



Personal Injury Case Management Checklist Template

Initial Client Intake

Tasks related to the first interaction with the client and gathering initial information.

Client Name

Write something...

Contact Information (Phone, Email)

Write something...

Address

Write something...

Date of Incident

Enter date...


Brief Description of Incident

Write something...

Type of Injury

- ☐ Whiplash
- ☐ Broken Bone
- ☐ Soft Tissue Injury
- ☐ Head Trauma
- ☐ Other

Police Report (if applicable)

 Upload File

Investigation & Evidence Gathering

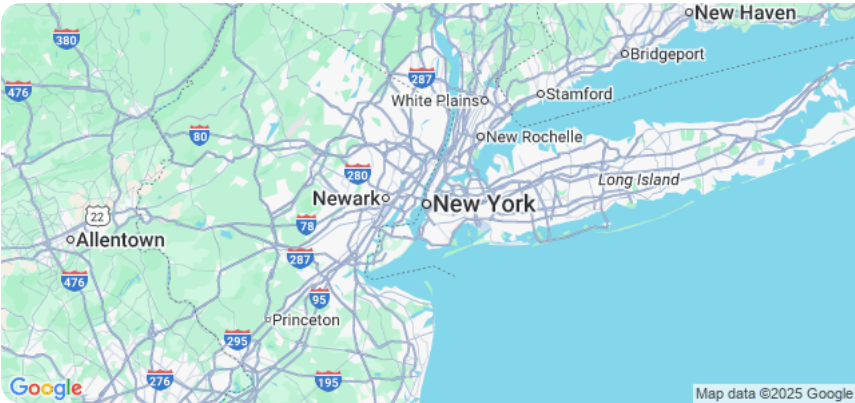
Steps for investigating the incident and collecting relevant evidence.

Date of Incident

Enter date...

Incident Location

📍 Set My Current Location



Police Report (if applicable)

📎 Upload File

Witness Statements (Summary)

Write something...

Potential Evidence Types

- ☐ Photos
- ☐ Videos
- ☐ Documents
- ☐ CCTV Footage

Photos of Scene/Damage

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Speed Limit (if relevant)


Medical Records & Treatment

Management of medical records, treatment plans, and related documentation.

First Treatment Date

Initial Diagnosis & Treatment Plan Summary

Emergency Room Records

 Upload File

Number of Physical Therapy Sessions

Last Treatment Date

Treatment Provider Type

- ☐ Physician
- ☐ Physical Therapist
- ☐ Chiropractor

Summary of Medical Opinion (If Available)

Write something...

Lost Wages & Expenses

Documentation and calculation of lost wages and other related expenses.

Hourly Wage

Enter a number...

Hours Missed per Day

Enter a number...

Days Missed

Enter a number...

Date of First Missed Work

Enter date...

Date of Last Missed Work (If Applicable)

Enter date...

Total Lost Wages (Calculated)

Enter a number...

Description of Expenses (e.g., Medication, Transportation)

Write something...

Total Expenses

Enter a number...

Supporting Documentation (Pay Stubs, Expense Receipts)

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Liability Assessment

Evaluating liability and potential defenses.

Summary of Incident Description

Write something...

Primary Party Responsible?

- ☐ Individual
- ☐ Company
- ☐ Government Entity
- ☐ Unclear

Estimated Liability Range (USD)

Enter a number...

Potential Defenses Identified

Write something...

Contributory Negligence Factors?

- ☐ Client Action
- ☐ Witness Testimony
- ☐ Environmental Conditions
- ☐ Lack of Warning
- ☐ None

Date of Liability Determination

Enter date...

Demand & Negotiation

Preparing and sending demand letters, and negotiating with opposing counsel.

Total Damages Claimed

Enter a number...

Demand Letter Narrative

Write something...

Demand Delivery Method

- ☐ Certified Mail
- ☐ Email
- ☐ Personal Delivery

Demand Letter Sent Date

Enter date...

Opposing Counsel Response Received

Write something...

Response Received Date

Enter date...

Counteroffer Amount (If Applicable)

Enter a number...

Negotiation Status

- ☐ Ongoing
- ☐ Settled
- ☐ Rejected

Litigation Preparation (If Applicable)

Steps for preparing for litigation, including discovery, depositions, and pre-trial motions.

Discovery Deadline

Enter date...

Deposition Scheduling Deadline

Enter date...

Expert Witness Selection Status

- ☐ Not Selected
- ☐ Under Review
- ☐ Selected
- ☐ Retained

Deposition Transcripts

 Upload File

Notes from Deposition Preparation

Write something...

Number of Depositions Scheduled

Enter a number...

Trial Date (if known)

Enter date...

Settlement & Release

Finalizing settlement agreements and releases.

Settlement Amount

Enter a number...

Summary of Settlement Terms

Write something...

Release Type

- ☐ Full Release
- ☐ Partial Release

Release Execution Date

Enter date...

Client Signature

Opposing Party/Representative Signature

Case Number for Reference

Write something...

Case Closure

Tasks related to closing the case file and ensuring all final paperwork is completed.

Case Closure Date

Enter date...

Summary of Case Outcome

Write something...

Attorney Signature

Client Signature (if applicable)

Final Settlement Amount (if applicable)

Distribution of Funds (if applicable)

- ☐ Attorney Fees
- ☐ Medical Bills
- ☐ Other Expenses

Case File Location (Physical)

Communication & Updates

Ensuring consistent and timely communication with the client throughout the case.

Last Client Communication Date

Communication Method

- ☐ Phone Call
- ☐ Email
- ☐ Mail
- ☐ In-Person Meeting

Summary of Communication

Write something...

Client Understanding of Updates?

- ☐ Yes, Fully Understood
- ☐ Mostly Understood
- ☐ Partially Understood
- ☐ Not Understood

Next Scheduled Communication Date

Enter date...