

Personal Injury Intake Qualification Checklist

A free intake qualification checklist for personal injury firms that want faster call screening, cleaner case notes, and stronger follow-up on viable inquiries.

PI firm owners, intake teams, case managers, and legal admins

GUIDE

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WHAT THIS ASSET COVERS

- A first-call checklist for incident type, injury status, treatment, insurance, and timeline
- Prompts for conflict-screening and urgency handling
- A note structure for lawyer review and next-step follow-up

USE THIS WHEN

1. Intake quality varies by who answers the phone
2. Good cases get slowed down by messy initial notes
3. The firm wants more structure before attorney review

WORKING ASSET

CONFIRM FIRST

- caller and injured party
- incident date
- incident type
- medical treatment started or not
- representation status

QUALIFY

- injury severity
- fault context
- insurance involved
- police report or incident record
- witnesses or evidence available

ROUTE

- urgent attorney review
- follow-up needed
- not a fit

REMINDER

This checklist is for intake operations, not legal advice.

DEPLOYMENT NOTES

HOW STRONG TEAMS ACTUALLY USE THIS ASSET

- Assign one accountable owner instead of letting "Personal Injury Intake Qualification Checklist" become shared but unmanaged work.
- Use it with pi firm owners, intake teams, case managers, and legal admins in a weekly rhythm so the asset drives decisions rather than sitting in a folder.
- Decide in advance what counts as green, watch, and red performance so the team knows when to escalate.
- Capture learnings directly in the document every week so the asset becomes smarter over time instead of resetting to zero.

BEST DEPLOYMENT SEQUENCE

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WHAT SEPARATES A SERIOUS VERSION FROM A BASIC TEMPLATE

- Clear ownership for every step, not generic advice without accountability.
- Targets, thresholds, or decision rules that tell the team what good looks like.
- Specific working components: A first-call checklist for incident type, injury status, treatment, insurance, and timeline, Prompts for conflict-screening and urgency handling, A note structure for lawyer review and next-step follow-up.
- A built-in review cadence so the document becomes part of operations rather than a one-time download.