TRACKING PROCEDURE FOR A PERSONAL INJURY CASE

I. OPENING

ACM	Prepares client accordion file with color folders and paperwork for basic intake file.
AA	Confirms and schedules office interview with client and assigns and notifies case manager.
AA	Schedules client for initial interview - coordinates with attorney. Allows one and one half hours. Asks client to bring accident report, all automobile insurance policies of all members of household, including hospitalization and medical plans, doctors' names, addresses and phone numbers. Informs them that they will be given a questionnaire to fill out. Be prompt. Give directions to building and front door! Assigns and notifies CM.
R	Receptionist prepares conference room and warmly welcomes potential client to the law firm. Be sure client is not illiterate. If so, case manager will assist client.
CM	Professionally dressed and groomed, introduces themselves and offers client the questionnaire and beverages.
R	After client fills out questionnaire, notifies AA that client is ready to meet Attorney.
A	Client interview (approx. one and one half hour) for post-interview work-up.
CM	15 minutes prior to end of interview after contract is reviewed, C.M. introduces oneself to client and reviews expenses homework sheet. Make 1 copy of contract, 1 copy of drivers' license and 3 homework sheets for client, one for file and one for expenses, and any other document (declaration sheet, accident report, etc.). Secures doctors name and business cards for client. Calls referring doctors and other acknowledging referral. Coordinates unfinished elements with client.
A	Determine if there is lost wages. If so, give client "Wage & Verification" form with self-addressed envelope so employer can return form to our office.
AA	After interview, list client on new cases roster on wall and onto referral list.
AA	Adds client to master list on computer and fills out Statute of Limitations card for our index file.