

Texas Injury Claim Toolkit

Free Printable Accident Forms, Checklists, Worksheets & Guides

Free public resource from Texas Settlement Calculator

No account. No purchase. No lead form. No document upload required.

For consumers, libraries, colleges, paralegal programs, and public-resource organizations. This combined PDF packages practical organizational resources also available individually at TexasSettlementCalculator.com.

Important: General educational information only. Not legal or medical advice. This Toolkit does not determine a filing deadline, preserve evidence by itself, establish liability or claim value, or create an attorney-client relationship.

1. Quick Start & Claim Information

Your name: _____
Incident date: _____
City / county: _____
Report number: _____
Investigating agency: _____
Insurance claim number(s): _____
Primary adjuster / contact: _____
Primary medical provider: _____
Employer / income source: _____

Start an organized file

- Create separate folders for incident, medical, insurance, and wage records.
- Keep original photographs and electronic files unchanged.
- Maintain a request log showing what was requested, from whom, and when.
- Calendar follow-up dates and deadline questions needing individualized review.

2. Medical Documentation Checklist

Provider chronology

Create a factual timeline; do not guess.

- List emergency, urgent-care, primary-care, specialist, therapy, imaging, pharmacy, and equipment providers.
- Record each service date, provider, location, and reason for visit.
- Keep referral orders and identify pending appointments.
- Note treatment interruptions and preserve the actual reason.

Records, bills, and imaging

- Request complete clinical records.
- Collect itemized bills showing charges, adjustments, payments, and balances.
- Preserve radiology reports and access to original images.
- Keep laboratory, operative, procedure, therapy, and discharge records.
- Check important records for correct incident date and reported mechanism.

Diagnoses, symptoms, and function

- Use provider documentation rather than self-diagnosis.
- Identify objective findings such as imaging, examination, electrodiagnostic, laboratory, or surgical findings.
- Record symptoms, frequency, and concrete functional limitations.
- Preserve written work/activity restrictions and impairment opinions when they exist.
- Preserve original dated photographs of visible injuries, devices, scarring, or recovery stages.

Prior conditions, work, and future care

- List prior injuries or treatment involving the same body area.
- Identify what changed after the incident.
- Keep work-status slips, wage statements, payroll/tax/leave records, and self-employment records.
- Keep written recommendations for future care and track unresolved referrals.

3. Insurance Coverage Checklist

Identify policies

- Collect complete policies and declarations pages.
- Identify the other driver's carrier, claim number, adjuster, stated limits, and coverage position.
- Identify employer, commercial, rental, rideshare/delivery, owner, excess, and umbrella policies that may apply.

Liability and limits

- Confirm the policy period includes the incident date.
- Record bodily-injury limits per person/per accident and property-damage limits.
- Keep denials, reservations of rights, exclusions, limits disclosures, offers, demands, and releases.
- Identify whether multiple claims may compete for a per-accident limit.

UM/UIM, PIP, MedPay, health

- Locate UM/UIM limits and any written rejection/selection document.
- Give your carrier notice of a possible UM/UIM claim and keep proof.
- Locate PIP/MedPay limits and any written rejection relied upon.
- Keep applications, bills, payment logs, EOBs, and denial letters.
- Identify possible Medicare, Medicaid, TRICARE, ERISA, workers' compensation, lien, or reimbursement issues.

Communications

- Maintain a contact log.
- Save recorded-statement requests, authorizations, and releases.
- Read every release carefully; seek individualized advice if its effect is unclear.

4. Lost-Wage Documentation Worksheet

Organizes reported income loss; it does not determine recoverability or future earning-capacity loss.

Employer / business: _____

Occupation: _____

Normal schedule: _____

Date last worked normally: _____

Return date / expected return: _____

Medical restriction source: _____

Hourly employee

Hourly rate: _____ Regular hours missed: _____

Overtime rate: _____ Overtime hours missed: _____

Bonus / commission missed: _____

Salaried employee

Annual salary: _____ Workdays per year: _____

Workdays missed: _____ Bonus / commission missed: _____

Paid leave used: _____

Self-employed / variable income

Projected net income: _____

Actual net income: _____

Cancelled contracts / jobs: _____

Replacement labor cost: _____

Other documented loss: _____

4. Lost-Wage Documentation Worksheet - Supporting Records

Supporting records

- Medical work-status slips
- Employer wage verification
- Pay stubs / payroll
- W-2 / 1099 / tax records
- Leave / attendance records
- Commission / bonus records
- Invoices, contracts, calendars, and business records

5. Limitations-Date Screening Worksheet

Educational screening only. Texas personal-injury claims commonly begin with a two-year limitations period, but accrual, tolling, governmental notice, health-care-liability rules, minority, parties, claim type, and other facts can change the analysis. Do not treat this worksheet as a legal deadline calculation.

