

Medical Malpractice Case Checklist:

Description of Case:

SOL:

IDOI Filed:

State Court Filed:

1. Client Intake Form:
2. Client Engagement Agreement:
3. Medical and Employment Authorization:
4. Get full provider list from client(s):
5. Get hearts/flowers list from client(s):
6. Request medical records / employment records / insurance ledger:
7. Notify Attorneys and Paralegals when records come in:
8. Create/Update Medical Chronology:
9. Create/Update Medical Expense Summary:
Date Last Updated:
10. Determine what experts will be needed:
11. Begin searching for experts:
12. Expert Report Received:
13. File IDOI pleadings:
 - Complaint
 - Appearance
 - Cover Letter
 - Check request
14. Send Discovery to Defendants as soon as appearance filed:
 - ROGs
 - RFPs
 - Expert
15. Select panel chair:

16. Plaintiff(s) Submission:

17. Received Defendant(s) Submission(s):

18. Reply Submission:

19. Panel Decision:

Result:

State Court Proceedings:

1. Get full provider list from client(s):

2. Get list of heart/flowers witnesses:

3. Request medical records / employment information / insurance ledger:

4. Begin medical expense summary and update as records come in:
Date Last Updated:

5. All medical records received?

6. Medical chronology/Summary of Injuries:

7. File initial pleadings:

- Complaint
- Appearance
- Summonses

8. Certificate of Issuance of Summons:

9. Send courtesy copy to insurance company to attorneys from IDOI proceedings:

10. Check service 15 days after filing and every week until we get service. If no service in 45 days need to bring to attorney's attention:

11. Answer from Defendant(s) due in 23 days after service:

12. Send discovery requests to Defendant(s) as soon as Answer filed. Follow up on responses after 60 days: Date Sent:

- Regular Date Received:
- Expert
- Affirmative Defense

13. Discovery Requests Received from Defendant(s):

Date Received:

Date Due:

Responses Served:

14. Send medical records to attorney as soon as Answer is filed (keep track of what is sent so we know if we need to supplement):

15. Once Answer filed, send draft CMO to opposing counsel and file praecipe for hearing to get trial dates:

16. Calendar CMO dates:

17. After discovery responses received schedule deposition of defendant:

18. Obtain experts and opinions:

19. Send Demand Letter within 1 year of filing:

20. If client is still treating update medical records every 6 months:
Last Follow-up date:

21. Schedule mediation after depositions completed:

22. Update liens 30 days prior to mediation:

23. Mediation binder 1 week prior to mediation: