



Intake and Evaluation Matrix: Personal Injury

Directions: Use this form as a screening device for a new client intake. Write the number "1" in each blank that is applicable to your client. Each "column" should have only one number in a box. When the matrix is complete, add the numbers from left to right. Place the total in the "Total Per Row" column and multiply by the coefficient to obtain a score for each row. Add each Row Total and write the total score in the "Total Score" blank at the bottom of the page. Calculate the "Case Rank" by circling the letter which is closest to the client's "Total Score" using the "Score Box". If it applies, fill in the "Retainer" and "Evergreen" amounts based on the case ranking.

Case Ranking	Liability	Causation	Settlement Potential	Pre-Existing Conditions	Damages	Prior Claims	Litigation Potential	Case Value	Total Per Row
A	Very clear _____	No causation problems _____	Both parties want to settle _____	No pre-existing condition _____	Catastrophic Death / Deformation Surgery/ Fracture Clear PTLD _____	None _____	High Recovery Potential _____	\$100,000 + up _____	_____ X 1 = Score: _____
B	Clear / Average _____	Some causation problems _____	Very Good _____	No pre-existing condition _____	Objective Surgery/ Fracture PTLD Likely _____	None _____	Medium Recovery Potential _____	\$50,000 + _____	_____ X 2 Score: _____
C	Average / Poor _____	Definite causation problems _____	Average / Poor _____	Limited pre-existing condition _____	Soft Tissue Surgery Fracture _____	Limited prior claims _____	Low Recovery Potential _____	\$7,500 - \$20,000 _____	_____ X 3 Score: _____
D	Poor _____	Extreme causation problems _____	Poor _____	Pre-existing condition _____	No injuries Soft Tissue _____	Prior claims _____	Poor/No Recovery Potential _____	\$0 - \$7,500 _____	_____ X 4 Score: _____

Total Score: _____

Scoring Scale: 8 to 32 point scale

SCORE BOX	
(The lower the score, the better the case. Circle the final rank.)	
8 =	Perfect Client with Great Case Rank = A
16 =	Good Client with Good Case Rank = B
24 =	Difficult Client with Difficult Case Rank = C
32 =	Very Difficult Client with Very Difficult Case Rank = D

Retainer:

Evergreen:

Quarterly Review Questions:

Atty. Time Spent: _____ hrs. x \$_____ hr. = \$_____

Assoc. Time Spent: _____ hrs. x \$_____ hr. = \$_____

Staff Time Spent: _____ hrs. x \$_____ hr. = \$_____

Expenses = \$_____

Total Investment to Date \$_____

Compare to Budget \$_____

Differential \$_____

Case Evaluation Questions:

1. Upon discovery, have new liability, causation, pre-existing conditions, damages or prior claims issues changed the case value?
2. Should the case be routed for completion, litigation, settlement, further research, referral or closure? (Circle One)