# Your accident and contacts

Type into the fields or print and write. Save the completed copy on your own device.

Use this organizer for your own notes; it does not file a claim or calculate compensation.
No email is required to download it. Do not send completed injury records to this website.

## 1. What happened?

Your name (optional)

Date and time of incident

Location and type of incident

Brief account of what happened / known witnesses

## 2. Insurance claim contacts

Insurance company / whose policy

Claim number

Adjuster or contact person

Phone / email

Other insurer, attorney, or billing contacts

For workplace injuries, also complete page 5. For attorney preparation, use page 4.

# Insurance conversations and next steps

Use this page for calls, emails, document requests, and follow-up questions.

## Conversation 1

Date / person / company / phone or email

What was discussed? What was requested?

Next action / who is responsible / date to follow up

## Conversation 2

Date / person / company / phone or email

What was discussed? What was requested?

Next action / who is responsible / date to follow up

## Conversation 3

Date / person / company / phone or email

What was discussed? What was requested?

Next action / who is responsible / date to follow up

Keep copies of correspondence. Ask the appropriate professional about deadlines; this workbook does not determine notice or filing requirements.

# Medical expenses, work, and daily life

Keep records of your losses and the effects of the injury. Add extra copies if needed.

## Medical expenses and payment questions

Treating provider / billing contact / phone

Bill date, provider, amount, insurance submission, and payment status

## Missed work and earnings

Employer / contact / dates missed / earnings records available

Work restrictions or other work-related questions

## Pain and suffering / effects on everyday activities

Date / what you experienced / activities affected / questions for your clinician

Describe your experience in your own words. Ask your healthcare professional about care.
These notes do not establish a claim value or guarantee payment.

# Prepare for your attorney meeting

Bring relevant records and use these questions to guide your conversation.

## What to bring, if available

Incident details, photos, witness contacts, and report information
Insurance policies, claim correspondence, settlement offers, and proposed releases
Medical bills, treatment records, work restrictions, and missed-work records
Your notes about pain and suffering, daily activities, and unanswered questions

## Questions to ask

Do you handle this type of case in the relevant state?
Who may be responsible, and what evidence or deadlines should we discuss?
What compensation may apply: medical expenses, lost wages, pain and suffering?
What other coverage, repayment issues, or claims should we consider?
Who will handle my case, and how will we communicate?
Is the consultation free? How are legal fees and separate costs calculated?
If there is no recovery, what expenses could I owe?
What should I understand before signing an agreement or settlement?
For a work injury: is this workers' compensation, a separate injury claim, or both?

Attorney / firm / contact / meeting date

Answers, next steps, and documents to gather

Confirm the attorney handles workers' compensation if that is the help you need.
General preparation only; an attorney can explain what applies to your situation.

# Workplace injury notes

Complete this page if your injury may be related to work. Otherwise, skip it.

Workers' compensation follows a different process from a personal injury lawsuit.
Do not assume lawsuit compensation categories apply to workers' compensation benefits.

## Employer and claim information

Employer / supervisor / phone or email

When and how you reported the injury / copy of report kept?

Workers' compensation insurer or administrator / claim number / contact

State agency / filing or notice questions to confirm

## Care, work, and questions

Care arrangements / approvals / billing contact / work restrictions

Questions about filing, benefits, missed work, a denial, or another responsible party

Ask the state agency or attorney about reporting and filing requirements promptly.
Employer reporting and employee claim filing may be separate steps.
Official state resources: dol.gov/general/topic/workcomp
North Carolina: ic.nc.gov/workers-compensation-claims/injured-workers