Incident date: _____
Ordinary two-year calendar anniversary: _____
Governmental entity involved? _____
Minor injured person? _____
Possible health-care-liability claim? _____
Possible tolling / accrual issue? _____
Other notice requirement? _____
Date individualized review requested: _____

Questions to flag

- Governmental entity or public institution involvement.
- Minor injured person.
- Possible health-care liability.
- Uncertainty about accrual or tolling.
- Contractual, policy, administrative, or other notice requirements.
- Any deadline that may already have passed or is approaching.

6. Claim Document Organizer

Incident records

- Report and supplements
- Scene photographs/video
- Vehicle photographs/estimates
- Witness information
- 911/dispatch/agency records when relevant

Medical

- Emergency/hospital
- Primary care
- Specialists
- Therapy/rehabilitation
- Imaging
- Procedures/surgery
- Pharmacy/devices

Billing and income

- Itemized bills
- Account ledgers
- Health EOBs
- PIP/MedPay payments
- Outstanding balances
- Work-status slips
- Employer verification
- Payroll/tax records
- Self-employment records

Insurance and correspondence

- Declarations pages
- Complete policies
- Claim numbers/adjuster contacts
- Coverage letters
- Recorded-statement requests
- Authorizations
- Offers/demands/releases

6. Claim Document Organizer - Personal Organization

Personal organization

- Symptom/function notes
- Expense receipts
- Mileage/transportation log
- Assistance by others
- Request/follow-up log
- Appointments and important dates

7. Crash & Police Report Lookup Guide

Statewide crash-report starting point

- TxDOT is the statewide custodian for qualifying Texas peace-officer crash reports (CR-3).
- Use the current TxDOT crash-report records page to confirm eligibility, fees, retention information, and purchase instructions.
- A statewide crash report and a local agency's broader investigative file are different records and may contain different materials.

Identify the correct local agency

- Record the investigating agency, crash date, approximate time, location, report/case number, and involved parties.
- Local police, sheriff, DPS, or another agency may hold photographs, recordings, field notes, dispatch/CAD, or other investigative material.
- Verify current request instructions, fees, confidentiality rules, and retention periods on the official government source.

Keep a request log

- Record what was requested, from whom, when, how it was submitted, any fee paid, and the response status.
- Keep copies of requests, confirmations, receipts, and records received.

Online guide: <https://texassettlementcalculator.com/tools/texas-crash-police-report-lookup>

8. Medical Bills & EOB Organizer

Keep separate numbers separate

- Provider billed charge
- Insurance contractual adjustment
- Insurer payment
- Patient payment
- Current reported balance
- Explanation of benefits (EOB) received?

Provider / facility: _____
Service date: _____ EOB received? _____
Billed: _____ Adjustment: _____ Insurer paid: _____
Patient paid: _____ Reported balance: _____

Records to match

- Complete itemized provider bill
- Health-plan or other insurer EOB
- Payment and adjustment history
- Patient statements and receipts
- Lien, subrogation, or reimbursement correspondence, if any

Questions to investigate

- Does the service date and provider match the medical record?
- Is an EOB missing for any submitted charge?
- Are there duplicate charges or separate professional/facility bills?
- Has any payer asserted reimbursement or subrogation?

Online organizer: <https://texassettlementcalculator.com/tools/texas-medical-bills-eob-organizer>

9. Texas Hospital Lien Guide & Checklist

General educational information only. Texas Property Code Chapter 55 contains specific requirements that depend on the facts and current law.

Identify a possible lien

- Record the accident date and date/time of hospital admission or emergency medical services.
- Identify the hospital, transfer hospital, and any EMS provider asserting a lien.
- Keep lien notices, itemized bills, EOBs, payment records, and correspondence together.
- Do not assume every unpaid medical bill is a valid Chapter 55 lien.

Check filing and notice information

- Identify the county where services were provided.
- Record the filing date, instrument/recording number, provider, patient, and accident information.
- Keep any written notice sent after recording.

Reconcile and document resolution

- Match lien charges to actual dates/services and separate billed, adjusted, paid, and outstanding amounts.
- Flag duplicate, unrelated, already-paid, or otherwise inconsistent charges for individual review.
- Keep written reduction, release, payment, withdrawal, discharge, or other resolution documentation.

Official statute: <https://statutes.capitol.texas.gov/Docs/PR/htm/PR.55.htm>

Online checklist: <https://texassettlementcalculator.com/tools/texas-hospital-lien-guide-checklist>

10. DWI Evidence-Preservation Checklist

Scene and police records

- Save report number and investigating agency.
- Preserve witness contacts and original scene/vehicle/injury media.
- Identify body-camera, dash-camera, 911, dispatch, CAD, and radio records.
- Request available supplements, diagrams, photographs, measurements, and investigator notes.

Intoxication investigation

- Identify breath, blood, toxicology, and laboratory records.
- Preserve available warrants, affidavits, consent forms, chain-of-custody and instrument-maintenance material.
- Identify field-sobriety recordings, roadside observations, booking video, and offense reports.
- Track criminal case number, court, prosecutor's office, and scheduled proceedings.

