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| Date: |  | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| **Client information** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Assigning Rep: | | | | | | | | | Phone: | | | | | | | | | | | Ext: | | | | | Email: | | | | | | | |
| Company: | | | | | | | | | Mailing address: | | | | | | | | | | | | | | | | | | | | | | | |
| Social Media: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Attorney: | | | | | | | | | Mailing address: | | | | | | | | | | | | | | | | | | | | | | | |
| Case name: | | | | | | | | | Claim number: | | | | | | | | | | | | | | | | Budget: | | | | | | | |
| Who/which party does client represent? | | | | | | | | Bill to: | | | | | | | | | | | | Address Report To: | | | | | | | | | | | | |
| **Report handling** | | | | | | | | | **Special Notes** | | | | | | | | | | | | | | | | | | | | | | | |
| Email  Mail  Fax | | | |  | | | | | Call to discuss before proceeding | | | | | | | | | | | Investigator to status client from field | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **Client Information:** | | | | | | | | | | **Subject Information:** *(multiple subjects use separate forms)* | | | | | | | | | | | | | | | | | | | | | | |
| Litigation support | | | AOE/COE | | | | | | | Subject name: | | | | | | | | |  | | | | | | | | | | | | | |
| Worker’s compensation | | | Site investigation: | | | | | | | Subject address: | | | | | | | | |  | | | | | | | | | | | | | |
| liability | | | Hospital/pharmacy  Physician search | | | | | | | Phone number: | | | | | | | | |  | | | | | | | | | | | | | |
| Other insurance | | | Social security: | | | | | | | | |  | | | | | | | | | | | | | |
| Corporate workplace | | | Service of process | | | | | | | Date of birth: | | | | | | | | |  | | | | | | | | | | | | | |
| Background | | | Domestic | | | | | | | Driver’s license no./state: | | | | | | | | |  | | | | | | | | | | | | | |
| Locate | | | Document retrieval | | | | | | | Subject’s occupation: | | | | | | | | |  | | | | | | | | | | | | | |
| Asset | | | Due diligence | | | | | | | Next medical appointment: | | | | | | | | |  | | | | | | | | | | | | | |
| surveillance | | | Other | | | | | | | Treating physician/ Address: | | | | | | | | |  | | | | | | | | | | | | | |
| Activity check | | |  | | | | | | | Specific injuries/Limitations: | | | | | | | | |  | | | | | | | | | | | | | |
| Live & well check | | | Height: | | | |  | | | | | Hair color: | | | | | | |  | | | | Sex: |  | |
|  | | | Weight: | | | |  | | | | | Race: | | |  | | | | | Have Photo? | | | | |  |
| Subject represented | | | Rush | | | | | | | Other physical description: | | | | | | | | |  | | | | | | | | | | | | | |
|  | | |  | | | | | | | Married: | | | | |  | | | | Kids: | | | |  | | | | | | Vehicle: | |  | |
| Deposition Taken? | | | Prior investigation | | | | | | | Date of loss: | | | | | |  | | | | | | | |  | | | | | | | | |
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| **Secure** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Police/traffic collision report | | | | | Personal file | | | | | | Medical authorization | | | | | | | Medical records | | | | | | | | | | Other records | | | | |
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|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Important dates | | Trial/hearing | | | | |  | | | | |  | **Video Format:** | | | | USB | | | | Dropbox and Portal | | | | | | | | | | | |
|  | | Decision date | | | | |  | | | | |  |  | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **\* Special Instructions:** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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