



VITAL INFORMATION

FILE ASSIGNED TO: Attorney: \_\_\_\_\_ Legal Assistant: \_\_\_\_\_

CLIENT:

\_\_\_\_\_  
Name (and name of child if applicable) Place of employment

\_\_\_\_\_  
Street address or Post Office Box Employer Address

\_\_\_\_\_  
City, State, Zip Code City, State, Zip Code

\_\_\_\_\_  
Telephone Number(s) Telephone Number(s)

\_\_\_\_\_  
Social Security Number Date of Birth

\_\_\_\_\_  
Driver, Passenger, Pedestrian Name of Spouse

ACCIDENT:

\_\_\_\_\_  
Date of Accident Adverse Driver

\_\_\_\_\_  
City and County Address

\_\_\_\_\_  
Investigating Agency City, State, Zip Code

INSURANCE COMPANIES

COMPANY #1

COMPANY #2

\_\_\_\_\_  
Type of coverage (PIP, Liability, etc)

\_\_\_\_\_  
Type of coverage (PIP, Liability, etc)

\_\_\_\_\_  
Name of Company

\_\_\_\_\_  
Name of Company

\_\_\_\_\_  
Address

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip Code

\_\_\_\_\_  
City, State, Zip Code

\_\_\_\_\_  
Telephone Number(s)

\_\_\_\_\_  
Telephone Number(s)

\_\_\_\_\_  
Adjuster

\_\_\_\_\_  
Adjuster

\_\_\_\_\_  
Claim Number

\_\_\_\_\_  
Claim Number

\_\_\_\_\_  
Named Insured

\_\_\_\_\_  
Named Insured

\_\_\_\_\_  
Additional Insured

\_\_\_\_\_  
Additional Insured

ADDITIONAL INSURANCE COMPANIES

COMPANY # \_\_\_\_\_

COMPANY # \_\_\_\_\_

\_\_\_\_\_  
Type of coverage (PIP, Liability, etc)

\_\_\_\_\_  
Type of coverage (PIP, Liability, etc)

\_\_\_\_\_  
Name of Company

\_\_\_\_\_  
Name of Company

\_\_\_\_\_  
Address

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip Code

\_\_\_\_\_  
City, State, Zip Code

\_\_\_\_\_  
Telephone Number(s)

\_\_\_\_\_  
Telephone Number(s)

\_\_\_\_\_  
Adjuster

\_\_\_\_\_  
Adjuster

\_\_\_\_\_  
Claim Number

\_\_\_\_\_  
Claim Number

\_\_\_\_\_  
Named Insured

\_\_\_\_\_  
Named Insured

\_\_\_\_\_  
Additional Insured

\_\_\_\_\_  
Additional Insured

MEDICAL PROVIDERS

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip Code

\_\_\_\_\_  
Phone Number

Dates of Treatment\_\_\_\_\_

Account #\_\_\_\_\_

Records Ordered\_\_\_\_\_

Records Received\_\_\_\_\_

\_\_\_\_\_  
Name

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CHRONOLOGY OF TREATMENT

PRIOR MEDICAL HISTORY / INJURIES

## SUMMARY OF ACCIDENT FACTS

## SUMMARY OF INJURIES



## COVERAGES CHECKLIST

### PIP (No Fault)

- On Car:
- Other:
- Added reparation benefits?
- Copy of dec sheet obtained?

### LIABILITY

- On adverse car:
- On adverse driver:
- On adverse driver's spouse, employer, parent, household:

### UIM

- On car:
- On plaintiff:
- On plaintiff's spouse, employer, parent, household:

### HEALTH INSURANCE

- On client:
- On client's spouse:

### WORKER'S COMPENSATION

- If work related.

### MED PAY

- Review dec sheet to determine