Possible alcohol-provider evidence

- Identify locations where alcohol may have been purchased, served, or consumed.
- Preserve receipts, tabs, payment records, and available surveillance.
- Record servers, bartenders, managers, companions, and witnesses.
- Preserve lawfully available texts, social posts, photographs, rideshare history, and location history.

Preservation follow-up

- Log requests, recipients, dates, responses, and stated retention periods.
- Keep copies of preservation requests and delivery confirmations.
- Do not alter, delete, discard, repair, or surrender potentially important evidence without understanding the consequences.

11. Commercial-Truck Evidence Checklist

Immediate evidence

- Save report number, agency, unit numbers, carrier name, USDOT number, plates, and trailer identifiers.
- Preserve original scene, roadway, debris, cargo, vehicle-damage, and injury media.
- Record witnesses/first responders and nearby cameras.
- Do not repair, sell, salvage, download, or dispose of an involved vehicle before considering whether inspection is needed.

Electronic, ELD, and trip data

- Identify ECM/event-data-recorder information.
- Identify ELD records, edits, annotations, certifications, and transfer data.
- Identify GPS, dispatch, route, geofence, fleet-management, and telematics records.
- Identify forward-facing, driver-facing, trailer, loading-dock, and third-party video.
- Collect dispatch, trip sheets, bills of lading, fuel/toll/scale/lodging/delivery records.

Driver, maintenance, cargo, contracting

- Identify driver qualification, license/endorsement, prior-employer, driving-record, medical-qualification, and training records when applicable.
- Preserve inspection, maintenance, repair, out-of-service, towing, storage, salvage, and component records.
- Preserve bills of lading, manifests, weight tickets, securement records, and loading photographs.
- Identify shipper, broker, freight forwarder, loader, lessee, equipment owner, motor carrier, and contractors.
- Preserve applicable contracts, leases, dispatch agreements, rate confirmations, and insurance certificates.

Insurance and follow-up

- Identify liability, excess, umbrella, cargo, trailer, and other potentially applicable policies.
- Maintain a preservation/request log and calendar follow-up.
- Do not alter evidence or make unsupported public accusations.

12. Autonomous Vehicle Evidence & Records Checklist

Trip, vehicle, and incident identification

- Save trip receipt, pickup/drop-off details, timestamps, and rider/app information available to you.
- Record vehicle, plate, fleet, or other identifier when available.
- Record the date, time, location, agency/operator reference numbers, and witness contacts.

Original scene and device records

- Preserve original photographs and video without editing the originals.
- Save screenshots or exports of trip/app information available to you.
- Preserve emails, texts, support chats, notifications, operator communications, towing/storage, and damaged-property records.

Potential automated-system records to identify

- Event or recording-device data, if available.
- Vehicle telemetry, route/location history, cameras, sensors, automated-driving-system status, and remote-assistance records, if available.
- Fleet maintenance, inspection, or service records when relevant and lawfully available.

Insurance, medical, work, and follow-up

- Organize liability, UM/UIM, PIP/MedPay, claim, and coverage documents.
- Track providers, service dates, itemized bills, imaging, restrictions, wage documentation, and expenses.
- Keep a preservation/request log and record responses or stated retention periods.

Online checklist: <https://texassettlementcalculator.com/tools/texas-autonomous-vehicle-evidence-records-checklist>

13. Request / Follow-Up Log

Date	Item requested	From whom	Method	Response / next step
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14. Online Resources

Toolkit landing page

<https://texassettlementcalculator.com/texas-injury-claim-toolkit>

All free claim tools

<https://texassettlementcalculator.com/tools>

Medical documentation checklist

<https://texassettlementcalculator.com/tools/texas-injury-medical-documentation-checklist>

Insurance coverage checklist

<https://texassettlementcalculator.com/tools/texas-accident-insurance-coverage-checklist>

Lost-wage worksheet

<https://texassettlementcalculator.com/tools/texas-lost-wage-documentation-worksheet>

Limitations-date screening

<https://texassettlementcalculator.com/tools/texas-personal-injury-limitations-date-screening>

Claim document organizer

<https://texassettlementcalculator.com/tools/texas-personal-injury-claim-document-organizer>

Crash / police report lookup

<https://texassettlementcalculator.com/tools/texas-crash-police-report-lookup>

Medical bills & EOB organizer

<https://texassettlementcalculator.com/tools/texas-medical-bills-eob-organizer>

Hospital lien guide & checklist

<https://texassettlementcalculator.com/tools/texas-hospital-lien-guide-checklist>

DWI evidence checklist

<https://texassettlementcalculator.com/tools/texas-dwi-evidence-preservation-checklist>

Commercial-truck evidence checklist

<https://texassettlementcalculator.com/tools/texas-commercial-truck-evidence-checklist>

Autonomous-vehicle evidence checklist

<https://texassettlementcalculator.com/tools/texas-autonomous-vehicle-evidence-records-checklist>

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