

Personal Injury Filing and Serving Playbook

How to optimize your filing and serving processes for greater efficiency, accuracy, and security



The landscape

Personal injury law carries unique challenges for filing and serving. No one wants their file or serve rejected, but for PI firms, rejections can be a fatal blow to your case. Other challenges include step-heavy workflows eating up your staff's time, how to grow strategically without adding headcount, keeping a tight rein on your recordkeeping, and, finally, protecting the sensitive data common to PI cases.

These challenges aren't insurmountable, however. A tech-enabled filing and serving platform can offer solutions:

- Built-in checks for noncompliance, backed by human expertise
- Significant cuts to your file and serve workflows
- Automated workflows, increasing productivity while reducing stress on staff
- Facilitating the seamless flow of documents to your document management system
- Compliance with the highest security standards

Let's dig deeper into each of these challenges of personal injury law and how they can be addressed through a sophisticated filing and serving system.

Reducing rejections

Rejections are especially problematic for personal injury firms. PI cases usually can't be refiled. You can't afford to have a missed deadline or noncompliant document blow your one shot. Statutes of limitation are absolute, and the defense often has the resources to aggressively scrutinize your documentation.

Solution:

A top-notch tech-enabled filing and serving system can help reduce rejections. Make sure the system you choose offers:

- Built-in rules validation to flag noncompliant submissions before they reach the court
- Training to help your support staff with best-practice filing and document requirements
- If rejections do happen, our expert team with deep jurisdictional knowledge helps achieve a speedy resolution

Cutting steps in your workflow

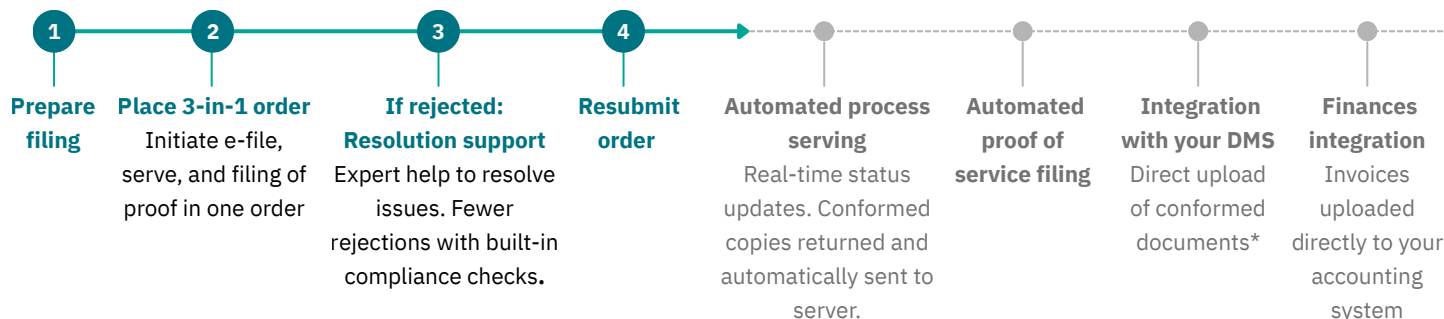
A step-heavy workflow for filing and serving is a reality for most PI firms, and it's a drag on your time, staff, and costs. Reworking rejections, chasing down the status of your serves, downloading and uploading proofs to your document management system (DMS) are all steps that take time and resources away from strategically growing your business.

If you're like most PI firms, your filing and serving workflow looks something like this:



Solution:

Imagine a 10-step process collapsing to four or even two steps. The right tech-enabled filing and serving platform can make your workflow look something like this:



*Proceed offers API integrations with top legal tech like Clio, NetDocuments, and iManage.

Growing without adding to headcount

Personal injury firms have to be especially strategic about growth. Having to wait months or even years for settlements can significantly affect cash flow. Growth at the wrong time can leave you caught short. Being able to grow without adding staff gives you an advantage. What's more, the challenge of finding skilled PI attorneys often leaves paralegals overstressed. Automation is the answer to these challenges.

Solution:

Procure a tech-enabled e-filing and process serving system that, through automation, can help you grow without adding to your staff or overburdening staff. A platform like Proceed:

- Reduces time spent in the file and serve workflow
- Reduces rework of rejected filings
- Reduces need for vendor management with one centralized platform
- Provides training for staff from system experts
- Provides an intuitive, easy-to-use platform

Recordkeeping hygiene

Keeping impeccable records and audit trails is critical to PI firms. With cases lasting longer than average, records can go missing, and that can hurt your settlement or appeal.

Solution:

Consolidate multiple systems into one tech-enabled system to ensure you never lose sight of your records:

- Every filing, proof of service, and invoice is tracked in one centralized dashboard
- Allows for the upload of GPS coordinates and timestamped photos

Locking in security

You're dealing with PHI and other sensitive information all day, every day. A breach would deal a serious blow to your firm's reputation. You need your e-filing and serving partners to uphold strict standards for sensitive data.

Solution:

Partner with a tech-enabled system that takes security as seriously as you do. Make sure the system offers:

- ▶ **SOC-2 compliance:**
A framework developed by the American Institute of Certified Public Accountants that measures security, availability, processing integrity, confidentiality, and privacy
- ▶ **Consolidated systems:**
Using a single system to handle filing and serving reduces the potential for data compromise
- ▶ **DMS integration:**
When documents flow directly to your document or practice management system, you eliminate the need to for extra handling and subsequent potential for breach

Checklist for Optimizing Filing and Serving Process

Partner with a tech-enabled system that will:

- ☐ Cut workflow steps by half (or more)
- ☐ Automatically check for noncompliant documents
- ☐ Integrate with your DMS for tighter recordkeeping and invoicing
- ☐ Ensure data security

Ready to optimize?

Proceed provides industry-leading litigation support across the dispute lifecycle. With our national reach and innovative technology, our filing and process serving services can help you meet and overcome the challenges of running a successful personal injury firm.

Contact us today to learn more.

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