Tabzoola

Personal Injury Case File Checklist

Everything a plaintiff file needs from the first call to the closing statement.

Case / client: _____ Date: _____

- [ ] Intake sheet, retainer agreement and HIPAA authorizations
- [ ] Accident or police report
- [ ] Photos and video of the scene, vehicles and injuries
- [ ] Witness names and statements
- [ ] Medical records, one tab per provider
- [ ] Medical bills and the running total
- [ ] Health insurance, Medicare or Medicaid liens
- [ ] Lost wage documentation and employer letter
- [ ] Insurance policies, claim numbers and adjuster contacts
- [ ] Correspondence with insurers and opposing counsel
- [ ] Demand package and supporting exhibits
- [ ] Offers, counteroffers and the negotiation log
- [ ] Settlement statement and release
- [ ] If filed: pleadings, discovery and deposition transcripts

TAB IT: Tabzoola's 10-tab set for this binder

Intake & Retainer · Accident Report · Photos & Evidence · Medical Records · Medical Bills & Liens · Lost Wages · Insurance · Correspondence · Demand Package · Settlement

Printed on the tabs, collated and 3-hole punched with clear Mylar on every tab: 25 sets are $247.88 ($9.92 a set), every section renamed to yours at no extra cost, with a free PDF proof before anything prints.

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An organizing aid, not legal or financial advice. Follow your court's rules and your firm's procedures.