To stay organized, you may want to create a one-page at-a-glance sheet that provides key information you regularly need in one place so you can access it quickly. See a sample below:

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| JANE DOE- UIM CLAIM | |
| Venue: Washington County (C000000CV) | Opposing Counsel: Jane Smith  Phone:  Email: |
| UIM Arb Date: 03/20/22 | Claim No. XXXXXXXX |
| KEY CONTACT INFORMATION: | |
| Adjuster: | Phone:  Email: |
| Attorney for Insurer: | Phone:  Email: |
| Client: | Phone:  Email: |
| Witness: | Phone:  Email: |
| Date of Incident: May 27, 2021 | Claims: Negligence |
| Date of Filing: June 21, 2022 | Injuries: Left arm and shoulder injury; cervical and lumbar strain; headaches, **TMJ**, injury to right foot with plantar fascitis – injuries **“superimposed upon previous spinal and head trauma and pre existing spinal arthritis, causing pre existing condition to become symptomatic”** |
| Date of Service: N/A- UIM | Damages: Non-economic: $150,000; Meds: $17,000; Lost wages (self employment): $3,500.00 |
| Facts: UIM claim – coverage 100/300; Plaintiff stopped behind vehicle in front of transit mall heading in southwesterly direction when D’s vehicle rear-ended plaintiff’s car. Received $25,000 from Defendant’s liability carrier | |
| Witnesses: None known- other than Defendant | |
| Insurance Limits: $100/300- UIM claim | |
| Other side’s insurance?: Defendant: America Home Assurance Company – Policy No. 8675-309. | |
| PIP Ledger: $11,351 (Medical expense sheet provided by Insurer’s atty: Medicals: $11,203.56) | |
| Settlement Negotiation:   1. Demand amount date: 2. Offer amount date: | |
| Notes/To-Dos:   1. IME- Set for 10/25/22 with Jones 2. UIM arb will be scheduled or case settled 3. RFP out on 7/19/22 4. Property damage to vehicle: $10,845.56 5. Wage loss- Claimant self employed (claiming $3,500) | |

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**IMPORTANT NOTICES**

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