



Personal Injury Case Management Checklist



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Pre-Litigation Stage

This stage involves gathering initial information and preparing the case for possible settlement without going to court.

1.1 Initial Client Consultation

- Collect client information
- Assess the viability of the case
- Discuss the fee structure

Gather details thoroughly, listen attentively to the client's story, and clearly explain the fee agreement.

1.2 Case Evaluation

- Review the facts and evidence, determine the potential value of the case, and identify liable parties
- Conduct a detailed review of all available evidence
- Consult experts if necessary to assess the case accurately

1.3 Contingency Fee Retainer Agreement

- Prepare the agreement outlining payment terms
- Review it with the client
- Obtain signatures

Ensure the client understands the terms fully and keep a signed copy for your records.

1.4 Investigation

- Gather evidence
- Interview witnesses
- Obtain police and medical reports

Be meticulous in documentation, maintain a clear chain of custody for evidence, and keep detailed interview notes.

1.5 Medical Treatment

- Coordinate with medical providers
- Monitor the client's treatment progress
- Collect medical records

Stay in regular contact with medical providers and the client to ensure timely updates and accurate record-keeping.

1.6 Demand Prep Status

- Analyze damages
- Compile supporting documents
- Prepare the demand package
- Include all relevant documents and a clear summary of damages to strengthen the demand.

1.7 Demand Letter

- Draft a compelling, well-supported demand letter
- Review and finalize it with the client
- Send it to the opposing party

1.8 Settlement Negotiations

- Engage in negotiations
- Review offers with the client
- Finalize the settlement agreement
- Clearly communicate the pros and cons of settlement offers to the client, and be patient.

Make a Great First (and Second, and Third...) Impression with CASEpeer

Utilize CASEpeer's intake forms, document management, task management, medical management tools, and negotiation tracking to efficiently handle all pre-litigation tasks from client consultation to settlement negotiations.

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Litigation Stage

This stage covers the formal legal process once a lawsuit is filed.

2.1 Filing a Complaint

- Draft the complaint
- File it with the court
- Serve it to the defendants

Ensure the complaint is precise, legally sound, and served within the statutory deadlines.

2.2 Defendant's Response

- Review the defendant's answer
- Analyze any counterclaims
- Prepare a response strategy

2.3 Discovery

- Draft and serve discovery requests
- Respond to the defendant's discovery
- Conduct depositions

2.4 Pre-Trial Motions

- Identify necessary motions
- Draft and file them
- Attend hearings

Focus on motions that can significantly impact the case's outcome and prepare thoroughly for hearings.

2.5 Mediation/Settlement Negotiations

- Schedule mediation sessions
- Prepare mediation briefs and negotiate settlements

Keep All of Your Deadlines Met with CASEpeer

Manage court filing deadlines, responses, discovery requests, pre-trial motions, and mediation sessions using CASEpeer's calendaring, case analysis, and task tracking features.

3

Trial Stage

This stage involves preparing for and conducting the trial if the case doesn't settle.

3.1 Trial Preparation

- Develop trial strategy
- Prepare witnesses
- Draft trial briefs
- Present in court

Rehearse with witnesses, and ensure all exhibits are well-organized.

Take the Tediousness Out of Trials with CASEpeer

Organize trial materials, prepare witnesses, and track trial proceedings with CASEpeer's trial management features.

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Post-Trial Stage

This stage deals with actions after the trial concludes.

4.1 Post-Trial Motion

- Identify necessary motions
- Draft and file them
- Attend hearings

4.2 Judgment and Collection

- Obtain judgment
- Initiate collection efforts
- Monitor payments

Use all available legal tools for collection and maintain clear communication with the client about the process.

4.3 Appeals

- Evaluate grounds for appeal
- File a notice of appeal
- Prepare appellate briefs

4.4 Disbursement of Lien Negotiation

- Identify liens
- Negotiate reductions
- Disburse funds

Maintain clear records of liens and strive to maximize the client's net recovery.

Close Your Case The Correct Way Every Time with CASEpeer

Handle post-trial motions, judgment collection, appeals, and lien negotiations using CASEpeer's task management, calendaring, financial management, and appellate tools.

By tackling each task methodically and using CASEpeer's robust features, you can **streamline your workflow, boost client satisfaction, and improve case outcomes**. Unleash CASEpeer's full potential and see the impact on your efficiency.

