

CASE NO.: _____
DATE OF LOSS: _____
LOCATION: _____

RETAINER OUT – (SAM):

- SENT OUT RETAINER & MEDICAL AUTHORIZATION
- THREE DAY FOLLOW-UP
- RETAINER AND MED AUTHORIZATION SCANNED IN
- CASE # ASSIGNED
- PIP STATE _____
- E-MAIL TO DANNY AND JESS (CASE DETAILS)

TO BE OPENED – (JES):

- SET UP TM TABS
- TO DO TRIGGER PULLED
- ENTER **COMPLETE** INFORMATION INTO TIME MATTERS
- LETTER OF REP TO LIABILITY CARRIER
- LETTER OF REP TO PIP CARRIER **WITH PIP APP**
- WITNESSES CONTACTED AND STATEMENT SUMMARIZED
- MAILED FORMS LETTER TO CLIENT
- SOL ON MAIN CALENDER
- REQUEST POLICE REPORT
- SEND INITIAL REQUEST(S) FOR RECORDS & BILLS

DOCUMENT CHECKLIST – (JES):

MANDATORY

- AISG FORM
- POLICE REPORT
- DRIVER'S LICENSE
- QUESTIONNAIRE
- PHOTOS OF P CAR
- INJURY PHOTOS
- REPAIR ESTIMATES
- INSURANCE CARD
- CMS FORM
- DECLARATION PAGE
- LOST WAGE FORM

SECONDARY

- PHOTOS OF D CAR
- PHOTOS OF SCENE
- CITATION ISSUED
- HEARING CD
- RECORDED STATEMENT
- CASE SEARCH ON CLIENT
- CASE SEARCH ON DEFENDANT

FILE TRANSFER:

- FILE REVIEW BY LAURA AND DANNY
DATE: _____

TREATMENT – (DAN):

- TREATMENT CALLS
- ALL PROVIDERS ENTERED INTO TIME MATTERS
- DISCHARGED
DATE: _____
- COLLECTING LETTER SENT TO CLIENT

INSURANCE (PIP/MEDICAL/LIENS) – (DAN):

- PIP STATE _____
- PIP AMOUNT _____
- PIP WAIVED _____ CONFIRMED AS VALID _____
- PIP CONFIRMED _____ MED PAY CONFIRMED _____
- RECORDS AND BILLS SENT TO PIP
- PIP EXHAUSTED
- PIP LOG/TRANSMITTAL RECEIVED

DEMAND PACKAGE – (JES):

- DEMAND PACKAGE OUT
DATE: _____
- DEMAND TO DO'S DONE
- BILLS GIVEN TO HOO FOR BALANCE CONFIRMATION
- E-MAIL OFFER IN TO LGZ/RVM/HOO