Write something...

Expert Witness Confirmation

- ☐ Standard of care breach confirmed
- ☐ No breach identified
- ☐ Inconclusive - pending further review

Expert Review Report

 Upload File

Analysis Completion Date

Enter date...

Lead Attorney Verification

Causation & Damages Assessment

Document the direct link between the alleged negligence and the resulting injuries, including a comprehensive breakdown of past and future medical expenses.

Causation Narrative

Write something...

Estimated Past Medical Expenses

Enter a number...

Estimated Future Medical Costs

Enter a number...

Date of Injury/Incident

Enter date...

Damage Documentation

 Upload File

Type of Injury Sustained

- ☐ Physical Injury
- ☐ Permanent Disability
- ☐ Emotional Distress
- ☐ Loss of Life
- ☐ Other

Litigation Timeline & Deadline Tracking

Maintain a precise chronological log of all medical events, statute of limitations deadlines, and court-mandated filing dates for 2026.

Statute of Limitations Deadline

Discovery Cut-off Date

Trial Commencement Date

Next Scheduled Hearing/Event

Case Status

- ☐ Pre-Litigation
- ☐ Discovery Phase
- ☐ Trial Pending
- ☐ Closed

Updated Court Calendar/Docket

 **Upload File**

Critical Milestone Notes

Write something...

Discovery Management & Deposition Prep

Oversee the exchange of interrogatories, requests for production, and the preparation of witnesses for upcoming depositions and testimony.

Discovery Deadline Date

Enter date...

Completed Discovery Requests

- ☐ Interrogatories
- ☐ Requests for Production
- ☐ Requests for Admission
- ☐ Deposition Notices

Deposition Transcript Upload

 Upload File

Deposition Summary & Key Findings

Write something...

Deposition Status

- ☐ Scheduled
- ☐ In Progress
- ☐ Completed
- ☐ Postponed

Attorney Review Confirmation

Settlement Negotiation & Mediation

Manage the preparation of settlement demand packages, organize mediation briefs, and track all communications with opposing counsel.

Mediation Scheduled Date

Settlement Demand Amount

Negotiation Status

- ☐ Pre-Mediation
- ☐ In-Mediation
- ☐ Offer Received
- ☐ Counter-Offer Extended
- ☐ Settlement Reached
- ☐ Negotiations Failed

Summary of Negotiation Terms

Write something...

Settlement Agreement Draft

 Upload File

Attorney Approval for Settlement

Case Closure & File Archiving

Finalize all financial disbursements, ensure all liens are satisfied, and execute the permanent archiving of the case file in compliance with regulatory standards.

Date of Case Closure

Enter date...

Closure Status

- ☐ Settled
- ☐ Dismissed
- ☐ Judgment Rendered

Total Final Settlement/Judgment Amount

Enter a number...

Documents Archived

- ☐ Final Court Order
- ☐ Settlement Agreement
- ☐ Disbursement Ledger
- ☐ Client Release Form
- ☐ Lien Satisfaction Letters

Final Closing Statement Upload

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Attorney/Paralegal Final Review Signature

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> Next

✔ Finish

🔧 Generate Sample Report